



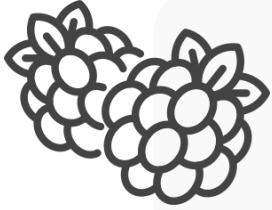
roamler

BERRY MONITOR 2021

UK / DE / PL / DK / BE / IT / ES / FR / NL



BACKGROUND



The Berry Category is known for being highly **fragmented**, with high volumes and low margins. As market conditions change continuously, it makes this market very competitive and volatile, whilst growing fast in volume.



Having fast **insights** on the development of price, assortment, and understanding which suppliers or which country of origin delivers to which retailer, allows Growers, Exporters & Service Providers to **optimize** their own proposition to these retailers.



There is **limited data available** from traditional sources like Nielsen, IRI, GFK.

Roamler has access to all stores in Europe every week, allowing us to collect and process pictures & insights efficiently, and present it to you in an attractive **online dashboard**



ROAMLER AND FRESH PRODUCE

Fresh Produce Lead:
Christiaan Rijnhout
At Roamler since 2011



Roamler has built up extensive experience in the **Fresh Produce market** over the past 10 years, mainly driven by **Christiaan Rijnhout**. Coming from a Fresh Produce family, he knows the dynamics of the market well, which he has successfully translated into numerous client propositions over the years.

As a result, Roamler is proud to be serving more than 30 clients in the **Fresh Produce market** on a regular basis. Ranging from Growers, to Seed Breeders and Exporters.



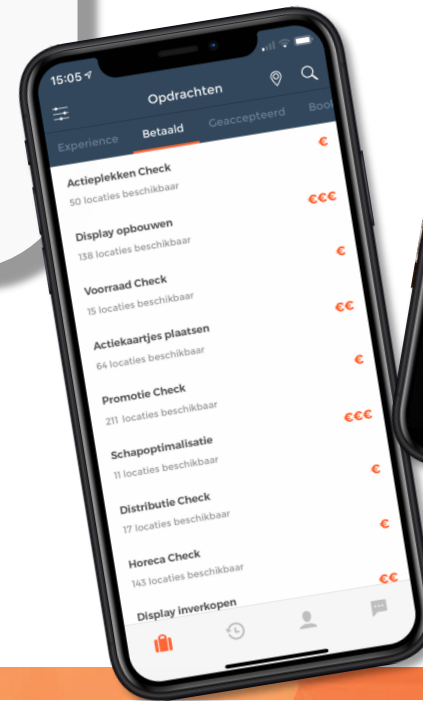
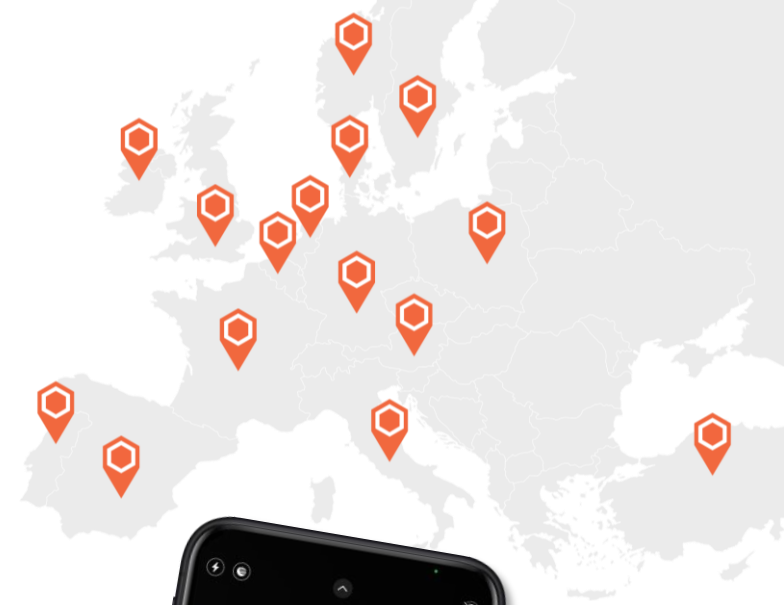


HOW IT WORKS

A flexible workforce anytime, anywhere.

Roamler's flexible **workforce** are your eyes, ears, and hands in every marketplace. Tens of thousands of Roamler app users visit stores throughout Europe everyday, simultaneously.

This give us quick access to stores, where we check and optimize in-store execution, from on shelf availability to mystery shopping and merchandising. Giving you access to instore insights coming from extensive **questionnaires** and detailed **photos**.

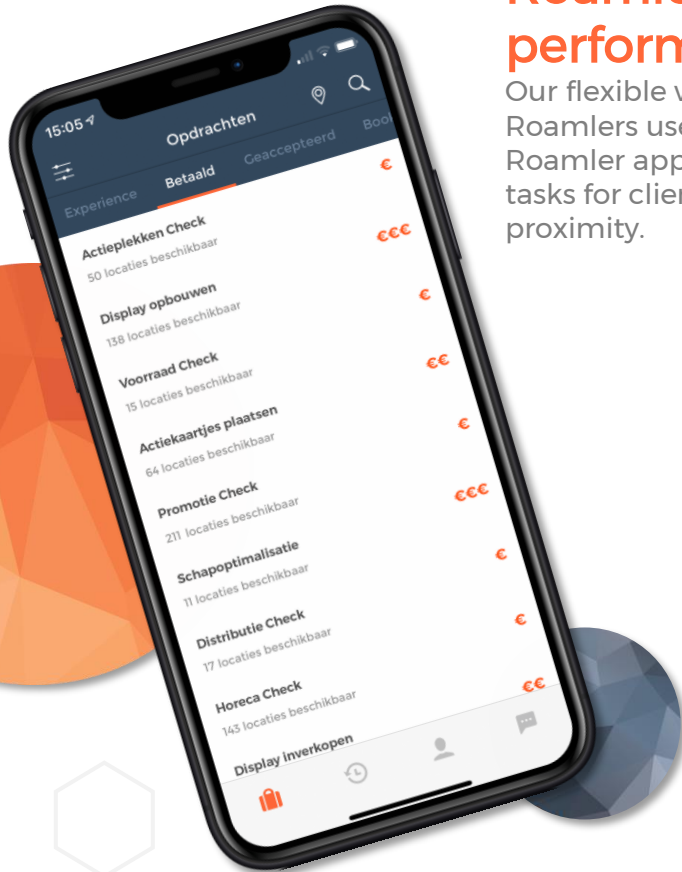




HOW IT WORKS

Step 1: Roamlers perform tasks

Our flexible workforce of Roamlers use the mobile Roamler app to perform paid tasks for clients in their proximity.

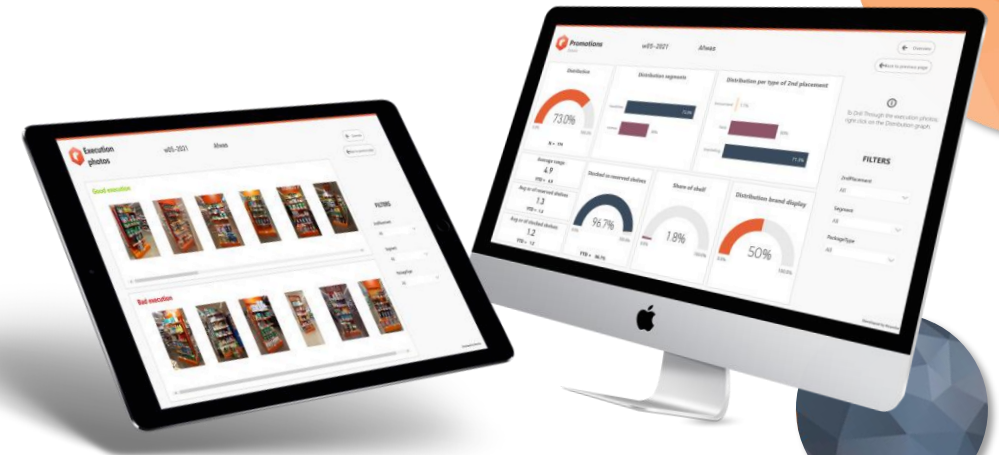


Step 2: Reviewing

Roamler's team of reviewers check every submitted task manually on quality. Assuring us to deliver data with the highest quality.

Step 3: Custom Dashboards

In our custom, interactive PowerBI dashboards we are able to present the insights at glance.





INTRODUCING THE BERRY MONITOR

THE BERRY MONITOR

Get weekly or monthly data from over 500 locations across Europe

- Receive **insights on how berries are marketed** and displayed in-store throughout Europe with in-depth SKU and Category information
- Save budget and time with an easy shared subscription model that delivers new insights every month. No management from your side.





INTRODUCING THE BERRY MONITOR

What does the European Berry landscape look like, in terms of **distribution** and **presentation**? We monitor:



Categories

- Blueberries
- Raspberries
- Strawberries
- Blackberries
- Red berries
- Mixed packaging

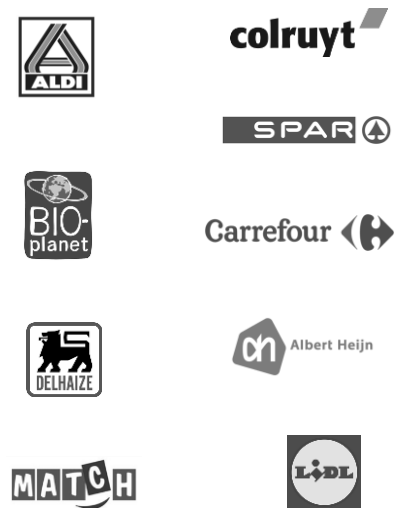
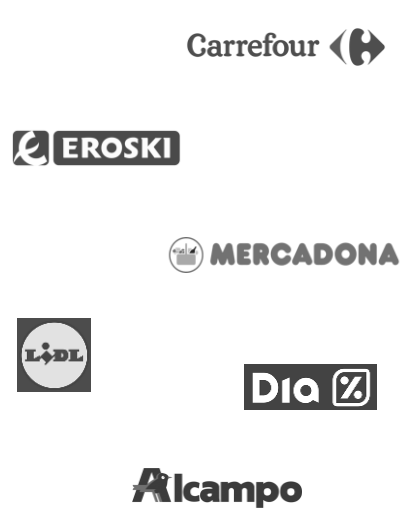
Key KPI's

- Weight
- Country of origin
- Supplier / brand
- Selling price
- Type of packaging
- Organic vs conventional

Additional metrics

- Cooled vs Ambient presentation
- Adjacent categories
- Count of facings / IFCO per category
- Count # of SKUs per category



UK3016 visits per year. **Weekly** data.**DE**2210 visits per year. **Weekly** data.**NL**552 visits per year. **Monthly** data.**IT**312 visits per year. **Monthly** data.**DK**480 visits per year. **Monthly** data.**BE**612 visits per year. **Monthly** data.**ES**372 visits per year. **Monthly** data.**FR**1176 visits per year. **Monthly** data.**PL**348 visits per year. **Monthly**.Scope of the
Berry Monitor

THE BERRY DASHBOARD

Analyze - Insights

Once the data has been checked, it is available to you through an intuitive live **dashboard**.

Log into your dashboard and filter in berry data according to your most relevant **KPIs**.

Compare monthly or weekly **insights** and statistics to analyze trends, identify opportunities and make forecasts.

[Go to DEMO](#)





THE BERRY DASHBOARD

How to start?

1 Select one or more fruits:

Blackberries Blueberries Mixed berries **Raspberries** Red berries Strawberries

2 Select one or more countries:

Belgium Denmark France **Germany** Italy

Norway Poland Spain The Netherlands United Kingdom

Latest week **Start** **i** Set up

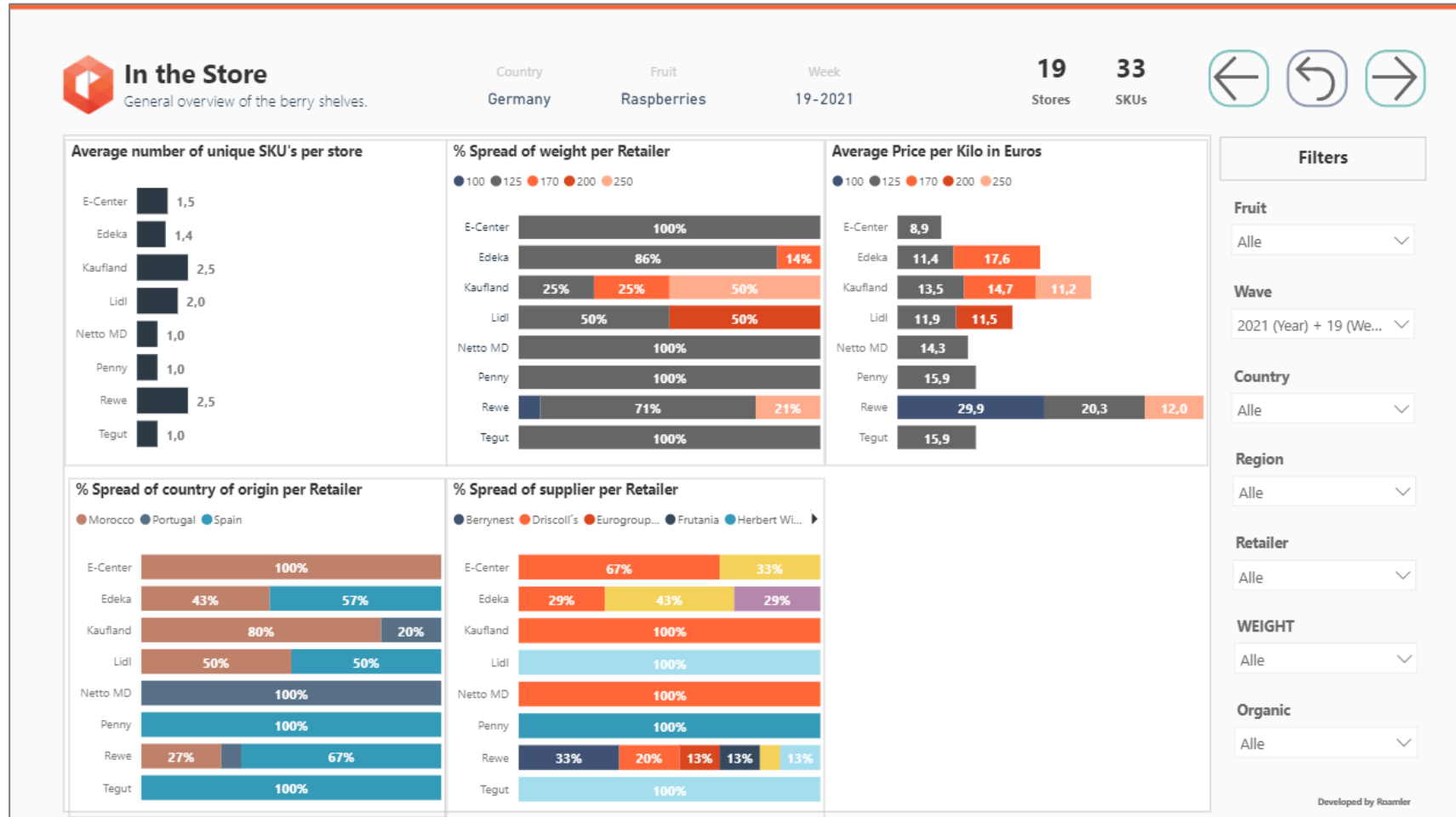
Developed by Roambar

WELCOME SCREEN

Start your analysis by selecting the Berry and Country of your interest



THE BERRY DASHBOARD

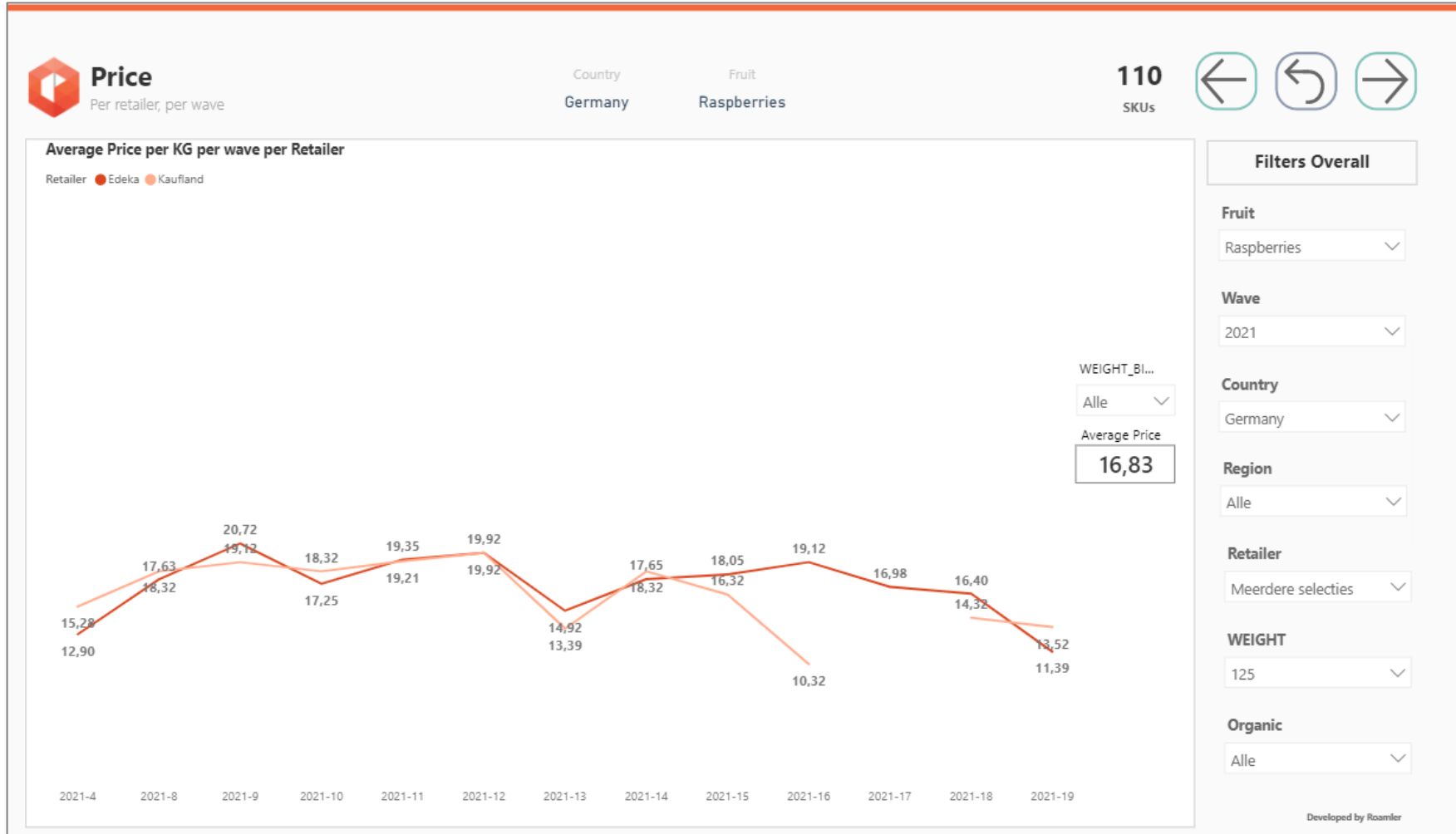


IN THE STORE

For any timeperiod of choice. Reading from left to right, how many different SKU's are found instore, which weight variation is there, at what price was it sold, who is the supplier and country of origin.



THE BERRY DASHBOARD

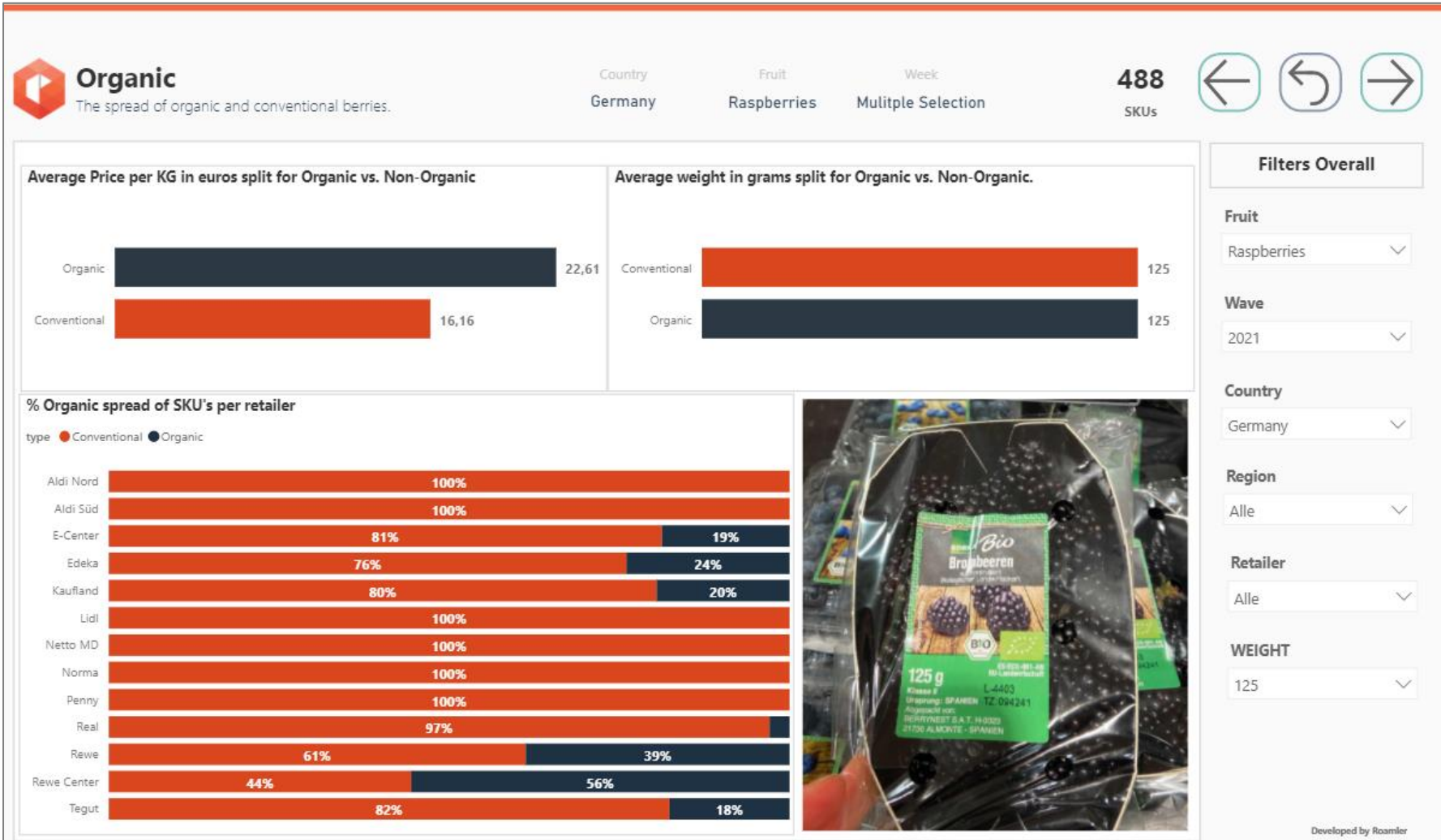


TREND ANALYSIS

Discover price development of a specific SKU. Compare retailers or suppliers with each other to help you understand margins and marketpotential



THE BERRY DASHBOARD



ORGANIC VS CONVENTIONAL

Analyze the development of Organic in a market or retailer. Is it growing or declining at a retailer, from who do they buy and how do retailers differ?



THE BERRY DASHBOARD



Country comparison

Spread of weight and price (Default average retail price) . Use the filters to deep dive. CTRL + select for multiple selection.

Country: Multiple Selection
Fruit: Blueberries

SKUs



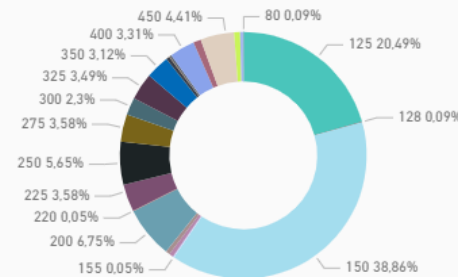
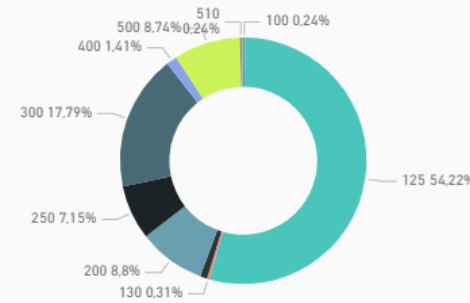
Price Retail | Price/Kg

Fruit: Blueberries | Country: Germany | Region: Alle | Retailer: Alle | Wave: Alle

0-100	100-200	200-300	300-400	400-500	500-600	600-800	>800
0,2%	64,2%	24,9%	1,4%	8,7%	0,2%	0,1%	0,1%
1,77	1,86	2,96	3,59	4,15	3,67	4,16	6,69

Fruit: Blueberries | Country: United King... | Region: Alle | Retailer: Alle | Wave: Alle

0-100	100-200	200-300	300-400	400-500	500-600	600-800	>800
0,1%	67,4%	15,2%	10,7%	6,2%	0,4%		
2,00	1,89	4,38	3,10	4,60	5,00		




Developed by Roamler

Country Comparison

Analyse the difference in assortment & price range between countries or specific retailers. How do they differ? What learnings can we derive?





THE BERRY DASHBOARD

 **Data table**

Country Fruit
Multiple Selection Multiple Selection

16K
SKUs

Fruit	Department	Country	Region	Retailer	Wave	#ID	Cool	Organic	Supplier	Weight	Facings	Price/KG	RetailPrice
Blackberries	België	Belgium	Nielsen 1	carrefour market	2020-45	14401717	IN	Non-Organic	Driscoll's	125		15,12	1,89
Blueberries	België	Belgium	Nielsen 1	carrefour market	2020-45	14401717	IN	Non-Organic	Berrydealer	125		15,12	1,89
Blueberries	België	Belgium	Nielsen 1	carrefour market	2020-45	14401717	IN	Non-Organic	Other	125		15,12	1,89
Red berries	België	Belgium	Nielsen 1	carrefour market	2020-45	14401717	IN	Non-Organic	Berrydealer	125		15,12	1,89
Blueberries	België	Belgium	Nielsen 3	carrefour market	2020-45	14398597	IN	Non-Organic	Driscoll's	125		15,12	1,89
Red berries	België	Belgium	Nielsen 3	carrefour market	2020-45	14398597	IN	Non-Organic	Unknown	125		15,92	1,99
Raspberries	België	Belgium	Nielsen 1	carrefour market	2020-45	14401717	IN	Non-Organic	Berrydealer	125		18,32	2,29
Blackberries	België	Belgium	Nielsen 3	carrefour market	2020-45	14398597	IN	Non-Organic	Driscoll's	125		18,32	2,29
Raspberries	België	Belgium	Nielsen 3	carrefour market	2020-45	14398597	IN	Non-Organic	Driscoll's	125		18,32	2,29
Mixed berries	België	Belgium	Nielsen 3	carrefour market	2020-45	14398597	IN	Non-Organic	Other	125		24,72	3,09
Strawberries	België	Belgium	Nielsen 3	carrefour market	2020-45	14398597	IN	Non-Organic	Hoogstraten	500		7,98	3,99
Blueberries	België	Belgium	Nielsen 3	carrefour market	2020-45	14398597	IN	Non-Organic	Other	500		11,98	5,99
Raspberries	België	Belgium	Nielsen 3	carrefour market	2020-45	14398597	IN	Organic	Other	125		31,92	3,99
Red berries	België	Belgium	Nielsen 2	Lidl	2020-45	14402931	OUT	Non-Organic	Berry Fresh	125	0,50	18,32	2,29
Strawberries	België	Belgium	Nielsen 2	Lidl	2020-45	14402931	OUT	Non-Organic	Private Label	500	1,00	7,98	3,99
Blackberries	België	Belgium	Nielsen 2	Delhaize SM	2020-46	14426142	IN	Non-Organic	Private Label	100			
Red berries	België	Belgium	Nielsen 3	Delhaize SM	2020-46	14420755	IN	Non-Organic	Private Label	100			
Red berries	België	Belgium	Nielsen 5	Delhaize SM	2020-46	14420428	IN	Non-Organic	Private Label	100			
Red berries	België	Belgium	Nielsen 2	Delhaize AD	2020-46	14471561	IN	Non-Organic	Private Label	100		17,90	1,79
Blackberries	België	Belgium	Nielsen 2	Delhaize AD	2020-46	14471561	IN	Non-Organic	Private Label	100		20,50	2,05

Fruit
Alle

Wave
Alle

Country
Alle

Region
Alle

Retailer
Alle

WEIGHT
Alle

TO EXPORT DATA:
Go to the top right of the table
> Click on the 3 dots "..."
> Export data
All the filters applied will be kept in the export

Developed by Roamlar

RAW DATA ACCESS

All store level data is organized in an easy to navigate table

Export the data and link it to your own internal data sources



THE BERRY DASHBOARD



Images

To find example images of berries, use the filters on the right side.

Country: Germany
Fruit: Raspberries
Week: Multiple Selection

40 SKUs



Uniqueld	PHOTO1	PHOTO2
15096612_FRUIT3_PRODUCT1	https://customer.roamler.com/image/C76F0F5-AB97-4F08-8978-326C0F846213	https://customer.roamler.com/image/198526U3-8E53-
15101974_FRUIT3_PRODUCT1	https://customer.roamler.com/image/85F1D852-A0A5-49E0-8773-7812D00F3396	https://customer.roamler.com/image/45F60CFA-667F-
15101974_FRUIT3_PRODUCT2	https://customer.roamler.com/image/540C1FEF-0A6C-48E6-A3D4-40729E72AB95	https://customer.roamler.com/image/8AA8C482-6580-
15132368_FRUIT3_PRODUCT1	https://customer.roamler.com/image/5EC08700-F88A-4691-A673-29797173E387	
15159815_FRUIT3_PRODUCT1	https://customer.roamler.com/image/FDA02928-10AC-45B6-9592-43210AA00918	https://customer.roamler.com/image/798286D0-5446-
15165874_FRUIT3_PRODUCT1	https://customer.roamler.com/image/215C36D2-3188-4CDE-948B-6D23A9107FF2	https://customer.roamler.com/image/73DA2888-76D9-
15165874_FRUIT3_PRODUCT2	https://customer.roamler.com/image/4ED4FF37-5804-4A23-A2F2-ACF5939C5DE0	https://customer.roamler.com/image/7401E647-A808-
15169553_FRUIT3_PRODUCT1	https://customer.roamler.com/image/11F7380F-806C-41D8-967F-35658D52A615	
15169555_FRUIT3_PRODUCT1	https://customer.roamler.com/image/8169D7C-5A54-49D9-98C6-F08F1DA6236C	https://customer.roamler.com/image/E3E81EB-3967-
15169555_FRUIT3_PRODUCT2	https://customer.roamler.com/image/37DAD384-51DB-4EAD-9500-888BE781437E	https://customer.roamler.com/image/88066809-EE8B-
15173933_FRUIT3_PRODUCT2	https://customer.roamler.com/image/7958D35C-9D22-4FE0-88CC-39E5CA4814C43	https://customer.roamler.com/image/438CDA3C-2806-
15194058_FRUIT3_PRODUCT1	https://customer.roamler.com/image/D2912037-7455-4AE3-9133-30CA77EC2CD6	https://customer.roamler.com/image/8D5D028A-62C4-
15195349_FRUIT3_PRODUCT1	https://customer.roamler.com/image/F6088513-5E86-4324-8782-9AF7D3F5C75A	https://customer.roamler.com/image/781C6C0F-DC1E-
15208733_FRUIT3_PRODUCT1	https://customer.roamler.com/image/CDECFD9E-9683-48A8-ADE8-528E3D16954E	https://customer.roamler.com/image/88263580-465C-
15208733_FRUIT3_PRODUCT2	https://customer.roamler.com/image/89B1D457-6422-480A-8A9D-CB40C836A5FC	https://customer.roamler.com/image/7D9E8E04-A86C-
15209887_FRUIT3_PRODUCT1	https://customer.roamler.com/image/0953E4E2-34AD-4761-B1CC-A29FC8A45178	https://customer.roamler.com/image/02D1F8ED-DC75-
15212118_FRUIT3_PRODUCT1	https://customer.roamler.com/image/315E8CE9-3CEC-4AFD-ADFE-9A2E6085A562	https://customer.roamler.com/image/6FA3BF85-E152-
15212118_FRUIT3_PRODUCT2	https://customer.roamler.com/image/6FD53EA6-7220-44C1-8945-FF10A5328870	
15258294_FRUIT3_PRODUCT1	https://customer.roamler.com/image/411F499F-6A27-4853-A4CC-3667D75CF9B3	https://customer.roamler.com/image/AA33EFE5-8E48-
15264978_FRUIT3_PRODUCT2	https://customer.roamler.com/image/1DD93E92-F34A-414C-B86C-C8867928AA48	https://customer.roamler.com/image/547AA9E8-2A55-
15265649_FRUIT3_PRODUCT1	https://customer.roamler.com/image/75941C89-7601-479D-8860-947AB960A84C	https://customer.roamler.com/image/A273AC8-BA0F-
15307718_FRUIT3_PRODUCT1	https://customer.roamler.com/image/E38DA38C-C9FD-4C39-8F5C-50FA2C5488A9	https://customer.roamler.com/image/93512808-2AC6-
15344191_FRUIT3_PRODUCT2	https://customer.roamler.com/image/7FCD0233-48BA-4E2F-B2BA-8669C3293A68	https://customer.roamler.com/image/C8CC48AE-B37A-
15348010_FRUIT3_PRODUCT1	https://customer.roamler.com/image/89C68528-5D88-4CE8-8EFD-E77D8A088641	https://customer.roamler.com/image/C4C6248D-40C0-
15357207_FRUIT3_PRODUCT1	https://customer.roamler.com/image/91161273-3DBC-421C-8DF7-E33A81E69A8	https://customer.roamler.com/image/51A826EC-E9AF-
15364786_FRUIT3_PRODUCT1	https://customer.roamler.com/image/E07FEF0C-8B04-4E84-8F2E-E699FA004948	https://customer.roamler.com/image/5FFE34C6-3A4C-
15371295_FRUIT3_PRODUCT1	https://customer.roamler.com/image/E793C595-FD99-4406-B480-D068621F7484	https://customer.roamler.com/image/8DB886FD-C644-
15374113_FRUIT3_PRODUCT1	https://customer.roamler.com/image/8817BD36-D0CE-41AC-995B-0A17776F1625	https://customer.roamler.com/image/199A3099-7251-
15391710_FRUIT3_PRODUCT1	https://customer.roamler.com/image/9D953437-09B4-4A4E-AAE6-487E6F6500CE	https://customer.roamler.com/image/79054A24-C918-
15403258_FRUIT3_PRODUCT1	https://customer.roamler.com/image/C1687921-1A7F-4249-A1CE-59784772C4C	https://customer.roamler.com/image/C481919E-FD87-
15495592_FRUIT3_PRODUCT1	https://customer.roamler.com/image/BD8E14C2-17A8-4511-8F52-E79490555AEF	https://customer.roamler.com/image/A557A759-3124-
15532634_FRUIT3_PRODUCT2	https://customer.roamler.com/image/A1188035-6CBA-4644-93F0-5ED803A206CE	https://customer.roamler.com/image/9645A206-8932-
15544702_FRUIT3_PRODUCT1	https://customer.roamler.com/image/21D2A03A-5CF3-440F-BDFE-26F3442D6566	https://customer.roamler.com/image/504A65DF-A8AB-

Filters

Fruit
Raspberries

Placed in/outside cooler
Alle

Wave
2021

Country of origin
Alle

Country
Germany

Organic
Alle

Region
Alle

Retailer
Kaufland

WEIGHT
125



PICTURE VIEW

All SKU & Store pictures available via dynamic filtering



TYPICAL BUSINESS QUESTIONS TO ANSWER WITH THE BERRY MONITOR

- What are the differences in assortment/ price range at different retailers/ countries?
- Can best practices in price & assortment be copied to other retailers, if I know the sales as well?
- When comparing with my sell-out data, how are my margins compared to those of the retailer?
- Are there any trends during the year where we can learn from in terms of price & assortment changes
- What is my distribution development
- What is my share of assortment vs competition?
- What is the price difference between organic & conventional in different markets?
- What is my numerical distribution throughout the year? Where are opportunities for me?
- Which competitors are growing?
- What is the 'country of origin' development over time? Are retailers buying more local, or more import?
- Which suppliers deliver to the same retailers we deliver to? What trends can we identify there?
- Help to understand supplier network in case of a claim. Who supplied the produce?





USER CASE: FROM INSIGHTS TO ACTION

A better understanding of the dynamics of the market will help you improve your offering, identify opportunities & grow your sales




USER CASE

Exporter/ Brand: Distributing berries across Europe at different Retailers

Challenge: With limited data available, the client has little knowledge on the dynamics in the market. The retailer itself knows what's happening instore, meaning that often we come to negotiations with a disadvantage in knowledge.

Questions: how do assortment & price develop at a retailer, when comparing it with our own margins. Can we spot opportunities to invest and grow the category?



Solution: The Berry monitor in combination with our sell-out data has shown that margins for us and the retailer have grown. This means we that we have more budget available to invest in the category. This insights and advice towards a retailer had contributed to the retailer's perception of us being a good partner





15
Markets
directly

4M+
Tasks per year

8
OFFICES
IN EUROPE

267
TEAM MEMBERS
EMPLOYED

380k
ACTIVE
WORKERS
ON-DEMAND

450+
MULTI-COUNTRY
PROJECTS

Global
coverage

350+
CUSTOMERS

12
INDUSTRIES
SERVED



THE NEW APPROACH TO FIELD MARKETING

Dividing activities and assigning them to local experts on-demand

SPLITTING JOBS INTO SMALLER TASKS

FOR A FLEXIBLE WORKFORCE TO EXECUTE





Chris Rijnhout

LET'S STAY CONNECTED

Christiaan.rijnhout@roamler.com

+31 6 82800186