Leveraging digital and strengthening our commercial capabilities to serve better, grow faster and improve margins

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Carlsberg Group

# Delivering our vision – from foundation to scalable innovation

IT digital foundation is the launchpad that makes Carlsberg faster, smarter and more productive - fueling Accelerate SAIL

OUR IT VISION

"Be a trusted partner to empower a **better, faster and more productive** Carlsberg by delivering on the promise of technology and data"

HOW IT'S ENABLED

A robust digital foundation & value-driven model

Optimise

Reinvest

ACCELERATE SAIL

FOUNDATIONAL CAPABILITIES

VALUE FRAMEWORK

DIGITAL ACCELERATORS

Innovate
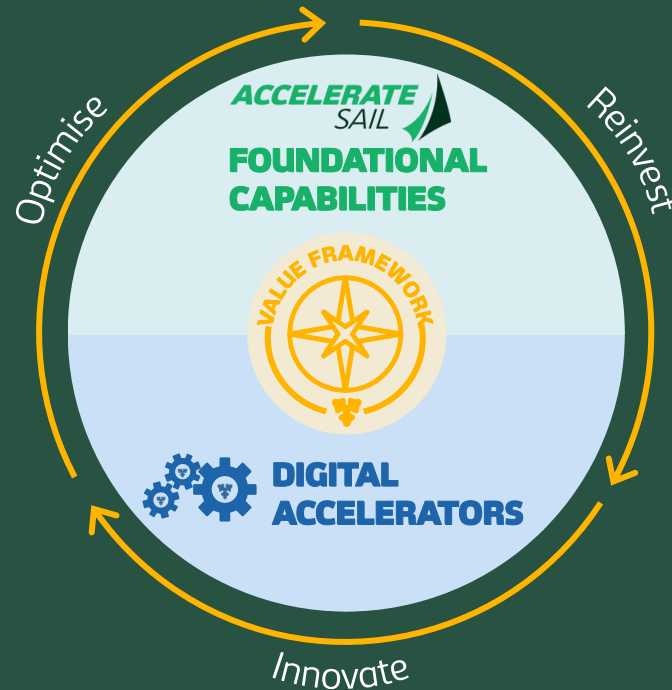
WHAT IT MEANS FOR CARLSBERG

- **Accelerate growth**
  Launch new digital products and commercial platforms faster and more efficiently

- **Drive smarter operations**
  Leverage trusted data for real-time supply chain visibility, predictive maintenance, and smarter manufacturing excellence

- **Enable AI and Advanced Analytics**
  Unlock the potential of our data to create a significant competitive advantage through data-driven decision-making

- **A more agile Carlsberg**
  Respond faster to market changes, integrate acquisitions seamlessly, and empower our teams with better tools and data

2

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Our digital accelerator flywheel for growth

Carlsberg has built a powerful engine for transformation

The flywheel accelerates our ability to strategically reinvested into building this modern digital foundation, layer by layer...
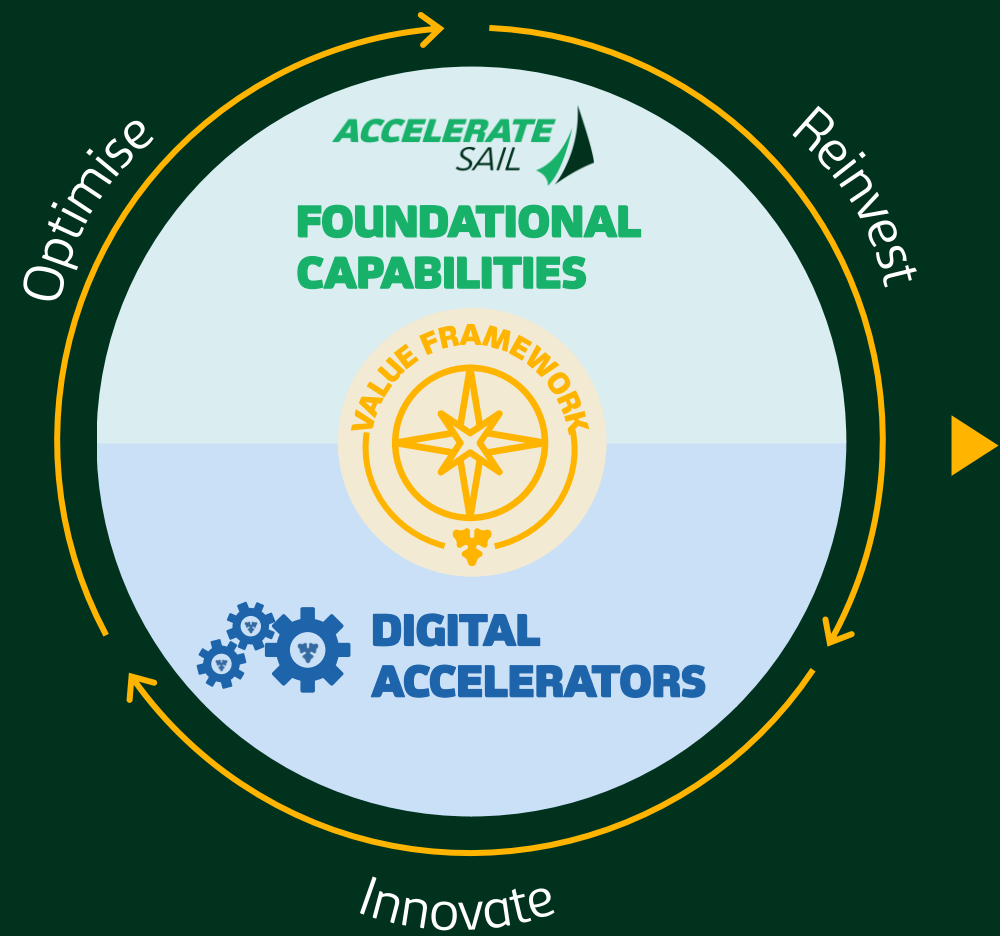
ITSM foundation
Enhancing IT processes to create a more stable, reliable, and efficient service delivery model - the bedrock for all other layers

CLOUD foundation
Accelerating migration to a modern, scalable, and secure cloud platform, enabling us to build and deploy new capabilities with greater speed and agility

INTEGRATION foundation
Building a new, more modern, seamless 'connective tissue' between our core systems, unlocking data flow and enabling AI & Automation at scale

DATA foundation
Consolidating a 'single source of truth' for our data, enabling advanced analytics, business intelligence, & data-driven decision-making globally

AI and DIGITAL platforms
Launching modern platforms that use this foundation to drive revenue and strengthen our competitiveness even further

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IT global capability center: a talent engine for scale

Successfully migrated from a model limiting growth to a new engine for value

Pivoting our operational priorities

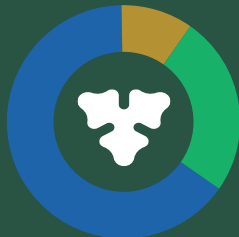Operational services are becoming more automated and commoditised

- 94% of IT workforce previously in high/medium-cost locations
- IT faced an impending 20% cost increase from vendors

Our workforce profile

Industry best practice

≠

- High-cost locations
- Medium-cost locations
- Global-cost locations

- High-cost locations
- Medium-cost locations
- Global-cost locations

This meant less funding for strategic growth and limited IT's ability to innovate

Taking decisive control

A deliberate, three-pronged approach to take more control:

Took back control of our services & costs

Built with speed using a build-operate-transfer model

Engineered for efficiency with a zero-based design to right-sized team from day one

A new engine for value and growth

This transformation has delivered immediate financial value and created the foundation for future innovation

- ✓ Capability center is LIVE
- ✓ Experts are mobilised
- ✓ Cost avoidance has been secured

This foundation is empowering IT to drive growth, accelerate delivery, and foster innovation across the enterprise

ECHOBASE TALENT ENGINE

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Digital backbone: connected platforms for growth

The strategic blueprint to deliver a seamless platform has been created

Our digital nervous system

To make the most out of our technology investments, we need to enable seamless, secure data flows at every level

Enterprise-wide Integration
Replacing 1,500 point-to-point integrations to lower costs and operational risks

Speed-to-market
Adopt a consistent standard to reduce average integration time and costs

Reusability & visibility
Eliminate duplication of effort and create a central view of our landscape with real-time performance insights

A centralised, modern platform

Establish a governed, reusable integration platform using Azure for agility, SAP BTP for core process expertise and solace to enable real-time data insights
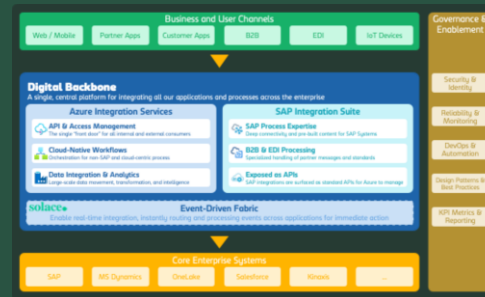
Increase speed & agility
Accelerate project delivery and enable new digital models

Real-time data Insights
Empower business with live data to drive pro-active insights

Make the most of our ERP investments
Maximize connectivity & interoperability to fully utilize the capabilities of our ERP platforms

Improve resiliency
Build a stable, modern foundation to support future business growth and supply chain excellence

Our roadmap & execution model

Mobilize a centralised "Integration Factory" to deliver high-quality, reusable assets consistently, turning IT into a strategic business enabler
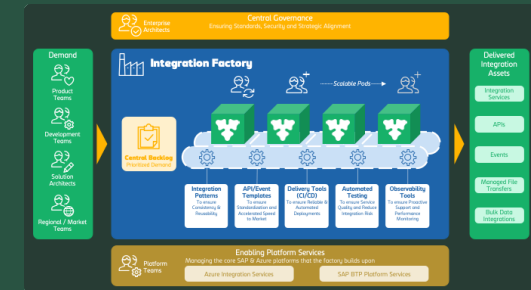
Build the foundation (by 2025-2026)
Deliver the core platform, establish the central integration catalog, and prove value with pilot projects

Scale & federate (by 2026-2027)
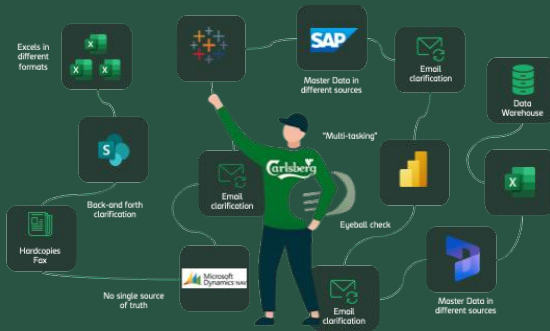Drive adoption as the default standard, achieve efficiency gains, and empower business units

Innovate & lead (2027+)
Enable a hyper-agile supply chain, unlock new revenue, and achieve integration excellence

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One Lake: a data marketplace for trusted data and insights

A unified data foundation to transform data from a cost center into a growth driver

We have a lot of data

We run on insights, not just data
Carlsberg is rich in data sources; connecting all of these data sources opens new opportunities to generate more insights to drive data-driven decision making
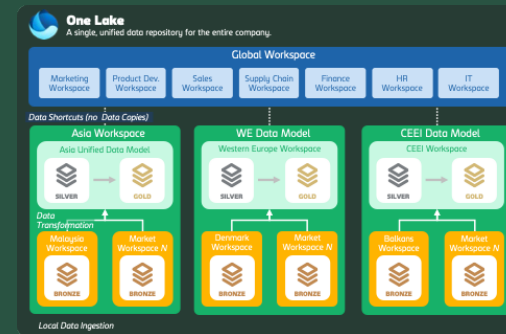
Connected to our AI & digital platforms
Foundational capabilities such as OnePlan, OneOT, VMx not only provide value, but also create new opportunities for enriching our core data and gaining more insights into our business

Always expanding and enriching
Continuously adding new sources to create even more opportunities to generate insights that enhance competitiveness

Building a robust data foundation

Build once, use everywhere
Create a single, governed data foundation on one modern platform

Business-driven strategy
Embed data development into existing, funded projects within Accelerate Sail. This is not a separate IT project

Ride the wave
Our roadmap is the business's roadmap. We prioritise domains based on the most critical transformation initiatives

Standardise the core
Consolidate shared data to drive efficiency, while empowering markets with flexibility for local needs

Growth through accelerated insights

Accelerate decisions
Reduce time-to-insight from months to days, enabling faster response to market opportunities

Reduce costs
Decommission legacy platforms and eliminate redundant work, driving significant operational savings

Enable innovation
Create the foundation needed to scale AI, predictive analytics, and other growth initiatives

Mitigate risk
Improve data security, governance, and quality through a centralised, modern platform

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FILM (one lake)

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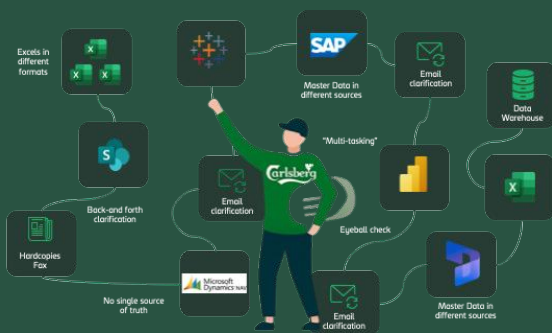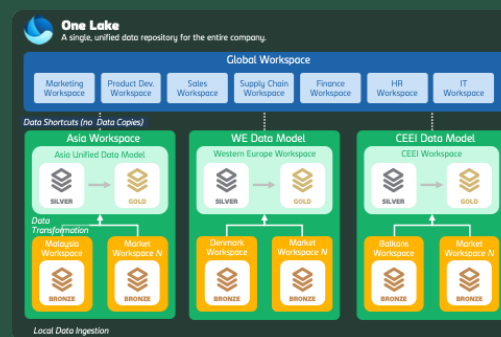Create the foundation needed to scale AI, predictive analytics, and other growth initiatives

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Improve data security, governance, and quality through a centralised, modern platform

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Enabling our commercial bets to drive growth

Digital accelerators is enabling the 3 bets of commercial capabilities placed as part of Accelerate Sail

DIGITAL COMMERCE

Introducing LBC Servd: our new EB2B ordering
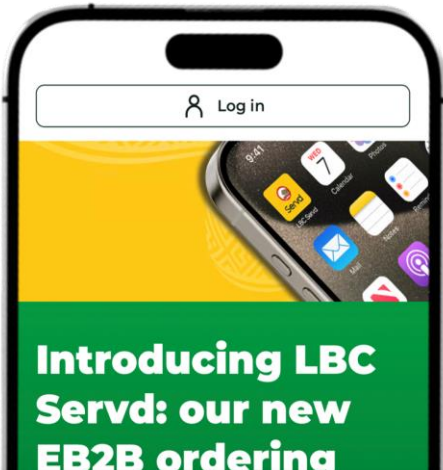
Enhancing our sell in & sell out engines

SALES EXECUTION

ACCELERATE
FIT

Maximising execution excellence

VALUE MANAGEMENT

VMx

Enabling sustainable growth through precision

POWERED BY DIGITAL ACCELERATORS

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Digital commerce

ENHANCING OUR SELL-IN ENGINES
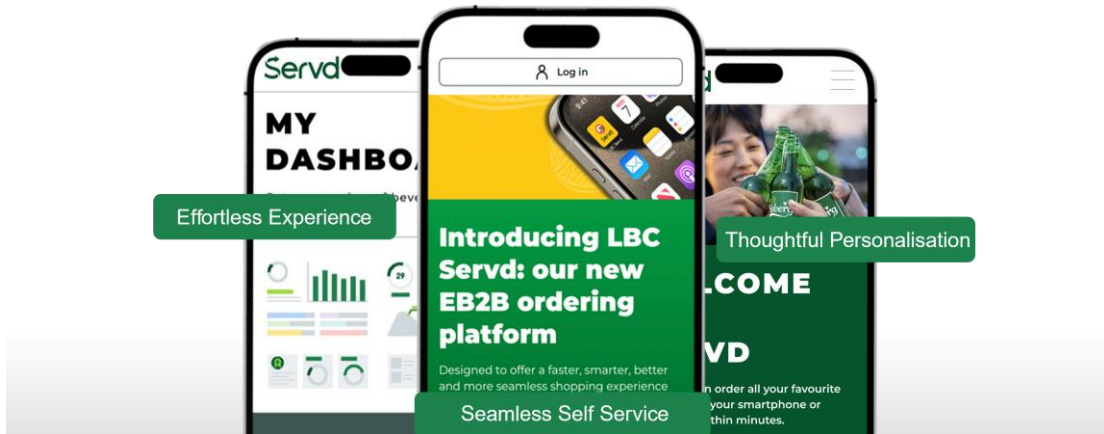
- Launching "Servd" – Our next-generation digital platform
- Seamless, end-to-end experience, & enhanced capabilities
- Driving higher engagement, order value, & retention

ACCELERATING OUR SELL-OUT ENGINES

Meituan, Grab, & Foodpanda

- Partnering with lifestyle platforms of tomorrow
- Unlocking new sources of incremental growth
- Shifting seamlessly to where consumers shop

Introducing

GEN AI

Servd

Your eB2B growth partner powered by innovation and a passion for service.

Built with leading technology partners on a modernised tech stack unleashing an expandable growth platform.
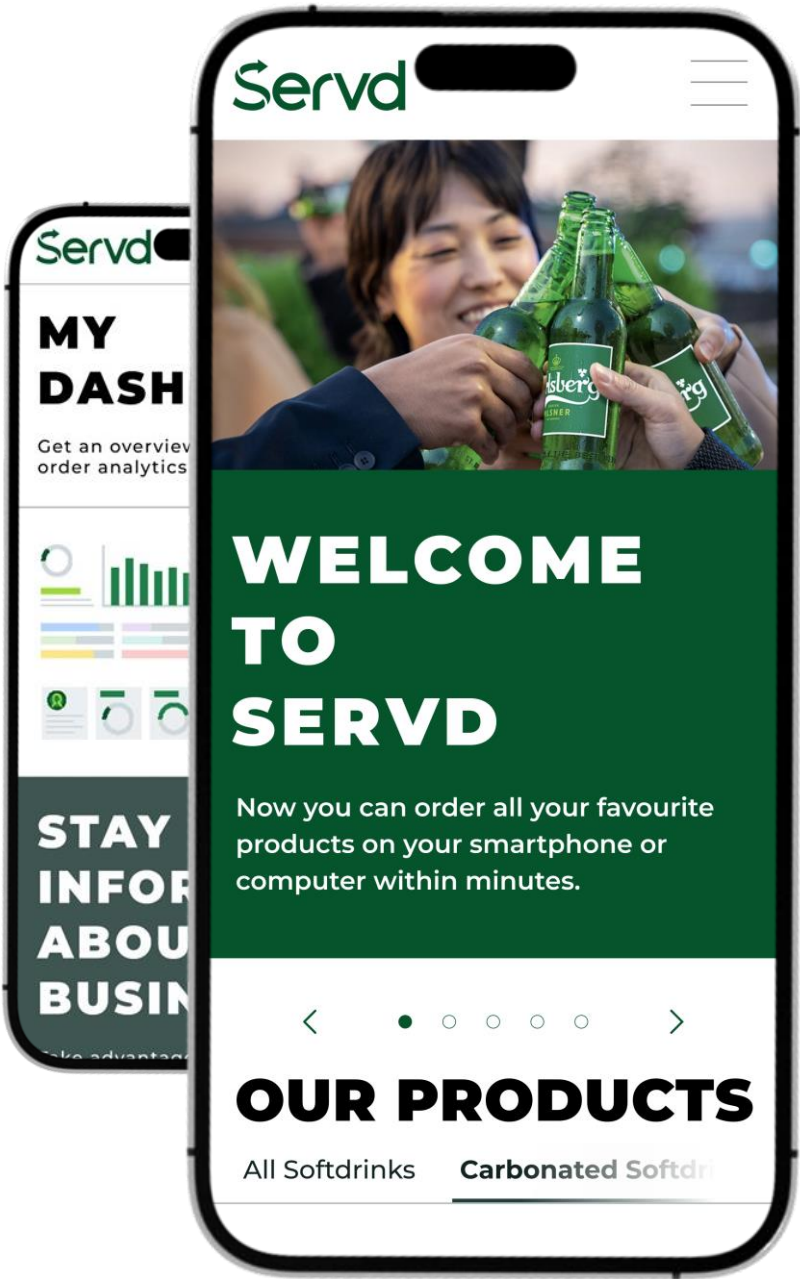
1 Effortless experience

2 Seamless self service

3 Thoughtful personalisation

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FILM (Servd)

Sales execution

10 YEARS OF EXECUTION FOUNDATIONS

From: A well-established, company-wide program with a decade of success driving availability, visibility and conversion at the point of purchase

ACCELERATING FIT VIA DIGITAL

To: Digitally enabling our FIT program to unlock faster decisions, smarter execution and scalable growth across omni channels

Digital tools to accelerate FIT

Gen AI enabled tools to accelerate growth opportunities

1

TECH ENABLING FRONTLINE TEAMS

Replacing legacy field sales tools, with Gen AI enabled tools

2

DIGITAL MEASUREMENT OFFLINE & ONLINE

AI powered image recognition now live in 29 markets

3

GLOBAL TO LOCAL INSIGHTS VIA ONE METRIC PORTAL

Centralised execution data to unlock growth

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GEN AI

SALES COACH

A Gen AI powered sales assistant
that unleashes to full potential of our sales reps

A fully customised salesperson effectiveness tool, powered by GenAI, that integrates structured & unstructured data to provide tailored insights that enhance sales rep performance and delivers growth

Current pilot

~1,000 sales reps

Performance Hub

Call Compliance
Month target
90%

Sales Volume Target Achiev
2470HL   MTD target
              717HL

Focus Volume Target Achiev
Premium
Month target   MTD target
80HL   23HL

FIT Score
Month target
90%

Nguyen Quan

Outlet Insigl

Sales Perfo

Focus SKU F

Fit Score Da

Contract Co

What is the Focus S this month?

Your Focus S only. To be e VND, sell 47H days

View ch

Hey Thau, How can I help you

How am I pe targets for th

You have achieved 4 target with 1111 HL sq October.

Type a new message

My Route Insights

Total visits today   >

7 Outlets

| Outlets with 0 orders | 3/7 | Outlets with 0 stocks | 2/7 |
| Lapsed Outlets | 0/7 | Lost Outlets | 1/7 |

Volume to sell today   22 days to go

Overall   Focus
75HL   47HL

Key promotions

Mix 10 Ket Premium tang 01 Ket Premium theo chuan   >
Mua 06 Keg tang 01 Keg tuong ung

Key actions for the day

1. **Horizon and Min Hang have no stock** available. Prioritize placing orders immediately to avoid lost sales. Confirm order placements with store managers before leaving.

Route Insights

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FILM (Sales coach)

One metric portal

A one stop shop for sales execution data unlocking opportunities and growth

GEN AI

GLOBAL TO STORE LEVEL

29 MARKET COVERAGE

MULTI EXECUTION DATA SOURCES

E.g. image recognition, digital shelf, asset management

COMMERCIAL OPERATIONS INTEGRATION

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Versus Last Month: No Comparison   Above   Below

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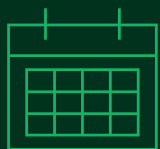# We are building leading value management capabilities
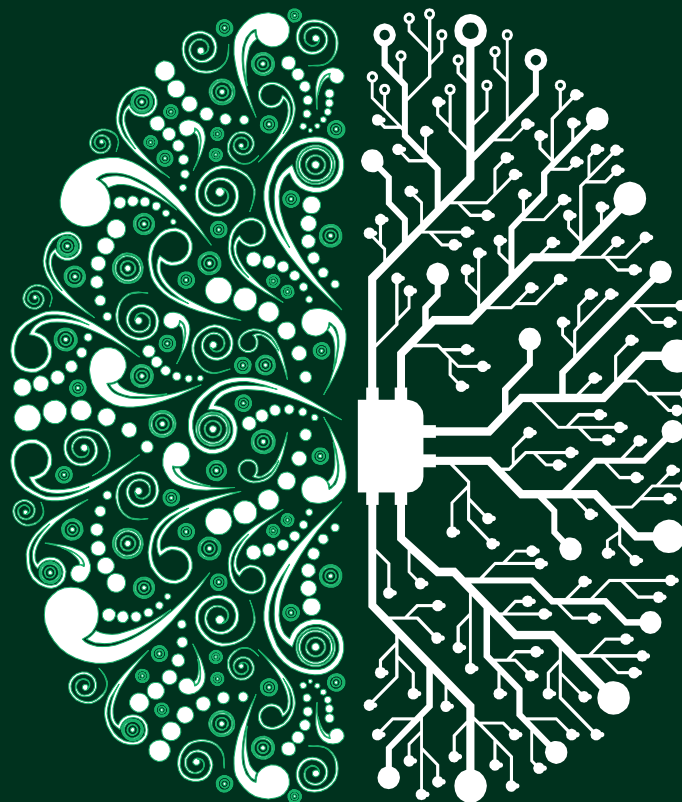
Operating model

- Resources and skills
- Governance model and processes
- Commercial integration

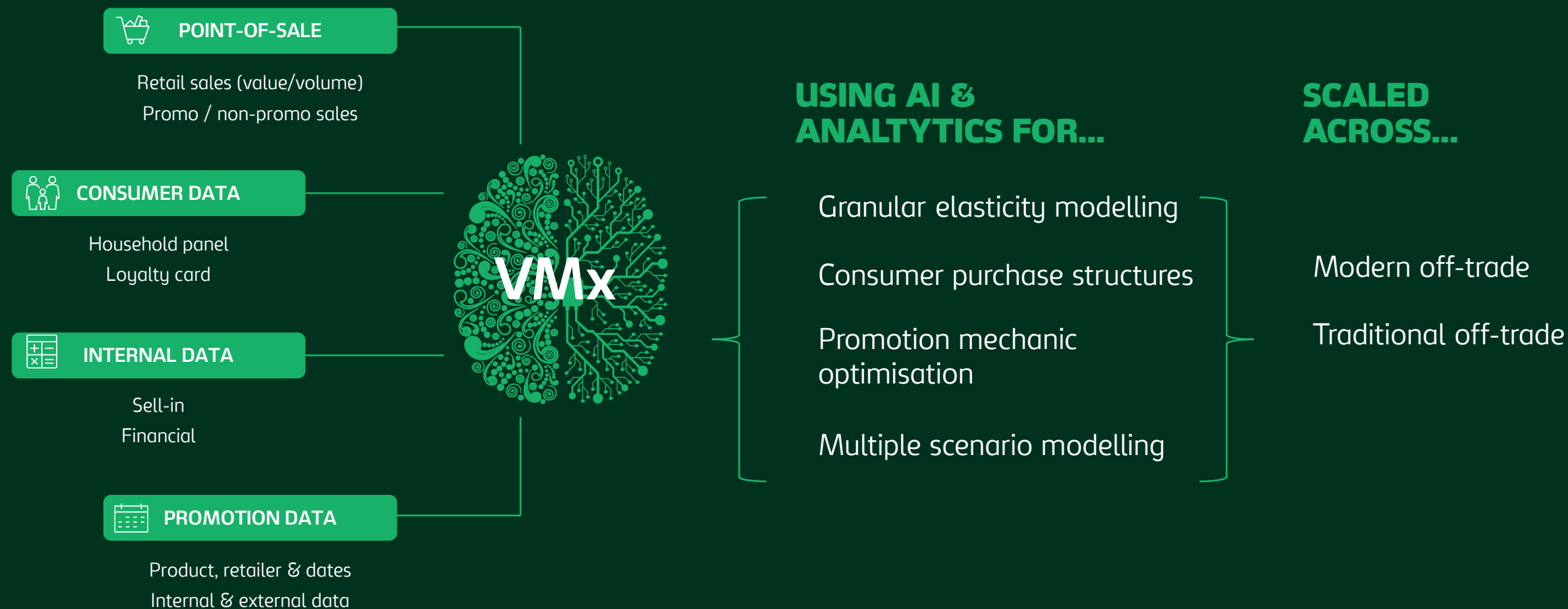## Insights & analytics

- Beyond Excel with cloud-based solution
- Based on consumer behaviour
- Integrate price, promo and assortment analytics

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Combining data sources with AI to improve gross margins

POINT-OF-SALE

Retail sales (value/volume)
Promo / non-promo sales

CONSUMER DATA

Household panel
Loyalty card

INTERNAL DATA

Sell-in
Financial

PROMOTION DATA

Product, retailer & dates
Internal & external data

VMx

USING AI & ANALTYTICS FOR...

Granular elasticity modelling

Consumer purchase structures

Promotion mechanic optimisation

Multiple scenario modelling

SCALED ACROSS...

Modern off-trade

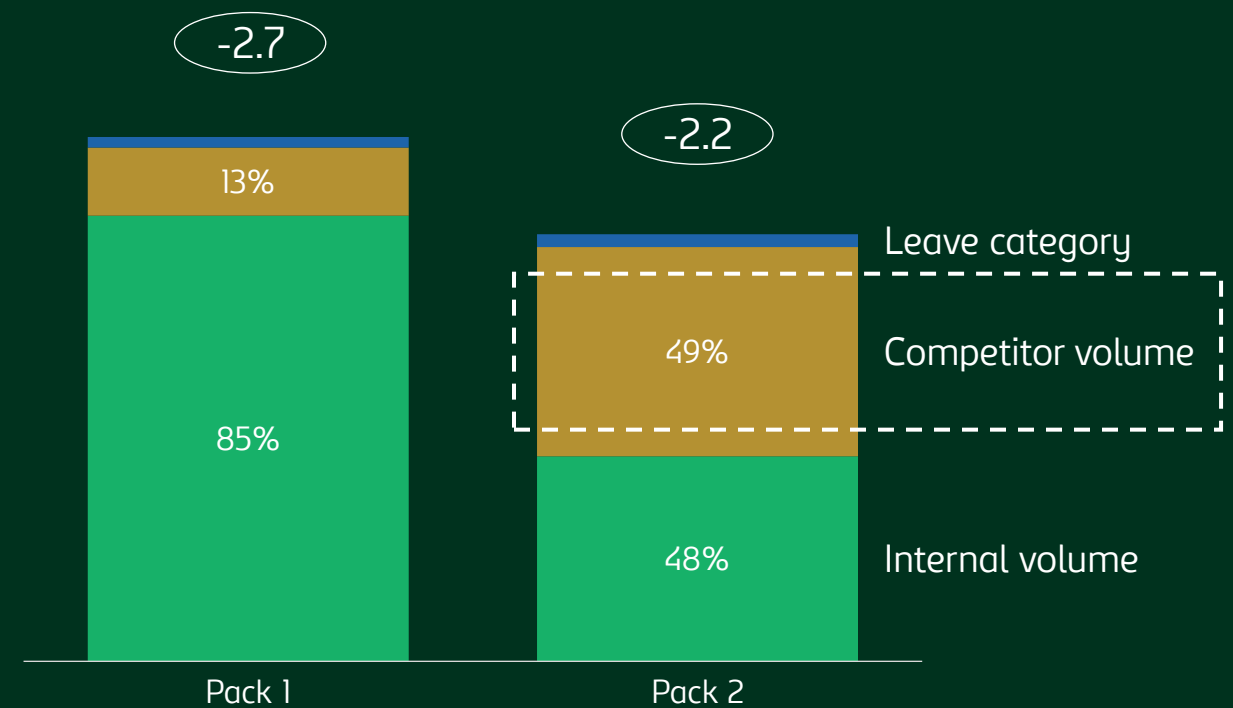Traditional off-trade

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Utilising VMx to optimise price
Same brand, different packs

From gross elasticity:
No volume sourcing understanding
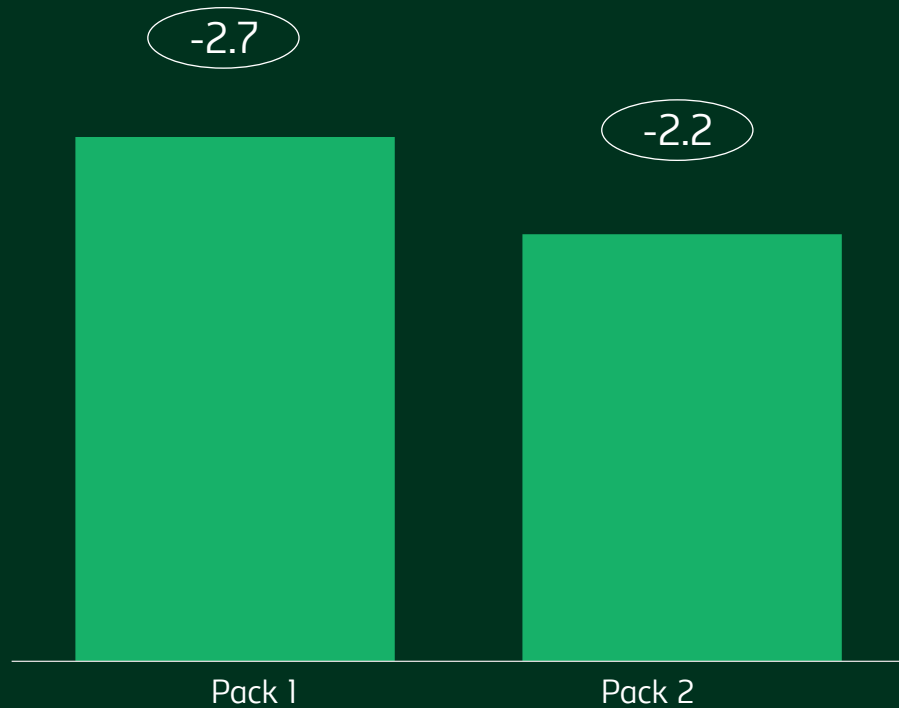
To net elasticity:
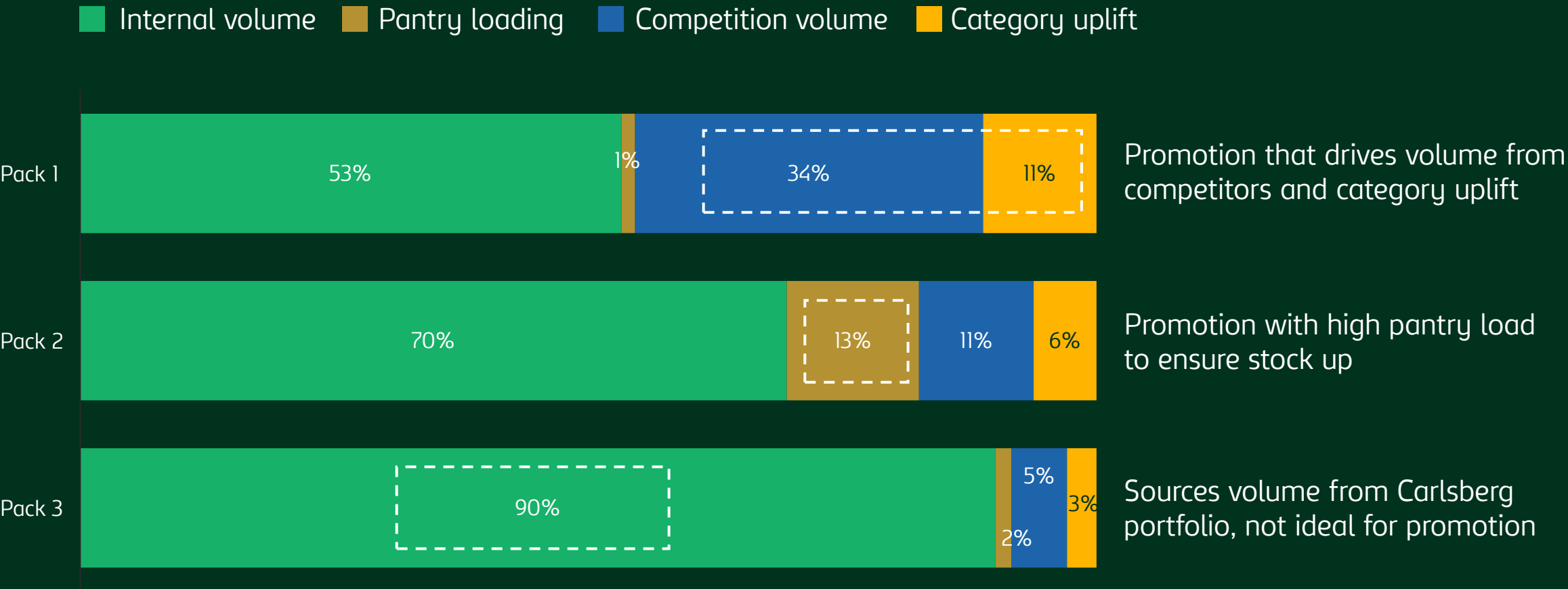Volume sourcing modelling
– Pack 2 gain volume from competitors

-2.7

-2.2

-2.7

-2.2

13%

85%

49%

48%

Leave category

Competitor volume

Internal volume

Pack 1

Pack 2

Pack 1

Pack 2

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Utilising VMx to optimise promotions
Same brand, different packs

■ Internal volume ■ Pantry loading ■ Competition volume ■ Category uplift

Pack 1
53% | 1% | 34% | 11%

Promotion that drives volume from competitors and category uplift

Pack 2
70% | 13% | 11% | 6%

Promotion with high pantry load to ensure stock up

Pack 3
90% | 2% | 5% | 3%

Sources volume from Carlsberg portfolio, not ideal for promotion

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KEY TAKE-AWAYS
Accelerating our capabilities

**Accelerating growth
through digital transformation**

1.

**Modernising our
digital backbone**

Building the foundation for
stronger commercial
capabilities and growth

2.

**Scaling AI and
Advanced Analytics**

Converting data into faster,
sharper decisions that drive
growth, into our commercial
routines

3.

**Driving growth through
digital commerce**

Making digital channels
a core engine for revenue
growth and customer /
consumer engagement

4.

**Powering value
management with
technology**

Optimising pricing, mix, and
promotions to unlock
profitable growth

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