

# Chocolate Sales Report

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## Executive Summary

This report analyzes chocolate sales data from **February 2023 to February 2024** to uncover key trends, top-performing products, salespersons, and regions. The analysis was conducted in **Power BI** using DAX measures, time intelligence functions, and interactive visualizations.

Key insights:

- **Total Sales:** \$34.0M, peaking in **December 2023** (\$2.94M), lowest in **November 2023** (\$2.28M).
- **Top Product (Sales):** Organic Choco Syrup – \$2.11M.
- **Top Product (Profit):** Peanut Butter Cubes – \$1.77M.
- **Top Salesperson:** Kelci Walkden – \$1.52M.
- **Most Profitable Region:** New Zealand – \$5.88M.
- **Overall Profit Margin:** 60.3%.

Seasonal patterns show strong holiday performance in December and weak sales in November, offering opportunities for targeted campaigns.

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## Project Overview

The goal of this project was to analyze chocolate sales data and provide actionable insights for sales and marketing. Key objectives included:

- Tracking KPIs across sales, costs, profit, and shipments.
  - Identifying top-performing products and categories.
  - Highlighting best-performing salespersons and regions.
  - Recommending strategies to boost revenue and efficiency.
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## Data Preparation

- **Data Source:** Sample chocolate sales dataset (Feb 2023 – Feb 2024) from [Chandoo](#)
    - Tables: Products, Shipments, People, Locations, Calendar
    - [Dataset link](#)
  - Imported into Power BI and cleaned in Power Query Editor.
  - Adjusted data types for accuracy and consistency.
  - Added custom date fields (month, quarter, year) to Calendar table for time intelligence analysis.
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## Data Modeling

- Reviewed and adjusted relationships between fact and dimension tables.
  - Created missing relationship between **Shipments** (fact) and **Calendar** (dimension).
  - Marked Calendar as the Date table to enable time intelligence.
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## Analysis & Visualization

### Sales Performance

- **Total Sales:** \$34.0M
- **Peak Month:** December 2023 – \$2.94M
- **Lowest Month:** November 2023 – \$2.28M
- **Trend:** Drop in April, recovery in May, steady June–September, rise in October, dip in November, strong peak in December, decline in early 2024.

### Top 5 Products by Sales

1. Organic Choco Syrup – 2.11M
2. Peanut Butter Cubes – 2.03M
3. 99% Dark & Pure – 1.98M
4. Manuka Honey Choco – 1.84M
5. Fruit & Nut Bars – 1.83M

## Top 5 Salespersons by Sales

1. Kelci Walkden – 1.52M
2. Rafaelita Blaksland – 1.50M
3. Husein Augar – 1.47M
4. Dotty Strutley – 1.42M
5. Oby Sorrel – 1.40M

## Sales by Region

- New Zealand – 5.88M
  - Canada – 5.73M
  - Australia – 5.70M
  - USA – 5.62M
  - India – 5.65M
  - UK – 5.47M (lowest among regions)
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## Costs

- **Total Costs:** 13.5M
  - **Peak Months:** May 2023 – 1.11M, January 2024 – 1.15M
  - **Lowest Month:** April 2023 – 0.91M
  - Costs follow a similar trend to sales, spiking during high-demand periods.
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## Profit

- **Total Profit:** 20.5M
- **Profit Margin:** 60.3%
- **Peak Month:** December 2023 – 1.83M
- **Lowest Month:** November 2023 – 1.30M

## Top 5 Products by Profit

1. Peanut Butter Cubes – 1.77M
  2. 99% Dark & Pure – 1.46M
  3. Manuka Honey Choco – 1.45M
  4. Smooth Silky Salty – 1.45M
  5. Orange Choco – 1.42M
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## Boxes Sold

- **Total:** 2.08M
  - **Peak Months:** May 2023 – 174.7K, October 2023 – 176.9K
  - **Lowest Month:** February 2024 – 142.8K
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## Shipments

- **Total Shipments:** 6,113
  - **Peak Month:** December 2023 – 529
  - **Lowest Month:** April 2023 – 425
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## Limitations

- **Sample Size:** Dataset is relatively small.
  - **Simulated Data:** Clean and structured, but lacks irregularities of real-world business data.
  - **Missing Customer Data:** No demographic or behavioral information available.
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## Recommendations

### High Priority

1. **Product Strategy**
  - Promote high-profit items such as Peanut Butter Cubes and 99% Dark & Pure.
  - Bundle slower-moving products with best-sellers to increase basket size.

## 2. Seasonal Campaigns

- Build on December holiday spikes with targeted promotions.
- Address November dips through early holiday campaigns and pre-sales.

### Medium Priority

## 3. Regional Focus

- Use New Zealand and Canada (top regions) as test markets for premium launches.
- Investigate UK's underperformance with targeted regional strategies.

## 4. Operational Efficiency

- Optimize shipping costs in peak demand months to protect margins.

### Long-Term

## 5. Data Enrichment

- Integrate customer demographics, purchasing behavior, and promotional data.
- Track marketing ROI to better link campaigns with sales performance.

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## Conclusion

The analysis reveals **clear seasonal patterns, profitable product lines, and regional opportunities**. December consistently outperforms, while November shows vulnerability. Leveraging these insights could help improve product targeting, optimize regional strategies, and strengthen operational efficiency.

Future work with richer, real-world datasets would enable deeper insights and could help businesses improve margins by an estimated **5–10%** through better product and campaign alignment.

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