FOOD FOR THOUGHT

25 Country Reports
In Europe and North America

FFT's Annual Country Reports offer a complete hard data food & drink markets compilation of demand and supply running to some 800 - 1000 pages

Food & Drink
Strategic Information Services

Country Report

Illustrative commented tables for:

Switzerland

PRINTED REPORTS

All FFT online reports can be printed and photo-copied recto-verso to produce a complete report.

Try printing this Periscope !

SAMPLE REPORT
Note: Illustrative Data Only Presented

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FOREWORD

PRINTING YOUR REPORT

Print: Print the pdf copy of your report and ensure no "extra" white pages were inserted by your printer.
Photocopy: Photocopy the report recto-verso and insert it into a ring-folder.
Result: A complete report, including cover page, table of contents and correct left/right presentation of two-page tables (hence the occasional numbered blank pages in your report to

PRINT YOUR REPORTS

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Common definitions are applied to all country & product markets.

OVERALL DEFINITIONS

General: Market data refer to all products sold for **final** **human** **consumption** in retail, foodservice and artisanal markets (own-produced for own sale, e.g. independent bakers), thus excluding industrial and intermediate consumption, and auto-consumption.

Product: All product markets are carefully defined so as to be comparable across all countries. Special cases in a few country and product markets are specified.

Prices: Retail prices (including VAT, excise and other indirect taxes) and foodservice buy-in prices are applied throughout.

Retail and foodservice buy-in prices are applied throughout.

METHODOLOGY

All countries are surveyed in the field regularly, during which extensive company and other interviews are carried out. FFT also systematically gathers all publicly available data (from trade associations, government institutions and publications, the press and other media). The definition above (final human consumption) ensures that there is no double-counting among product markets. In turn, this enables comparisons across all country/product markets on a per capita or unit value or real growth basis, and allows all data to be summed by product, by country, or by category, allowing extensive cross-checking for verisimilitude.

There are NO data gaps !

FULL COVERAGE

There are NO gaps. Volume, Value and Company Market Share data are provided for ALL country and product markets. FFT provides its own carefully assessed estimates in the absence of any available data source.

DATA COLLECTION PRINCIPLES

Since the 1990 1st edition, FFT has developed a "fail-safe" methodology as far as possible to gathering data.

1- **End-Use Definition:** Final Human Consumption (see above). This ensures NO double-counting and that any and all data can be added up.
2- **Wide Coverage:** All demand & supply - including retail, foodservice and direct supply - provides a fixed frame into which all elements must fit in a logical manner.
3- **The 100% Rule:** Company market shares must add up to no more than 100%, and wide coverage means that all significant supplier market shares must be fitted in, squeezing many company claims!
4- **Cross-checking:** To ensure verisimilitude, extensive country comparisons are made of per capita consumption and expenditure, real growth rates, etc., and against 10-year historical trends. Data "outliers" are singled out, and if necessary re-checked in the field.
5- **Critical Review:** All publicly available data - the trade press, associations, government surveys, etc., are exhaustively collected & collated, and many amended or rejected, applying the above principles.
6- **Original Sourcing:** Extensive field surveys, company interviews and store checks are carried out every year, and all data is "fitted" to a realistic overall picture of total supply and demand.
7- **Software:** Complex, internally-developed computer programs provide a unique dynamic interlocking data grid.
8- **Russian Doll:** Internal consistency and coherence is provided by data adjusting automatically to data changes elsewhere.
9- **Client Feedback:** Continual improvements are incorporated in each annual edition at clients' suggestions and remarks, thus fine-tuning the database to market realities.
10- **Strategic View:** Presentation techniques favoring a global vision of food & drink markets are systematically applied.

146 Product Folios
A country report contains 146 4-page "Product Market Folios" such as illustrated here.

Market Summary
of:
- Major Suppliers
- Retail and Foodservice
- Distribution Channels

ICE CREAM IN SWITZERLAND
Summary

MAJOR SUPPLIERS IN 2008 *

Unilever	Nestlé	Migros	All Other Companies
30.0%	20.4%	16.3%	33.2%

MARKETS IN 2007

Up-To-Date
Online data is continously updated, for example regarding M&A activity.

Total Demand
Euros 323.2 million

Complete Demand Picture
(of <u>all</u> human consumption):

- **Retail Markets** including Artisanal (own made for own sale such as bakers) and
- **Foodservice Markets**

2007 Retail Market	2007 Foodservice Market
Euros 171.8 million	Euros 151.4 million

Distribution Channels
The four sales channels add up to 100%.

Branded	Unbranded	Own Label †	Artisanal #
69.8%	0.0%	26.2%	4.0%

Branded Vs Own Label
The inroads made by distributor brands are carefully monitored.

Notes:
* Continuously updated, especially regarding recent major mergers and acquisitions.
† Retail distributor brands
# Artisanal: Own-produced for own sale, for example independent craft bakers, or family ice cream parlours in Italy, considered here to be a single competitive entity/company).

Note: Illustrative Data Only Presented

COMPLETE RETAIL, FOODSERVICE AND TOTAL DEMAND BY VOLUME AND BY VALUE PROVIDED!

9.1 ICE CREAM IN SWITZERLAND

Country: Switzerland — Main Process Family: Dessert

25-Country and Regional Forecasts Provided

Product: Ice Cream — **t Conversion Factor †:** 0.75

Forecast *: World 2007-2012 average annual real 1.1%, with 1.0% in Western Europe

Definition: Dairy/non-dairy ice cream and sorbets, industrial and artisanal (including estimates of underrecorded artisanal), soft ice.

Full product definitions provided.

FFT estimates the % size of foodservice markets to derive a unique one-year "panorama" of retail & foodservice

DEMAND DATA **

	Volume (million litres)			% Share	Consumption per Capita in	Average Annual % Growth ††
	2002	2006	2007	2007	2007 (litres)	2002 - 2007
Retail Market:	-	-	25.2	44.9%	3.36	-
Foodservice Market:	-	-	30.9	55.1%	4.12	-
Total Market:	**54.0**	**55.4**	**56.0**	**100.0%**	**7.47**	**0.5%**
Other Countries:	10,134.2	9,963.1	10,053.1		10.76	-0.3%
World * :	10,188.2	10,018.5	10,109.2		10.73	-0.3%
% Country Market:	*0.5%*	*0.6%*	*0.6%*			

World (25 countries*) totals provided to help assess market potential.

UPDATE SCHEDULE
The demand database is updated by one year around April each year

	Value (Euros or USD millions)			% Share	Expenditure per Capita in	Average Annual % Growth ††
	2002	2006	2007	2007	2007 (Euros)	2002 - 2007
Retail Market:	-	-	171.8	53.2%	22.92	-
Foodservice Market:	-	-	151.4	46.8%	20.19	-
Total Market:	**332.5**	**319.1**	**323.2**	100.0%	**43.12**	**0.5%**
Other Countries:	36,617.0	29,704.5	30,408.5		32.54	-2.5%
World *:	36,949.6	30,023.6	30,731.7		32.63	-2.5%
% Country Market:						

Value data is provided in either US Dollars or Euros, plus local currencies..

	Value (Swiss Franc millions)			% Share	Expenditure per Capita in	Average Annual % Growth ††
	2002	2006	2007	2007	2007 (CHF)	2002 - 2007
1.00 USD in CHF's =	*1.472*	*1.641*	*1.650*			
Retail Market:	-	-	283.5	53.2%	37.82	-
Foodservice Market:	-	-	249.8	46.8%	33.32	-
Total Market:	**489.5**	**523.5**	**533.3**	**100.0%**	**71.14**	**0.5%**
Other Countries:	53,898.2	48,734.6	50,174.0		53.70	-2.5%
World_:	60,966.8	49,258.0	50,707.3		53.84	-2.5%
% Country Market:	*0.9%*	*1.1%*	*1.1%*			

Notes: Retail/Foodservice data based on estimated percent split of total market.

* "World" refers to all the countries covered by the full database (see www.fft.com); currently 25 countries.

† The table presents single product volume data in actual weights. The "Dry Weight Conversion Factor" multiplier enables you to derive RTE/RTD (ready--to-eat/ready-to-drink) weights.

†† Real % growth calculations apply full 6-year logarithmic data regression analysis to constant local currencies.

Note: Illustrative Data Only Presented

ICE CREAM IN SWITZERLAND

THE TOP-10 COMPANIES FROM FFT'S VAST DATABASE
(and much more in the alphabetic company profiles listing)

Country: Switzerland
Main Process Family: Dessert
Product: Ice Cream
Definition: Dairy/non-dairy ice cream and sorbets, industrial and artisanal (including estimates of underrecorded artisanal), soft ice.

The full 25-country database contains over 10,000 companies

UP-TO-DATE
Company mergers & acquisitions incorporated on an on-going basis

THE TOP-10 HOLDING COMPANIES
2008 COMPANY TOTAL MARKET SHARES BY VALUE

Key Local Subsidiary Given

Top-10 Companies listed in declining order of importance of their market shares.

	Ultimate Holding Company	Key Subsidiary	% Share	Cumulative % Share
1.	**Unilever**	Pierrot Lusso	30.0%	30.0%
2.	**Nestlé**	Frisco-Findus	20.4%	50.4%
3.	**Migros**	Midor	16.3%	66.7%
4.	**Zentralschweizerischer Milchverband**	Emmi Gerber	13.0%	79.7%
5.	**Coop Schweiz**	Coop Schweiz	8.0%	87.7%
6.	**Artisanal_**	Artisanal_	4.0%	91.7%
7.	**Mars**	Mars	2.0%	93.7%
8.	**General Mills**	Sygama	1.5%	95.2%
9.	**Bischofsberger**	Bischofsberger	1.0%	96.2%
10.	**Luganella**	Luganella	1.0%	97.2%
	Other Companies:		2.8%	100.0%

BRANDED Vs OWN LABEL

The inroads of distributors' **own label** products into traditional **branded** product markets highlighted.

	% Share	
Manufacturers' branded products:	69.8%	
Unbranded goods:	0.0%	
Distributors' own label products:	26.2%	(and 49.4% of retail)
Artisanal production_:	4.0%	
	100.0%	

– Artisanal: craft sales (e.g. independent craft bakers, or family ice cream parlours in Italy, considered here to be a single competitive entity/company).

– Edition: media-sourced info, company reports and major mergers & acquisitions are incorporated on an on-going basis.

Note: Illustrative Data Only Presented

Note: Illustrative Data Only Presented

ICE CREAM IN SWITZERLAND

Country: Switzerland
Product: Ice Cream
Definition: Dairy/non-dairy ice cream and sorbets, industrial and artisanal (including estimates of underrecorded artisanal), soft ice.

MAJOR BRANDS

(Top-10 Suppliers)

Holding Co.	Key Subsidiary	Major Brands
Unilever	Pierrot Lusso	*Cornettini, Cornetto, Eldorado, Goldstar, La Glace, Lusso-Eldorado, Pierrot Friola, Roulades, Solero, Sorbetteria di Rainieri, Toni, Viennetta*
Nestlé	Frisco-Findus	*Extrême Mini Mini, Frisco, Mövenpick, Schöller, Swiss Premium Ice Cream*
Migros	Midor	*Caruso, Chupa Chups, Crème d'Or, Explosion, Mega Star, Midor*
Zentralschweizerische	Emmi Gerber	*Emmi*
Coop Schweiz	Coop Schweiz	*Coop*
Mars	Mars	*Bounty, Mars, Milky Way*
General Mills	Sygama	*Häagen Dazs*
Bischofsberger	Bischofsberger	*Bischofsberger*
Luganella	Luganella	*Luganella*
Bofrost	Bofrost	*Bofrost*

MAJOR BRANDS IN THE FFT DATABASE

This list is drawn from the over 30,000 brands cited in FFT's main database across 25 countries.

"WHO OWNS WHOM"

All FFT reports match up Key Local Subsidiaries with their Holding Company

MAJOR BRANDS

The major brands for the Top-10 companies are presented here (for space reasons). An exhaustive listing by product and company of all brands identified is provided in the brands chapter.

Source: Food for Thought (FFT)

Note: Illustrative Data Only Presented

All companies for the country in alphabetic order

2008 COMPANY MARKET SHARES AND RANKINGS

(Updated continuously online)

N° of Country Markets:	1	N° of Holding Companies:	262
N° of Product Markets:	114	N° of Key Subsidiaries:	145
N° of Market Shares:	**1473**	N° of All Companies cited:	**407**

Name of subsidiary different to that of holding company

Company and Product Market: No.	Name	Country Operating Companies and Market Shares (Country Product Market Rankings in brackets): Switzer-land	*Additional countries will be entered here*					Country Market Shares: Product Market	All Food & Drink	Share of Co. Food & Drink Sales *
11er Nahrungsm.		11er Nahrungsm.						**2.0%**	**0.011%**	**100.0%**
7.3	**Frozen Potato**	2.0% (7)								
ABF		ABF						**35.0%**	**0.073%**	**92.5%**
16.6	**Powd. Choc. & Malted Drinks**	35.0% (1)								
ABF		Twinings						**5.0%**	**0.006%**	**7.5%**
16.4	**Black Tea**	5.0% (6)								
ABN Amro		Dietisa						**40.0%**	**0.476%**	**95.3%**
17.5	**Health & Sports Drinks**	40.0% (1)								
ABN Amro		Dietisa						**20.0%**	**0.013%**	**2.6%**
9.3	**Powdered Desserts**	20.0% (3)								
ABN Amro		Dietisa						**1.5%**	**0.011%**	**2.1%**
5.12	**Other Sugar Confectionery**	1.5% (10)								
Agri-france		Agri-france						**2.5%**	**0.038%**	**100.0%**
13.14	**Poultry**	2.5% (9)								
Agrolimen		Affinity Petcare						**8.0%**	**0.019%**	**100.0%**
20.4	**Dry/Semi-Moist Dog food**	8.0% (4)								
Alfesca		Labeyrie						**3.0%**	**0.026%**	**100.0%**
14.4	**Other Processed Fish**	3.0% (5)								
Follows the remaining 262 Holding Companies and 145 Key Subsidiaries (with different name), or a total 407 companies.										
Ültje		Ültje								
5.33	**Extruded Snacks**	15% (2)						**15.0%**	**0.027%**	**100.0%**

FULL ALPHABETIC LIST OF COMPANIES

ALL SUPPLIERS IDENTIFIED FOR THIS COUNTRY IN THE FFT DATABASE COVERING OVER 10,000 COMPANIES ARE PROVIDED, TOGETHER WITH THEIR KEY SUBSIDIARIES AND PRODUCT MARKET SHARES

COMPANY PRESENCE AND DOMINANCE

- The regional company market share (if more then one country presented, else repeats the country share).
- The share of the entire food & drink market for the country (countries) selected. This column adds up to 100% at the end of the full company alphabetic listing.
- The contribution to company sales turnover at retail and foodservice buy-in prices, adding up to 100%.

WHAT YOU GET

- Key Country Subsidiaries
- Product Market Share
- Product and Country Ranking
- Company Presence & Dominance

INDIVIDUAL STRATEGIC COMPANY PROFILES

You can select and download individual company profiles online for any company. If a major M&A event occurs, within 10 days or so the new profile will be available online.

* Definition: Market share data refers to total FINAL human consumption, including retail, catering/foodservice and artisanal (home-produced for direct sale), excluding auto- and industrial consumption, and calculated in value terms at retail and catering buy-in prices including direct taxes, e.g. VAT and Excise Taxes. West European and country total market shares are indicative weighted averages, based on latest Food & Drink Market data available. Country market rankings are cited in brackets. Country market shares under 3% are indicative.

Edition: Market shares updated continuously, with mergers & acquisitions incorporated regularly; latest market values used for weighted averages (see online)

Source: Food for Thought

Note: Illustrative Data Only Presented

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114 Single Product Markets Listed

All major brands in a country, drawn from the FFT database of over 30,000 brands, are listed by product and by company.

BRANDS BY PRODUCT AND COUNTRY MARK

No.	Product Name	C'try	Ultimate Holding Co.	Key Subsidiaries	
9.1	Ice Cream	C H	Laiteries Réunies	Nutrilait	Gold Star, Pierrot
9.1	Ice Cream	C H	Luganella	Luganella	Luganella
9.1	Ice Cream	C H	Mars	Mars	Bounty, Mars, Milky Way
9.1	Ice Cream	C H	Migros	Midor	Caruso, Chupa Chups, Crème d'Or, Explosion, Mega Star, Midor
9.1	Ice Cream	C H	Nestlé		Extrême Mini Mini, Frisco, Mövenpick, Schöller, Swiss Premium Ice Cream

Major Brands are listed by product, country, holding company and key local subsidiary.

All holding companies identified in a country, usually several hundred, are listed alphabetically.

BRANDS BY ULTIMATE HOLDING COMPANY

Ultimate Holding Co.	Key Subsidiaries	No.	Product Name	C'try	Major Brands
Mars	Effem	20.4	Dry/Semi-Moist Dog food	C H	Frolic, Loyal, Pedigree Pal, Punch, Royal Canin, Thomas
Mateschitz & Vogel	Mateschitz & Vogel	17.5	Health & Sports Drinks	C H	Red Bull
Mauler	Mauler	18.22	Sparkling Wine	C H	Mauler
Max Havelaar	Max Havelaar	16.1	Bean and Ground Coffee	C H	Max Havelaar
McCormick	McCormick	11.7	Herbs & Spices	C H	Ducros, McCormick
Mederer	Mederer	5.12	Other Sugar Confectionery	C H	Gummi Bear, Mederer, Topino
Migros	Jowa	1.2	Bread Products	C H	Bio & Sano, Chocs Pingu, Crusca, Flute Rustique, Trentino
Migros	Jowa	1.3	Crispbread	C H	Jowa
Migros	Midor	1.4	Industrial Pastry	C H	Midor
Migros	Midor	1.5	Biscuits	C H	Blévita, Break, Chocmidor, Cremisso, Dino, Farmer, Fleur, M-Bio, Midor, Prestige

The pdf report and all pdf downloads come with extensive bookmarks enabling fast access to relevant product and company pages

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FREE TRIAL

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