

**Food For Thought (FFT)
Strategic Information Services**

Food & Drink Markets

2008 Edition

Prepared for:

Food For Thought

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FOREWORD

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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.

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. Foodservice Markets: The total (retail + foodservice) human consumption market is established first. An estimate of the food-service market share, derived from multiple sources and industry interviews, is then applied to this total. Owing to the extremely fragmented nature of the foodservice market, specific foodservice surveys are not considered feasible or reliable.

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

- 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:** Strategic View: Presentation techniques favoring a global vision of food & drink markets are systematically applied.

TABLE OF CONTENTS

Summary Market Tables	83
2002 Total Expenditure	83
All Flour & Bakery to Cream	83
Germany and 1-Country Total	83
Yoghurt to Beef	84
Germany and 1-Country Total	84
Pork to Still Wine	85
Germany and 1-Country Total	85
Sparkling Wine to Dry/Semi-Moist Dog food and 114-Product Total	86
Germany and 1-Country Total	86
2007 Total Expenditure	87
All Flour & Bakery to Cream	87
Germany and 1-Country Total	87
Yoghurt to Beef	88
Germany and 1-Country Total	88
Pork to Still Wine	89
Germany and 1-Country Total	89
Sparkling Wine to Dry/Semi-Moist Dog food and 114-Product Total	90
Germany and 1-Country Total	90
2007 Retail Expenditure	91
All Flour & Bakery to Cream	91
Germany and 1-Country Total	91
Yoghurt to Beef	92
Germany and 1-Country Total	92
Pork to Still Wine	93
Germany and 1-Country Total	93
Sparkling Wine to Dry/Semi-Moist Dog food and 114-Product Total	94
Germany and 1-Country Total	94
2007 Foodservice Expenditure	95
All Flour & Bakery to Cream	95
Germany and 1-Country Total	95
Yoghurt to Beef	96
Germany and 1-Country Total	96
Pork to Still Wine	97
Germany and 1-Country Total	97
Sparkling Wine to Dry/Semi-Moist Dog food and 114-Product Total	98
Germany and 1-Country Total	98
2002-2007 Value Growth Rates	99
All Flour & Bakery to Cream	99
Germany and 1-Country Total	99
Yoghurt to Beef	100
Germany and 1-Country Total	100
Pork to Still Wine	101
Germany and 1-Country Total	101
Sparkling Wine to Dry/Semi-Moist Dog food and 114-Product Total	102

Germany and 1-Country Total	102
2002-2007 Per Capita Growth Rates	103
All Flour & Bakery to Cream	103
Germany and 1-Country Total	103
Yoghurt to Beef	104
Germany and 1-Country Total	104
Pork to Still Wine	105
Germany and 1-Country Total	105
Sparkling Wine to Dry/Semi-Moist Dog food and 114-Product Total	106
Germany and 1-Country Total	106
2007 Retail Market Share	107
All Flour & Bakery to Cream	107
Germany and 1-Country Total	107
Yoghurt to Beef	108
Germany and 1-Country Total	108
Pork to Still Wine	109
Germany and 1-Country Total	109
Sparkling Wine to Dry/Semi-Moist Dog food and 114-Product Total	110
Germany and 1-Country Total	110
2007 Foodservice Market Share	111
All Flour & Bakery to Cream	111
Germany and 1-Country Total	111
Yoghurt to Beef	112
Germany and 1-Country Total	112
Pork to Still Wine	113
Germany and 1-Country Total	113
Sparkling Wine to Dry/Semi-Moist Dog food and 114-Product Total	114
Germany and 1-Country Total	114
2007 Total Retail Market Share	115
All Flour & Bakery to Cream	115
Germany and 1-Country Total	115
Yoghurt to Beef	116
Germany and 1-Country Total	116
Pork to Still Wine	117
Germany and 1-Country Total	117
Sparkling Wine to Dry/Semi-Moist Dog food and 114-Product Total	118
Germany and 1-Country Total	118
2007 Total Foodservice Market Share	119
All Flour & Bakery to Cream	119
Germany and 1-Country Total	119
Yoghurt to Beef	120
Germany and 1-Country Total	120
Pork to Still Wine	121
Germany and 1-Country Total	121
Sparkling Wine to Dry/Semi-Moist Dog food and 114-Product Total	122
Germany and 1-Country Total	122

Demand and Supply by Product	123
1. All Flour & Bakery Market Profile	125
Periscope for All Flour & Bakery in Germany	125
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, All Flour & Bakery, Germany	126
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2007-2012	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, All Flour & Bakery, Germany	126
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	
Total demand 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market consumption, 2007	
Total Market Value, All Flour & Bakery, Germany	126
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market expenditure, 2007	
Company Market Shares, All Flour & Bakery, Germany	127
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, All Flour & Bakery, Germany	127
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	
1.1 Flour (retail only) Market Profile	129
Periscope for Flour (retail only) in Germany	129
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, Flour (retail only), Germany	130
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2007-2012	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, Flour (retail only), Germany	130
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	
Total demand 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market consumption, 2007	
Total Market Value, Flour (retail only), Germany	130
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market expenditure, 2007	
Company Market Shares, Flour (retail only), Germany	131
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, Flour (retail only), Germany	131
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	
Major Brands, Flour (retail only), Germany	132
Major Brands Listing by Company and Subsidiary, 2008	

1.2 Bread Products Market Profile	133
Periscope for Bread Products in Germany	133
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, Bread Products, Germany	134
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2007-2012	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, Bread Products, Germany	134
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	
Total demand 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market consumption, 2007	
Total Market Value, Bread Products, Germany	134
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market expenditure, 2007	
Company Market Shares, Bread Products, Germany	135
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, Bread Products, Germany	135
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	
Major Brands, Bread Products, Germany	136
Major Brands Listing by Company and Subsidiary, 2008	
1.3 Crispbread Market Profile	137
Periscope for Crispbread in Germany	137
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, Crispbread, Germany	138
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2007-2012	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, Crispbread, Germany	138
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	
Total demand 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market consumption, 2007	
Total Market Value, Crispbread, Germany	138
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market expenditure, 2007	
Company Market Shares, Crispbread, Germany	139
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, Crispbread, Germany	139
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	
Major Brands, Crispbread, Germany	140
Major Brands Listing by Company and Subsidiary, 2008	

1.4 Industrial Pastry Market Profile	141
Periscope for Industrial Pastry in Germany	141
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, Industrial Pastry, Germany	142
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2007-2012	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, Industrial Pastry, Germany	142
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	
Total demand 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market consumption, 2007	
Total Market Value, Industrial Pastry, Germany	142
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market expenditure, 2007	
Company Market Shares, Industrial Pastry, Germany	143
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, Industrial Pastry, Germany	143
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	
Major Brands, Industrial Pastry, Germany	144
Major Brands Listing by Company and Subsidiary, 2008	
1.5 Biscuits Market Profile	145
Periscope for Biscuits in Germany	145
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, Biscuits, Germany	146
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2007-2012	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, Biscuits, Germany	146
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	
Total demand 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market consumption, 2007	
Total Market Value, Biscuits, Germany	146
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market expenditure, 2007	
Company Market Shares, Biscuits, Germany	147
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, Biscuits, Germany	147
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	
Major Brands, Biscuits, Germany	148
Major Brands Listing by Company and Subsidiary, 2008	

1.6 Frozen Pastry Products Market Profile	149
Periscope for Frozen Pastry Products in Germany	149
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, Frozen Pastry Products, Germany	150
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2007-2012	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, Frozen Pastry Products, Germany	150
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	
Total demand 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market consumption, 2007	
Total Market Value, Frozen Pastry Products, Germany	150
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market expenditure, 2007	
Company Market Shares, Frozen Pastry Products, Germany	151
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, Frozen Pastry Products, Germany	151
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	
Major Brands, Frozen Pastry Products, Germany	152
Major Brands Listing by Company and Subsidiary, 2008	
1.7 All Pasta Market Profile	153
Periscope for All Pasta in Germany	153
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, All Pasta, Germany	154
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2007-2012	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, All Pasta, Germany	154
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	
Total demand 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market consumption, 2007	
Total Market Value, All Pasta, Germany	154
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market expenditure, 2007	
Company Market Shares, All Pasta, Germany	155
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, All Pasta, Germany	155
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	
1.71 Fresh Pasta Market Profile	157
Periscope for Fresh Pasta in Germany	157

Summary Flowchart of Major Suppliers, Demand and Distribution Channels	157
Introduction, Fresh Pasta, Germany	158
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2007-2012	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, Fresh Pasta, Germany	158
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	
Total demand 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market consumption, 2007	
Total Market Value, Fresh Pasta, Germany	158
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market expenditure, 2007	
Company Market Shares, Fresh Pasta, Germany	159
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, Fresh Pasta, Germany	159
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	
Major Brands, Fresh Pasta, Germany	160
Major Brands Listing by Company and Subsidiary, 2008	
1.72 Dry Pasta Market Profile	161
Periscope for Dry Pasta in Germany	161
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, Dry Pasta, Germany	162
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2007-2012	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, Dry Pasta, Germany	162
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	
Total demand 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market consumption, 2007	
Total Market Value, Dry Pasta, Germany	162
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market expenditure, 2007	
Company Market Shares, Dry Pasta, Germany	163
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, Dry Pasta, Germany	163
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	
Major Brands, Dry Pasta, Germany	164
Major Brands Listing by Company and Subsidiary, 2008	
2. All Other Cereals Market Profile	165
Periscope for All Other Cereals in Germany	165

Summary Flowchart of Major Suppliers, Demand and Distribution Channels	165
Introduction, All Other Cereals, Germany	166
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2007-2012	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, All Other Cereals, Germany	166
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	
Total demand 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market consumption, 2007	
Total Market Value, All Other Cereals, Germany	166
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market expenditure, 2007	
Company Market Shares, All Other Cereals, Germany	167
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, All Other Cereals, Germany	167
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	
2.1 Rice Market Profile	169
Periscope for Rice in Germany	169
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, Rice, Germany	170
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2007-2012	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, Rice, Germany	170
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	
Total demand 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market consumption, 2007	
Total Market Value, Rice, Germany	170
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market expenditure, 2007	
Company Market Shares, Rice, Germany	171
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, Rice, Germany	171
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	
Major Brands, Rice, Germany	172
Major Brands Listing by Company and Subsidiary, 2008	
2.2 Breakfast Cereals Market Profile	173
Periscope for Breakfast Cereals in Germany	173
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, Breakfast Cereals, Germany	174

Detailed product definition, including local market particularities	174
5-year regional and 25-country real annual % value total forecasts, 2007-2012	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, Breakfast Cereals, Germany	174
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	
Total demand 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market consumption, 2007	
Total Market Value, Breakfast Cereals, Germany	174
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market expenditure, 2007	
Company Market Shares, Breakfast Cereals, Germany	175
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, Breakfast Cereals, Germany	175
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	
Major Brands, Breakfast Cereals, Germany	176
Major Brands Listing by Company and Subsidiary, 2008	
3. All Sugar & Sweeteners Market Profile	177
Periscope for All Sugar & Sweeteners in Germany	177
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, All Sugar & Sweeteners, Germany	178
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2007-2012	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, All Sugar & Sweeteners, Germany	178
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	
Total demand 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market consumption, 2007	
Total Market Value, All Sugar & Sweeteners, Germany	178
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market expenditure, 2007	
Company Market Shares, All Sugar & Sweeteners, Germany	179
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, All Sugar & Sweeteners, Germany	179
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	
3.1 Sugar Market Profile	181
Periscope for Sugar in Germany	181
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, Sugar, Germany	182
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2007-2012	

Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	182
Total Market Volume, Sugar, Germany	182
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	
Total demand 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market consumption, 2007	
Total Market Value, Sugar, Germany	182
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market expenditure, 2007	
Company Market Shares, Sugar, Germany	183
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, Sugar, Germany	183
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	
Major Brands, Sugar, Germany	184
Major Brands Listing by Company and Subsidiary, 2008	
3.2 Artificial Sweeteners Market Profile	185
Periscope for Artificial Sweeteners in Germany	185
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, Artificial Sweeteners, Germany	186
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2007-2012	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, Artificial Sweeteners, Germany	186
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	
Total demand 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market consumption, 2007	
Total Market Value, Artificial Sweeteners, Germany	186
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market expenditure, 2007	
Company Market Shares, Artificial Sweeteners, Germany	187
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, Artificial Sweeteners, Germany	187
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	
Major Brands, Artificial Sweeteners, Germany	188
Major Brands Listing by Company and Subsidiary, 2008	
4. All Preserves Market Profile	189
Periscope for All Preserves in Germany	189
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, All Preserves, Germany	190
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2007-2012	

Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	190
Total Market Volume, All Preserves, Germany	190
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	
Total demand 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market consumption, 2007	
Total Market Value, All Preserves, Germany	190
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market expenditure, 2007	
Company Market Shares, All Preserves, Germany	191
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, All Preserves, Germany	191
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	
4.1 Jams & Marmalade Market Profile	193
Periscope for Jams & Marmalade in Germany	193
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, Jams & Marmalade, Germany	194
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2007-2012	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, Jams & Marmalade, Germany	194
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	
Total demand 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market consumption, 2007	
Total Market Value, Jams & Marmalade, Germany	194
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market expenditure, 2007	
Company Market Shares, Jams & Marmalade, Germany	195
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, Jams & Marmalade, Germany	195
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	
Major Brands, Jams & Marmalade, Germany	196
Major Brands Listing by Company and Subsidiary, 2008	
4.2 Honey Market Profile	197
Periscope for Honey in Germany	197
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, Honey, Germany	198
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2007-2012	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	

Total Market Volume, Honey, Germany	198
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	
Total demand 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market consumption, 2007	
Total Market Value, Honey, Germany	198
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market expenditure, 2007	
Company Market Shares, Honey, Germany	199
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, Honey, Germany	199
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	
Major Brands, Honey, Germany	200
Major Brands Listing by Company and Subsidiary, 2008	
4.3 Other Sweet Spreads Market Profile	201
Periscope for Other Sweet Spreads in Germany	201
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, Other Sweet Spreads, Germany	202
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2007-2012	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, Other Sweet Spreads, Germany	202
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	
Total demand 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market consumption, 2007	
Total Market Value, Other Sweet Spreads, Germany	202
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market expenditure, 2007	
Company Market Shares, Other Sweet Spreads, Germany	203
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, Other Sweet Spreads, Germany	203
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	
Major Brands, Other Sweet Spreads, Germany	204
Major Brands Listing by Company and Subsidiary, 2008	
5. All Confectionery & Snacks Market Profile	205
Periscope for All Confectionery & Snacks in Germany	205
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, All Confectionery & Snacks, Germany	206
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2007-2012	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	

Total Market Volume, All Confectionery & Snacks, Germany	206
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	
Total demand 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market consumption, 2007	
Total Market Value, All Confectionery & Snacks, Germany	206
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market expenditure, 2007	
Company Market Shares, All Confectionery & Snacks, Germany	207
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, All Confectionery & Snacks, Germany	207
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	
5.1 All Sugar Confectionery Market Profile	209
Periscope for All Sugar Confectionery in Germany	209
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, All Sugar Confectionery, Germany	210
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2007-2012	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, All Sugar Confectionery, Germany	210
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	
Total demand 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market consumption, 2007	
Total Market Value, All Sugar Confectionery, Germany	210
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market expenditure, 2007	
Company Market Shares, All Sugar Confectionery, Germany	211
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, All Sugar Confectionery, Germany	211
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	
5.11 Chewing Gum Market Profile	213
Periscope for Chewing Gum in Germany	213
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, Chewing Gum, Germany	214
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2007-2012	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, Chewing Gum, Germany	214
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	
Total demand 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market consumption, 2007	

Total Market Value, Chewing Gum, Germany	214
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market expenditure, 2007	
Company Market Shares, Chewing Gum, Germany	215
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, Chewing Gum, Germany	215
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	
Major Brands, Chewing Gum, Germany	216
Major Brands Listing by Company and Subsidiary, 2008	
5.12 Other Sugar Confectionery Market Profile	217
Periscope for Other Sugar Confectionery in Germany	217
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, Other Sugar Confectionery, Germany	218
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2007-2012	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, Other Sugar Confectionery, Germany	218
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	
Total demand 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market consumption, 2007	
Total Market Value, Other Sugar Confectionery, Germany	218
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market expenditure, 2007	
Company Market Shares, Other Sugar Confectionery, Germany	219
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, Other Sugar Confectionery, Germany	219
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	
Major Brands, Other Sugar Confectionery, Germany	220
Major Brands Listing by Company and Subsidiary, 2008	
5.2 All Chocolate Confectionery Market Profile	221
Periscope for All Chocolate Confectionery in Germany	221
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, All Chocolate Confectionery, Germany	222
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2007-2012	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, All Chocolate Confectionery, Germany	222
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	
Total demand 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market consumption, 2007	

Total Market Value, All Chocolate Confectionery, Germany	222
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market expenditure, 2007	
Company Market Shares, All Chocolate Confectionery, Germany	223
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, All Chocolate Confectionery, Germany	223
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	
5.21 Chocolate Countlines Market Profile	225
Periscope for Chocolate Countlines in Germany	225
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, Chocolate Countlines, Germany	226
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2007-2012	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, Chocolate Countlines, Germany	226
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	
Total demand 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market consumption, 2007	
Total Market Value, Chocolate Countlines, Germany	226
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market expenditure, 2007	
Company Market Shares, Chocolate Countlines, Germany	227
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, Chocolate Countlines, Germany	227
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	
Major Brands, Chocolate Countlines, Germany	228
Major Brands Listing by Company and Subsidiary, 2008	
5.22 Other Chocolate Confectionery Market Profile	229
Periscope for Other Chocolate Confectionery in Germany	229
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, Other Chocolate Confectionery, Germany	230
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2007-2012	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, Other Chocolate Confectionery, Germany	230
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	
Total demand 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market consumption, 2007	
Total Market Value, Other Chocolate Confectionery, Germany	230
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	

Total demand real 5-year growth rates, 2002-2007	230
Per capita retail, foodservice and total market expenditure, 2007	
Company Market Shares, Other Chocolate Confectionery, Germany	231
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, Other Chocolate Confectionery, Germany	231
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	
Major Brands, Other Chocolate Confectionery, Germany	232
Major Brands Listing by Company and Subsidiary, 2008	
5.3 All Savoury Snacks Market Profile	233
Periscope for All Savoury Snacks in Germany	233
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, All Savoury Snacks, Germany	234
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2007-2012	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, All Savoury Snacks, Germany	234
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	
Total demand 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market consumption, 2007	
Total Market Value, All Savoury Snacks, Germany	234
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market expenditure, 2007	
Company Market Shares, All Savoury Snacks, Germany	235
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, All Savoury Snacks, Germany	235
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	
5.31 Nuts Market Profile	237
Periscope for Nuts in Germany	237
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, Nuts, Germany	238
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2007-2012	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, Nuts, Germany	238
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	
Total demand 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market consumption, 2007	
Total Market Value, Nuts, Germany	238
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market expenditure, 2007	

Company Market Shares, Nuts, Germany	239
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, Nuts, Germany	239
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	
Major Brands, Nuts, Germany	240
Major Brands Listing by Company and Subsidiary, 2008	
5.32 Savoury Biscuits Market Profile	241
Periscope for Savoury Biscuits in Germany	241
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, Savoury Biscuits, Germany	242
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2007-2012	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, Savoury Biscuits, Germany	242
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	
Total demand 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market consumption, 2007	
Total Market Value, Savoury Biscuits, Germany	242
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market expenditure, 2007	
Company Market Shares, Savoury Biscuits, Germany	243
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, Savoury Biscuits, Germany	243
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	
Major Brands, Savoury Biscuits, Germany	244
Major Brands Listing by Company and Subsidiary, 2008	
5.33 Extruded Snacks Market Profile	245
Periscope for Extruded Snacks in Germany	245
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, Extruded Snacks, Germany	246
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2007-2012	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, Extruded Snacks, Germany	246
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	
Total demand 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market consumption, 2007	
Total Market Value, Extruded Snacks, Germany	246
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market expenditure, 2007	

Company Market Shares, Extruded Snacks, Germany	247
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, Extruded Snacks, Germany	247
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	
Major Brands, Extruded Snacks, Germany	248
Major Brands Listing by Company and Subsidiary, 2008	
6. All Fruits & Vegetables Market Profile	249
Periscope for All Fruits & Vegetables in Germany	249
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, All Fruits & Vegetables, Germany	250
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2007-2012	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, All Fruits & Vegetables, Germany	250
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	
Total demand 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market consumption, 2007	
Total Market Value, All Fruits & Vegetables, Germany	250
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market expenditure, 2007	
Company Market Shares, All Fruits & Vegetables, Germany	251
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, All Fruits & Vegetables, Germany	251
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	
6.1 Fresh Fruit Market Profile	253
Periscope for Fresh Fruit in Germany	253
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, Fresh Fruit, Germany	254
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2007-2012	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, Fresh Fruit, Germany	254
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	
Total demand 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market consumption, 2007	
Total Market Value, Fresh Fruit, Germany	254
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market expenditure, 2007	
Company Market Shares, Fresh Fruit, Germany	255
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	

Who owns Whom: Key Local Subsidiary given for each Holding Company	255
Distribution Channels, Fresh Fruit, Germany	255
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	
Major Brands, Fresh Fruit, Germany	256
Major Brands Listing by Company and Subsidiary, 2008	
6.2 Canned Fruit Market Profile	257
Periscope for Canned Fruit in Germany	257
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, Canned Fruit, Germany	258
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2007-2012	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, Canned Fruit, Germany	258
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	
Total demand 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market consumption, 2007	
Total Market Value, Canned Fruit, Germany	258
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market expenditure, 2007	
Company Market Shares, Canned Fruit, Germany	259
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, Canned Fruit, Germany	259
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	
Major Brands, Canned Fruit, Germany	260
Major Brands Listing by Company and Subsidiary, 2008	
6.3 Frozen Fruit Market Profile	261
Periscope for Frozen Fruit in Germany	261
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, Frozen Fruit, Germany	262
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2007-2012	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, Frozen Fruit, Germany	262
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	
Total demand 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market consumption, 2007	
Total Market Value, Frozen Fruit, Germany	262
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market expenditure, 2007	
Company Market Shares, Frozen Fruit, Germany	263
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	

Who owns Whom: Key Local Subsidiary given for each Holding Company	263
Distribution Channels, Frozen Fruit, Germany	263
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	
Major Brands, Frozen Fruit, Germany	264
Major Brands Listing by Company and Subsidiary, 2008	
6.4 Fresh Vegetables Market Profile	265
Periscope for Fresh Vegetables in Germany	265
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, Fresh Vegetables, Germany	266
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2007-2012	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, Fresh Vegetables, Germany	266
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	
Total demand 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market consumption, 2007	
Total Market Value, Fresh Vegetables, Germany	266
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market expenditure, 2007	
Company Market Shares, Fresh Vegetables, Germany	267
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, Fresh Vegetables, Germany	267
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	
Major Brands, Fresh Vegetables, Germany	268
Major Brands Listing by Company and Subsidiary, 2008	
6.5 Canned Vegetables Market Profile	269
Periscope for Canned Vegetables in Germany	269
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, Canned Vegetables, Germany	270
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2007-2012	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, Canned Vegetables, Germany	270
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	
Total demand 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market consumption, 2007	
Total Market Value, Canned Vegetables, Germany	270
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market expenditure, 2007	
Company Market Shares, Canned Vegetables, Germany	271
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	

Who owns Whom: Key Local Subsidiary given for each Holding Company	271
Distribution Channels, Canned Vegetables, Germany	271
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	
Major Brands, Canned Vegetables, Germany	272
Major Brands Listing by Company and Subsidiary, 2008	
6.6 Frozen Vegetables Market Profile	273
Periscope for Frozen Vegetables in Germany	273
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, Frozen Vegetables, Germany	274
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2007-2012	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, Frozen Vegetables, Germany	274
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	
Total demand 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market consumption, 2007	
Total Market Value, Frozen Vegetables, Germany	274
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market expenditure, 2007	
Company Market Shares, Frozen Vegetables, Germany	275
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, Frozen Vegetables, Germany	275
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	
Major Brands, Frozen Vegetables, Germany	276
Major Brands Listing by Company and Subsidiary, 2008	
6.7 Chilled Vegetables Market Profile	277
Periscope for Chilled Vegetables in Germany	277
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, Chilled Vegetables, Germany	278
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2007-2012	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, Chilled Vegetables, Germany	278
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	
Total demand 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market consumption, 2007	
Total Market Value, Chilled Vegetables, Germany	278
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market expenditure, 2007	
Company Market Shares, Chilled Vegetables, Germany	279
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	

Who owns Whom: Key Local Subsidiary given for each Holding Company	279
Distribution Channels, Chilled Vegetables, Germany	279
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	
Major Brands, Chilled Vegetables, Germany	280
Major Brands Listing by Company and Subsidiary, 2008	
7. All Potato & Potato Products Market Profile	281
Periscope for All Potato & Potato Products in Germany	281
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, All Potato & Potato Products, Germany	282
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2007-2012	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, All Potato & Potato Products, Germany	282
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	
Total demand 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market consumption, 2007	
Total Market Value, All Potato & Potato Products, Germany	282
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market expenditure, 2007	
Company Market Shares, All Potato & Potato Products, Germany	283
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, All Potato & Potato Products, Germany	283
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	
7.1 Fresh Potatoes Market Profile	285
Periscope for Fresh Potatoes in Germany	285
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, Fresh Potatoes, Germany	286
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2007-2012	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, Fresh Potatoes, Germany	286
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	
Total demand 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market consumption, 2007	
Total Market Value, Fresh Potatoes, Germany	286
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market expenditure, 2007	
Company Market Shares, Fresh Potatoes, Germany	287
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, Fresh Potatoes, Germany	287

Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	287
Major Brands, Fresh Potatoes, Germany	288
Major Brands Listing by Company and Subsidiary, 2008	
7.2 Potato Crisps Market Profile	289
Periscope for Potato Crisps in Germany	289
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, Potato Crisps, Germany	290
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2007-2012	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, Potato Crisps, Germany	290
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	
Total demand 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market consumption, 2007	
Total Market Value, Potato Crisps, Germany	290
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market expenditure, 2007	
Company Market Shares, Potato Crisps, Germany	291
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, Potato Crisps, Germany	291
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	
Major Brands, Potato Crisps, Germany	292
Major Brands Listing by Company and Subsidiary, 2008	
7.3 Frozen Potato Market Profile	293
Periscope for Frozen Potato in Germany	293
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, Frozen Potato, Germany	294
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2007-2012	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, Frozen Potato, Germany	294
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	
Total demand 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market consumption, 2007	
Total Market Value, Frozen Potato, Germany	294
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market expenditure, 2007	
Company Market Shares, Frozen Potato, Germany	295
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, Frozen Potato, Germany	295

Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	295
Major Brands, Frozen Potato, Germany	296
Major Brands Listing by Company and Subsidiary, 2008	
7.4 Dehydrated Potato Market Profile	297
Periscope for Dehydrated Potato in Germany	297
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, Dehydrated Potato, Germany	298
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2007-2012	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, Dehydrated Potato, Germany	298
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	
Total demand 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market consumption, 2007	
Total Market Value, Dehydrated Potato, Germany	298
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market expenditure, 2007	
Company Market Shares, Dehydrated Potato, Germany	299
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, Dehydrated Potato, Germany	299
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	
Major Brands, Dehydrated Potato, Germany	300
Major Brands Listing by Company and Subsidiary, 2008	
8. All Dairy Products Market Profile	301
Periscope for All Dairy Products in Germany	301
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, All Dairy Products, Germany	302
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2007-2012	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, All Dairy Products, Germany	302
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	
Total demand 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market consumption, 2007	
Total Market Value, All Dairy Products, Germany	302
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market expenditure, 2007	
Company Market Shares, All Dairy Products, Germany	303
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, All Dairy Products, Germany	303

Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	303
8.1 Liquid Milk Market Profile	305
Periscope for Liquid Milk in Germany	305
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, Liquid Milk, Germany	306
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2007-2012	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, Liquid Milk, Germany	306
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	
Total demand 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market consumption, 2007	
Total Market Value, Liquid Milk, Germany	306
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market expenditure, 2007	
Company Market Shares, Liquid Milk, Germany	307
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, Liquid Milk, Germany	307
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	
Major Brands, Liquid Milk, Germany	308
Major Brands Listing by Company and Subsidiary, 2008	
8.2 Cream Market Profile	309
Periscope for Cream in Germany	309
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, Cream, Germany	310
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2007-2012	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, Cream, Germany	310
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	
Total demand 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market consumption, 2007	
Total Market Value, Cream, Germany	310
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market expenditure, 2007	
Company Market Shares, Cream, Germany	311
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, Cream, Germany	311
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	
Major Brands, Cream, Germany	312

Major Brands Listing by Company and Subsidiary, 2008	312
8.3 Yoghurt Market Profile	313
Periscope for Yoghurt in Germany	313
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, Yoghurt, Germany	314
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2007-2012	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, Yoghurt, Germany	314
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	
Total demand 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market consumption, 2007	
Total Market Value, Yoghurt, Germany	314
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market expenditure, 2007	
Company Market Shares, Yoghurt, Germany	315
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, Yoghurt, Germany	315
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	
Major Brands, Yoghurt, Germany	316
Major Brands Listing by Company and Subsidiary, 2008	
8.4 Condensed Milk Market Profile	317
Periscope for Condensed Milk in Germany	317
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, Condensed Milk, Germany	318
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2007-2012	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, Condensed Milk, Germany	318
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	
Total demand 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market consumption, 2007	
Total Market Value, Condensed Milk, Germany	318
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market expenditure, 2007	
Company Market Shares, Condensed Milk, Germany	319
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, Condensed Milk, Germany	319
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	
Major Brands, Condensed Milk, Germany	320

Major Brands Listing by Company and Subsidiary, 2008	320
8.5 Powdered Milk Market Profile	321
Periscope for Powdered Milk in Germany	321
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, Powdered Milk, Germany	322
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2007-2012	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, Powdered Milk, Germany	322
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	
Total demand 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market consumption, 2007	
Total Market Value, Powdered Milk, Germany	322
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market expenditure, 2007	
Company Market Shares, Powdered Milk, Germany	323
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, Powdered Milk, Germany	323
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	
Major Brands, Powdered Milk, Germany	324
Major Brands Listing by Company and Subsidiary, 2008	
8.6 Fresh Cheese Market Profile	325
Periscope for Fresh Cheese in Germany	325
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, Fresh Cheese, Germany	326
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2007-2012	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, Fresh Cheese, Germany	326
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	
Total demand 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market consumption, 2007	
Total Market Value, Fresh Cheese, Germany	326
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market expenditure, 2007	
Company Market Shares, Fresh Cheese, Germany	327
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, Fresh Cheese, Germany	327
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	
Major Brands, Fresh Cheese, Germany	328

Major Brands Listing by Company and Subsidiary, 2008	328
8.7 Natural Cheese Market Profile	329
Periscope for Natural Cheese in Germany	329
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, Natural Cheese, Germany	330
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2007-2012	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, Natural Cheese, Germany	330
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	
Total demand 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market consumption, 2007	
Total Market Value, Natural Cheese, Germany	330
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market expenditure, 2007	
Company Market Shares, Natural Cheese, Germany	331
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, Natural Cheese, Germany	331
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	
Major Brands, Natural Cheese, Germany	332
Major Brands Listing by Company and Subsidiary, 2008	
8.8 Processed Cheese Market Profile	333
Periscope for Processed Cheese in Germany	333
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, Processed Cheese, Germany	334
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2007-2012	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, Processed Cheese, Germany	334
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	
Total demand 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market consumption, 2007	
Total Market Value, Processed Cheese, Germany	334
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market expenditure, 2007	
Company Market Shares, Processed Cheese, Germany	335
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, Processed Cheese, Germany	335
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	
Major Brands, Processed Cheese, Germany	336

Major Brands Listing by Company and Subsidiary, 2008	336
8.9 Eggs Market Profile	337
Periscope for Eggs in Germany	337
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, Eggs, Germany	338
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2007-2012	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, Eggs, Germany	338
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	
Total demand 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market consumption, 2007	
Total Market Value, Eggs, Germany	338
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market expenditure, 2007	
Company Market Shares, Eggs, Germany	339
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, Eggs, Germany	339
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	
Major Brands, Eggs, Germany	340
Major Brands Listing by Company and Subsidiary, 2008	
9. All Desserts & Ice Cream Market Profile	341
Periscope for All Desserts & Ice Cream in Germany	341
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, All Desserts & Ice Cream, Germany	342
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2007-2012	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, All Desserts & Ice Cream, Germany	342
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	
Total demand 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market consumption, 2007	
Total Market Value, All Desserts & Ice Cream, Germany	342
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market expenditure, 2007	
Company Market Shares, All Desserts & Ice Cream, Germany	343
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, All Desserts & Ice Cream, Germany	343
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	
9.1 Ice Cream Market Profile	345

Periscope for Ice Cream in Germany	345
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, Ice Cream, Germany	346
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2007-2012	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, Ice Cream, Germany	346
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	
Total demand 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market consumption, 2007	
Total Market Value, Ice Cream, Germany	346
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market expenditure, 2007	
Company Market Shares, Ice Cream, Germany	347
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, Ice Cream, Germany	347
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	
Major Brands, Ice Cream, Germany	348
Major Brands Listing by Company and Subsidiary, 2008	
9.2 Chilled Dairy Desserts Market Profile	349
Periscope for Chilled Dairy Desserts in Germany	349
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, Chilled Dairy Desserts, Germany	350
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2007-2012	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, Chilled Dairy Desserts, Germany	350
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	
Total demand 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market consumption, 2007	
Total Market Value, Chilled Dairy Desserts, Germany	350
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market expenditure, 2007	
Company Market Shares, Chilled Dairy Desserts, Germany	351
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, Chilled Dairy Desserts, Germany	351
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	
Major Brands, Chilled Dairy Desserts, Germany	352
Major Brands Listing by Company and Subsidiary, 2008	
9.3 Powdered Desserts Market Profile	353

Periscope for Powdered Desserts in Germany	353
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, Powdered Desserts, Germany	354
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2007-2012	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, Powdered Desserts, Germany	354
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	
Total demand 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market consumption, 2007	
Total Market Value, Powdered Desserts, Germany	354
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market expenditure, 2007	
Company Market Shares, Powdered Desserts, Germany	355
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, Powdered Desserts, Germany	355
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	
Major Brands, Powdered Desserts, Germany	356
Major Brands Listing by Company and Subsidiary, 2008	
10. All Oils & Fats Market Profile	357
Periscope for All Oils & Fats in Germany	357
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, All Oils & Fats, Germany	358
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2007-2012	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, All Oils & Fats, Germany	358
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	
Total demand 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market consumption, 2007	
Total Market Value, All Oils & Fats, Germany	358
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market expenditure, 2007	
Company Market Shares, All Oils & Fats, Germany	359
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, All Oils & Fats, Germany	359
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	
10.1 All Butter Market Profile	361
Periscope for All Butter in Germany	361
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	

Introduction, All Butter, Germany	362
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2007-2012	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, All Butter, Germany	362
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	
Total demand 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market consumption, 2007	
Total Market Value, All Butter, Germany	362
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market expenditure, 2007	
Company Market Shares, All Butter, Germany	363
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, All Butter, Germany	363
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	
10.11 Butter (standard) Market Profile	365
Periscope for Butter (standard) in Germany	365
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, Butter (standard), Germany	366
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2007-2012	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, Butter (standard), Germany	366
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	
Total demand 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market consumption, 2007	
Total Market Value, Butter (standard), Germany	366
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market expenditure, 2007	
Company Market Shares, Butter (standard), Germany	367
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, Butter (standard), Germany	367
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	
Major Brands, Butter (standard), Germany	368
Major Brands Listing by Company and Subsidiary, 2008	
10.12 Other Dairy Spreads Market Profile	369
Periscope for Other Dairy Spreads in Germany	369
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, Other Dairy Spreads, Germany	370
Detailed product definition, including local market particularities	

5-year regional and 25-country real annual % value total forecasts, 2007-2012	370
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, Other Dairy Spreads, Germany	370
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	
Total demand 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market consumption, 2007	
Total Market Value, Other Dairy Spreads, Germany	370
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market expenditure, 2007	
Company Market Shares, Other Dairy Spreads, Germany	371
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, Other Dairy Spreads, Germany	371
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	
Major Brands, Other Dairy Spreads, Germany	372
Major Brands Listing by Company and Subsidiary, 2008	
10.2 All Margarine Market Profile	373
Periscope for All Margarine in Germany	373
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, All Margarine, Germany	374
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2007-2012	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, All Margarine, Germany	374
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	
Total demand 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market consumption, 2007	
Total Market Value, All Margarine, Germany	374
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market expenditure, 2007	
Company Market Shares, All Margarine, Germany	375
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, All Margarine, Germany	375
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	
10.21 Margarine (standard) Market Profile	377
Periscope for Margarine (standard) in Germany	377
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, Margarine (standard), Germany	378
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2007-2012	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for	

all market data below provided	378
Total Market Volume, Margarine (standard), Germany	378
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	
Total demand 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market consumption, 2007	
Total Market Value, Margarine (standard), Germany	378
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market expenditure, 2007	
Company Market Shares, Margarine (standard), Germany	379
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, Margarine (standard), Germany	379
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	
Major Brands, Margarine (standard), Germany	380
Major Brands Listing by Company and Subsidiary, 2008	
10.22 Other Non-Dairy Spreads Market Profile	381
Periscope for Other Non-Dairy Spreads in Germany	381
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, Other Non-Dairy Spreads, Germany	382
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2007-2012	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, Other Non-Dairy Spreads, Germany	382
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	
Total demand 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market consumption, 2007	
Total Market Value, Other Non-Dairy Spreads, Germany	382
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market expenditure, 2007	
Company Market Shares, Other Non-Dairy Spreads, Germany	383
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, Other Non-Dairy Spreads, Germany	383
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	
Major Brands, Other Non-Dairy Spreads, Germany	384
Major Brands Listing by Company and Subsidiary, 2008	
10.3 All Edible Oils Market Profile	385
Periscope for All Edible Oils in Germany	385
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, All Edible Oils, Germany	386
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2007-2012	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for	

all market data below provided	386
Total Market Volume, All Edible Oils, Germany	386
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	
Total demand 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market consumption, 2007	
Total Market Value, All Edible Oils, Germany	386
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market expenditure, 2007	
Company Market Shares, All Edible Oils, Germany	387
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, All Edible Oils, Germany	387
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	
10.31 Olive Oil Market Profile	389
Periscope for Olive Oil in Germany	389
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, Olive Oil, Germany	390
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2007-2012	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, Olive Oil, Germany	390
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	
Total demand 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market consumption, 2007	
Total Market Value, Olive Oil, Germany	390
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market expenditure, 2007	
Company Market Shares, Olive Oil, Germany	391
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, Olive Oil, Germany	391
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	
Major Brands, Olive Oil, Germany	392
Major Brands Listing by Company and Subsidiary, 2008	
10.32 Other Oils Market Profile	393
Periscope for Other Oils in Germany	393
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, Other Oils, Germany	394
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2007-2012	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, Other Oils, Germany	394

Retail, Foodservice and Total Demand, 2002, 2006 and 2007	394
Total demand 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market consumption, 2007	
Total Market Value, Other Oils, Germany	394
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market expenditure, 2007	
Company Market Shares, Other Oils, Germany	395
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, Other Oils, Germany	395
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	
Major Brands, Other Oils, Germany	396
Major Brands Listing by Company and Subsidiary, 2008	
10.4 Cooking Fats (retail only) Market Profile	397
Periscope for Cooking Fats (retail only) in Germany	397
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, Cooking Fats (retail only), Germany	398
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2007-2012	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, Cooking Fats (retail only), Germany	398
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	
Total demand 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market consumption, 2007	
Total Market Value, Cooking Fats (retail only), Germany	398
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market expenditure, 2007	
Company Market Shares, Cooking Fats (retail only), Germany	399
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, Cooking Fats (retail only), Germany	399
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	
Major Brands, Cooking Fats (retail only), Germany	400
Major Brands Listing by Company and Subsidiary, 2008	
11. All Dressings & Condiments Market Profile	401
Periscope for All Dressings & Condiments in Germany	401
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, All Dressings & Condiments, Germany	402
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2007-2012	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, All Dressings & Condiments, Germany	402

Retail, Foodservice and Total Demand, 2002, 2006 and 2007	402
Total demand 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market consumption, 2007	
Total Market Value, All Dressings & Condiments, Germany	402
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market expenditure, 2007	
Company Market Shares, All Dressings & Condiments, Germany	403
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, All Dressings & Condiments, Germany	403
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	
11.1 Mayonnaise Market Profile	405
Periscope for Mayonnaise in Germany	405
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, Mayonnaise, Germany	406
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2007-2012	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, Mayonnaise, Germany	406
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	
Total demand 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market consumption, 2007	
Total Market Value, Mayonnaise, Germany	406
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market expenditure, 2007	
Company Market Shares, Mayonnaise, Germany	407
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, Mayonnaise, Germany	407
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	
Major Brands, Mayonnaise, Germany	408
Major Brands Listing by Company and Subsidiary, 2008	
11.2 Salad Dressings Market Profile	409
Periscope for Salad Dressings in Germany	409
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, Salad Dressings, Germany	410
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2007-2012	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, Salad Dressings, Germany	410
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	
Total demand 5-year growth rates, 2002-2007	

Per capita retail, foodservice and total market consumption, 2007	410
Total Market Value, Salad Dressings, Germany	410
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market expenditure, 2007	
Company Market Shares, Salad Dressings, Germany	411
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, Salad Dressings, Germany	411
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	
Major Brands, Salad Dressings, Germany	412
Major Brands Listing by Company and Subsidiary, 2008	
11.3 Ketchup Market Profile	413
Periscope for Ketchup in Germany	413
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, Ketchup, Germany	414
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2007-2012	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, Ketchup, Germany	414
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	
Total demand 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market consumption, 2007	
Total Market Value, Ketchup, Germany	414
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market expenditure, 2007	
Company Market Shares, Ketchup, Germany	415
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, Ketchup, Germany	415
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	
Major Brands, Ketchup, Germany	416
Major Brands Listing by Company and Subsidiary, 2008	
11.4 Vegetables in Vinegar Market Profile	417
Periscope for Vegetables in Vinegar in Germany	417
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, Vegetables in Vinegar, Germany	418
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2007-2012	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, Vegetables in Vinegar, Germany	418
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	
Total demand 5-year growth rates, 2002-2007	

Per capita retail, foodservice and total market consumption, 2007	418
Total Market Value, Vegetables in Vinegar, Germany	418
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market expenditure, 2007	
Company Market Shares, Vegetables in Vinegar, Germany	419
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, Vegetables in Vinegar, Germany	419
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	
Major Brands, Vegetables in Vinegar, Germany	420
Major Brands Listing by Company and Subsidiary, 2008	
11.5 Mustard Market Profile	421
Periscope for Mustard in Germany	421
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, Mustard, Germany	422
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2007-2012	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, Mustard, Germany	422
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	
Total demand 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market consumption, 2007	
Total Market Value, Mustard, Germany	422
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market expenditure, 2007	
Company Market Shares, Mustard, Germany	423
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, Mustard, Germany	423
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	
Major Brands, Mustard, Germany	424
Major Brands Listing by Company and Subsidiary, 2008	
11.6 Table Salt Market Profile	425
Periscope for Table Salt in Germany	425
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, Table Salt, Germany	426
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2007-2012	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, Table Salt, Germany	426
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	
Total demand 5-year growth rates, 2002-2007	

Per capita retail, foodservice and total market consumption, 2007	426
Total Market Value, Table Salt, Germany	426
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market expenditure, 2007	
Company Market Shares, Table Salt, Germany	427
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, Table Salt, Germany	427
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	
Major Brands, Table Salt, Germany	428
Major Brands Listing by Company and Subsidiary, 2008	
11.7 Herbs & Spices Market Profile	429
Periscope for Herbs & Spices in Germany	429
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, Herbs & Spices, Germany	430
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2007-2012	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, Herbs & Spices, Germany	430
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	
Total demand 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market consumption, 2007	
Total Market Value, Herbs & Spices, Germany	430
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market expenditure, 2007	
Company Market Shares, Herbs & Spices, Germany	431
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, Herbs & Spices, Germany	431
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	
Major Brands, Herbs & Spices, Germany	432
Major Brands Listing by Company and Subsidiary, 2008	
11.8 Vinegar Market Profile	433
Periscope for Vinegar in Germany	433
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, Vinegar, Germany	434
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2007-2012	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, Vinegar, Germany	434
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	
Total demand 5-year growth rates, 2002-2007	

Per capita retail, foodservice and total market consumption, 2007	434
Total Market Value, Vinegar, Germany	434
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market expenditure, 2007	
Company Market Shares, Vinegar, Germany	435
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, Vinegar, Germany	435
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	
Major Brands, Vinegar, Germany	436
Major Brands Listing by Company and Subsidiary, 2008	
12. All Soups & Sauces Market Profile	437
Periscope for All Soups & Sauces in Germany	437
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, All Soups & Sauces, Germany	438
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2007-2012	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, All Soups & Sauces, Germany	438
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	
Total demand 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market consumption, 2007	
Total Market Value, All Soups & Sauces, Germany	438
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market expenditure, 2007	
Company Market Shares, All Soups & Sauces, Germany	439
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, All Soups & Sauces, Germany	439
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	
12.1 Canned and Cartoned Soup Market Profile	441
Periscope for Canned and Cartoned Soup in Germany	441
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, Canned and Cartoned Soup, Germany	442
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2007-2012	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, Canned and Cartoned Soup, Germany	442
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	
Total demand 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market consumption, 2007	
Total Market Value, Canned and Cartoned Soup, Germany	442

Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	442
Total demand real 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market expenditure, 2007	
Company Market Shares, Canned and Cartoned Soup, Germany	443
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, Canned and Cartoned Soup, Germany	443
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	
Major Brands, Canned and Cartoned Soup, Germany	444
Major Brands Listing by Company and Subsidiary, 2008	
12.2 Dehydrated Soup Market Profile	445
Periscope for Dehydrated Soup in Germany	445
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, Dehydrated Soup, Germany	446
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2007-2012	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, Dehydrated Soup, Germany	446
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	
Total demand 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market consumption, 2007	
Total Market Value, Dehydrated Soup, Germany	446
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market expenditure, 2007	
Company Market Shares, Dehydrated Soup, Germany	447
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, Dehydrated Soup, Germany	447
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	
Major Brands, Dehydrated Soup, Germany	448
Major Brands Listing by Company and Subsidiary, 2008	
12.3 Frozen Soup Market Profile	449
Periscope for Frozen Soup in Germany	449
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, Frozen Soup, Germany	450
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2007-2012	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, Frozen Soup, Germany	450
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	
Total demand 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market consumption, 2007	
Total Market Value, Frozen Soup, Germany	450

Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	450
Total demand real 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market expenditure, 2007	
Company Market Shares, Frozen Soup, Germany	451
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, Frozen Soup, Germany	451
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	
Major Brands, Frozen Soup, Germany	452
Major Brands Listing by Company and Subsidiary, 2008	
12.4 All Canned & Cartoned Sauces Market Profile	453
Periscope for All Canned & Cartoned Sauces in Germany	453
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, All Canned & Cartoned Sauces, Germany	454
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2007-2012	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, All Canned & Cartoned Sauces, Germany	454
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	
Total demand 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market consumption, 2007	
Total Market Value, All Canned & Cartoned Sauces, Germany	454
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market expenditure, 2007	
Company Market Shares, All Canned & Cartoned Sauces, Germany	455
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, All Canned & Cartoned Sauces, Germany	455
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	
12.41 Canned Tomato Market Profile	457
Periscope for Canned Tomato in Germany	457
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, Canned Tomato, Germany	458
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2007-2012	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, Canned Tomato, Germany	458
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	
Total demand 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market consumption, 2007	
Total Market Value, Canned Tomato, Germany	458
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	

Per capita retail, foodservice and total market expenditure, 2007	458
Company Market Shares, Canned Tomato, Germany	459
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, Canned Tomato, Germany	459
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	
Major Brands, Canned Tomato, Germany	460
Major Brands Listing by Company and Subsidiary, 2008	
12.42 Tomato Concentrate Market Profile	461
Periscope for Tomato Concentrate in Germany	461
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, Tomato Concentrate, Germany	462
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2007-2012	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, Tomato Concentrate, Germany	462
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	
Total demand 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market consumption, 2007	
Total Market Value, Tomato Concentrate, Germany	462
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market expenditure, 2007	
Company Market Shares, Tomato Concentrate, Germany	463
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, Tomato Concentrate, Germany	463
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	
Major Brands, Tomato Concentrate, Germany	464
Major Brands Listing by Company and Subsidiary, 2008	
12.43 Pasta Sauces Market Profile	465
Periscope for Pasta Sauces in Germany	465
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, Pasta Sauces, Germany	466
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2007-2012	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, Pasta Sauces, Germany	466
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	
Total demand 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market consumption, 2007	
Total Market Value, Pasta Sauces, Germany	466
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	

Per capita retail, foodservice and total market expenditure, 2007	466
Company Market Shares, Pasta Sauces, Germany	467
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, Pasta Sauces, Germany	467
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	
Major Brands, Pasta Sauces, Germany	468
Major Brands Listing by Company and Subsidiary, 2008	
12.44 Other Canned Sauces Market Profile	469
Periscope for Other Canned Sauces in Germany	469
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, Other Canned Sauces, Germany	470
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2007-2012	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, Other Canned Sauces, Germany	470
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	
Total demand 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market consumption, 2007	
Total Market Value, Other Canned Sauces, Germany	470
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market expenditure, 2007	
Company Market Shares, Other Canned Sauces, Germany	471
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, Other Canned Sauces, Germany	471
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	
Major Brands, Other Canned Sauces, Germany	472
Major Brands Listing by Company and Subsidiary, 2008	
12.5 Dehydrated Sauces Market Profile	473
Periscope for Dehydrated Sauces in Germany	473
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, Dehydrated Sauces, Germany	474
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2007-2012	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, Dehydrated Sauces, Germany	474
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	
Total demand 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market consumption, 2007	
Total Market Value, Dehydrated Sauces, Germany	474
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	

Per capita retail, foodservice and total market expenditure, 2007	474
Company Market Shares, Dehydrated Sauces, Germany	475
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, Dehydrated Sauces, Germany	475
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	
Major Brands, Dehydrated Sauces, Germany	476
Major Brands Listing by Company and Subsidiary, 2008	
12.6 Bouillon Cubes Market Profile	477
Periscope for Bouillon Cubes in Germany	477
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, Bouillon Cubes, Germany	478
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2007-2012	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, Bouillon Cubes, Germany	478
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	
Total demand 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market consumption, 2007	
Total Market Value, Bouillon Cubes, Germany	478
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market expenditure, 2007	
Company Market Shares, Bouillon Cubes, Germany	479
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, Bouillon Cubes, Germany	479
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	
Major Brands, Bouillon Cubes, Germany	480
Major Brands Listing by Company and Subsidiary, 2008	
13. All Fresh & Processed Meat Market Profile	481
Periscope for All Fresh & Processed Meat in Germany	481
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, All Fresh & Processed Meat, Germany	482
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2007-2012	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, All Fresh & Processed Meat, Germany	482
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	
Total demand 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market consumption, 2007	
Total Market Value, All Fresh & Processed Meat, Germany	482
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	

Per capita retail, foodservice and total market expenditure, 2007	482
Company Market Shares, All Fresh & Processed Meat, Germany	483
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, All Fresh & Processed Meat, Germany	483
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	
13.1 All Fresh Meat Market Profile	485
Periscope for All Fresh Meat in Germany	485
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, All Fresh Meat, Germany	486
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2007-2012	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, All Fresh Meat, Germany	486
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	
Total demand 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market consumption, 2007	
Total Market Value, All Fresh Meat, Germany	486
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market expenditure, 2007	
Company Market Shares, All Fresh Meat, Germany	487
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, All Fresh Meat, Germany	487
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	
13.11 Beef Market Profile	489
Periscope for Beef in Germany	489
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, Beef, Germany	490
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2007-2012	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, Beef, Germany	490
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	
Total demand 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market consumption, 2007	
Total Market Value, Beef, Germany	490
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market expenditure, 2007	
Company Market Shares, Beef, Germany	491
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	

Distribution Channels, Beef, Germany	491
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	
Major Brands, Beef, Germany	492
Major Brands Listing by Company and Subsidiary, 2008	
13.12 Pork Market Profile	493
Periscope for Pork in Germany	493
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, Pork, Germany	494
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2007-2012	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, Pork, Germany	494
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	
Total demand 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market consumption, 2007	
Total Market Value, Pork, Germany	494
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market expenditure, 2007	
Company Market Shares, Pork, Germany	495
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, Pork, Germany	495
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	
Major Brands, Pork, Germany	496
Major Brands Listing by Company and Subsidiary, 2008	
13.13 Mutton Market Profile	497
Periscope for Mutton in Germany	497
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, Mutton, Germany	498
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2007-2012	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, Mutton, Germany	498
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	
Total demand 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market consumption, 2007	
Total Market Value, Mutton, Germany	498
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market expenditure, 2007	
Company Market Shares, Mutton, Germany	499
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	

Distribution Channels, Mutton, Germany	499
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	
Major Brands, Mutton, Germany	500
Major Brands Listing by Company and Subsidiary, 2008	
13.14 Poultry Market Profile	501
Periscope for Poultry in Germany	501
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, Poultry, Germany	502
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2007-2012	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, Poultry, Germany	502
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	
Total demand 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market consumption, 2007	
Total Market Value, Poultry, Germany	502
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market expenditure, 2007	
Company Market Shares, Poultry, Germany	503
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, Poultry, Germany	503
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	
Major Brands, Poultry, Germany	504
Major Brands Listing by Company and Subsidiary, 2008	
13.15 Other Fresh Meat Market Profile	505
Periscope for Other Fresh Meat in Germany	505
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, Other Fresh Meat, Germany	506
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2007-2012	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, Other Fresh Meat, Germany	506
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	
Total demand 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market consumption, 2007	
Total Market Value, Other Fresh Meat, Germany	506
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market expenditure, 2007	
Company Market Shares, Other Fresh Meat, Germany	507
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	

Distribution Channels, Other Fresh Meat, Germany	507
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	
Major Brands, Other Fresh Meat, Germany	508
Major Brands Listing by Company and Subsidiary, 2008	
13.2 All Processed Meat Market Profile	509
Periscope for All Processed Meat in Germany	509
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, All Processed Meat, Germany	510
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2007-2012	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, All Processed Meat, Germany	510
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	
Total demand 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market consumption, 2007	
Total Market Value, All Processed Meat, Germany	510
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market expenditure, 2007	
Company Market Shares, All Processed Meat, Germany	511
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, All Processed Meat, Germany	511
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	
13.21 Canned Meat Market Profile	513
Periscope for Canned Meat in Germany	513
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, Canned Meat, Germany	514
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2007-2012	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, Canned Meat, Germany	514
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	
Total demand 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market consumption, 2007	
Total Market Value, Canned Meat, Germany	514
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market expenditure, 2007	
Company Market Shares, Canned Meat, Germany	515
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, Canned Meat, Germany	515
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	

Major Brands, Canned Meat, Germany	516
Major Brands Listing by Company and Subsidiary, 2008	
13.22 Frozen Convenience meat Market Profile	517
Periscope for Frozen Convenience meat in Germany	517
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, Frozen Convenience meat, Germany	518
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2007-2012	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, Frozen Convenience meat, Germany	518
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	
Total demand 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market consumption, 2007	
Total Market Value, Frozen Convenience meat, Germany	518
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market expenditure, 2007	
Company Market Shares, Frozen Convenience meat, Germany	519
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, Frozen Convenience meat, Germany	519
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	
Major Brands, Frozen Convenience meat, Germany	520
Major Brands Listing by Company and Subsidiary, 2008	
13.23 Cured Meat Market Profile	521
Periscope for Cured Meat in Germany	521
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, Cured Meat, Germany	522
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2007-2012	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, Cured Meat, Germany	522
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	
Total demand 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market consumption, 2007	
Total Market Value, Cured Meat, Germany	522
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market expenditure, 2007	
Company Market Shares, Cured Meat, Germany	523
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, Cured Meat, Germany	523
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	

Major Brands, Cured Meat, Germany	524
Major Brands Listing by Company and Subsidiary, 2008	
13.24 Bacon & Ham Market Profile	525
Periscope for Bacon & Ham in Germany	525
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, Bacon & Ham, Germany	526
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2007-2012	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, Bacon & Ham, Germany	526
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	
Total demand 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market consumption, 2007	
Total Market Value, Bacon & Ham, Germany	526
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market expenditure, 2007	
Company Market Shares, Bacon & Ham, Germany	527
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, Bacon & Ham, Germany	527
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	
Major Brands, Bacon & Ham, Germany	528
Major Brands Listing by Company and Subsidiary, 2008	
13.25 Delicatessen Products Market Profile	529
Periscope for Delicatessen Products in Germany	529
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, Delicatessen Products, Germany	530
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2007-2012	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, Delicatessen Products, Germany	530
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	
Total demand 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market consumption, 2007	
Total Market Value, Delicatessen Products, Germany	530
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market expenditure, 2007	
Company Market Shares, Delicatessen Products, Germany	531
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, Delicatessen Products, Germany	531
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	

Major Brands, Delicatessen Products, Germany	532
Major Brands Listing by Company and Subsidiary, 2008	
14. All Fresh & Processed Fish Market Profile	533
Periscope for All Fresh & Processed Fish in Germany	533
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, All Fresh & Processed Fish, Germany	534
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2007-2012	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, All Fresh & Processed Fish, Germany	534
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	
Total demand 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market consumption, 2007	
Total Market Value, All Fresh & Processed Fish, Germany	534
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market expenditure, 2007	
Company Market Shares, All Fresh & Processed Fish, Germany	535
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, All Fresh & Processed Fish, Germany	535
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	
14.1 Fresh Fish Market Profile	537
Periscope for Fresh Fish in Germany	537
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, Fresh Fish, Germany	538
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2007-2012	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, Fresh Fish, Germany	538
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	
Total demand 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market consumption, 2007	
Total Market Value, Fresh Fish, Germany	538
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market expenditure, 2007	
Company Market Shares, Fresh Fish, Germany	539
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, Fresh Fish, Germany	539
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	
Major Brands, Fresh Fish, Germany	540
Major Brands Listing by Company and Subsidiary, 2008	

14.2 Canned Fish Market Profile	541
Periscope for Canned Fish in Germany	541
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, Canned Fish, Germany	542
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2007-2012	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, Canned Fish, Germany	542
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	
Total demand 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market consumption, 2007	
Total Market Value, Canned Fish, Germany	542
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market expenditure, 2007	
Company Market Shares, Canned Fish, Germany	543
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, Canned Fish, Germany	543
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	
Major Brands, Canned Fish, Germany	544
Major Brands Listing by Company and Subsidiary, 2008	
14.3 Frozen Fish Market Profile	545
Periscope for Frozen Fish in Germany	545
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, Frozen Fish, Germany	546
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2007-2012	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, Frozen Fish, Germany	546
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	
Total demand 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market consumption, 2007	
Total Market Value, Frozen Fish, Germany	546
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market expenditure, 2007	
Company Market Shares, Frozen Fish, Germany	547
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, Frozen Fish, Germany	547
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	
Major Brands, Frozen Fish, Germany	548
Major Brands Listing by Company and Subsidiary, 2008	

14.4 Other Processed Fish Market Profile	549
Periscope for Other Processed Fish in Germany	549
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, Other Processed Fish, Germany	550
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2007-2012	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, Other Processed Fish, Germany	550
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	
Total demand 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market consumption, 2007	
Total Market Value, Other Processed Fish, Germany	550
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market expenditure, 2007	
Company Market Shares, Other Processed Fish, Germany	551
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, Other Processed Fish, Germany	551
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	
Major Brands, Other Processed Fish, Germany	552
Major Brands Listing by Company and Subsidiary, 2008	
15. All Ready Meals Market Profile	553
Periscope for All Ready Meals in Germany	553
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, All Ready Meals, Germany	554
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2007-2012	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, All Ready Meals, Germany	554
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	
Total demand 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market consumption, 2007	
Total Market Value, All Ready Meals, Germany	554
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market expenditure, 2007	
Company Market Shares, All Ready Meals, Germany	555
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, All Ready Meals, Germany	555
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	
15.1 Canned Pasta Market Profile	557
Periscope for Canned Pasta in Germany	557

Summary Flowchart of Major Suppliers, Demand and Distribution Channels	557
Introduction, Canned Pasta, Germany	558
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2007-2012	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, Canned Pasta, Germany	558
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	
Total demand 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market consumption, 2007	
Total Market Value, Canned Pasta, Germany	558
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market expenditure, 2007	
Company Market Shares, Canned Pasta, Germany	559
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, Canned Pasta, Germany	559
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	
Major Brands, Canned Pasta, Germany	560
Major Brands Listing by Company and Subsidiary, 2008	
15.2 Canned Ready Meals Market Profile	561
Periscope for Canned Ready Meals in Germany	561
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, Canned Ready Meals, Germany	562
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2007-2012	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, Canned Ready Meals, Germany	562
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	
Total demand 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market consumption, 2007	
Total Market Value, Canned Ready Meals, Germany	562
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market expenditure, 2007	
Company Market Shares, Canned Ready Meals, Germany	563
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, Canned Ready Meals, Germany	563
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	
Major Brands, Canned Ready Meals, Germany	564
Major Brands Listing by Company and Subsidiary, 2008	
15.3 Dehydrated Ready Meals Market Profile	565
Periscope for Dehydrated Ready Meals in Germany	565

Summary Flowchart of Major Suppliers, Demand and Distribution Channels	565
Introduction, Dehydrated Ready Meals, Germany	566
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2007-2012	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, Dehydrated Ready Meals, Germany	566
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	
Total demand 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market consumption, 2007	
Total Market Value, Dehydrated Ready Meals, Germany	566
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market expenditure, 2007	
Company Market Shares, Dehydrated Ready Meals, Germany	567
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, Dehydrated Ready Meals, Germany	567
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	
Major Brands, Dehydrated Ready Meals, Germany	568
Major Brands Listing by Company and Subsidiary, 2008	
15.4 Frozen Pizza Market Profile	569
Periscope for Frozen Pizza in Germany	569
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, Frozen Pizza, Germany	570
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2007-2012	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, Frozen Pizza, Germany	570
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	
Total demand 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market consumption, 2007	
Total Market Value, Frozen Pizza, Germany	570
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market expenditure, 2007	
Company Market Shares, Frozen Pizza, Germany	571
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, Frozen Pizza, Germany	571
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	
Major Brands, Frozen Pizza, Germany	572
Major Brands Listing by Company and Subsidiary, 2008	
15.5 Frozen Ready Meals Market Profile	573
Periscope for Frozen Ready Meals in Germany	573

Summary Flowchart of Major Suppliers, Demand and Distribution Channels	573
Introduction, Frozen Ready Meals, Germany	574
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2007-2012	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, Frozen Ready Meals, Germany	574
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	
Total demand 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market consumption, 2007	
Total Market Value, Frozen Ready Meals, Germany	574
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market expenditure, 2007	
Company Market Shares, Frozen Ready Meals, Germany	575
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, Frozen Ready Meals, Germany	575
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	
Major Brands, Frozen Ready Meals, Germany	576
Major Brands Listing by Company and Subsidiary, 2008	
15.6 Chilled Ready Meals Market Profile	577
Periscope for Chilled Ready Meals in Germany	577
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, Chilled Ready Meals, Germany	578
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2007-2012	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, Chilled Ready Meals, Germany	578
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	
Total demand 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market consumption, 2007	
Total Market Value, Chilled Ready Meals, Germany	578
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market expenditure, 2007	
Company Market Shares, Chilled Ready Meals, Germany	579
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, Chilled Ready Meals, Germany	579
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	
Major Brands, Chilled Ready Meals, Germany	580
Major Brands Listing by Company and Subsidiary, 2008	
15.7 Sandwiches Market Profile	581
Periscope for Sandwiches in Germany	581

Summary Flowchart of Major Suppliers, Demand and Distribution Channels	581
Introduction, Sandwiches, Germany	582
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2007-2012	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, Sandwiches, Germany	582
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	
Total demand 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market consumption, 2007	
Total Market Value, Sandwiches, Germany	582
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market expenditure, 2007	
Company Market Shares, Sandwiches, Germany	583
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, Sandwiches, Germany	583
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	
Major Brands, Sandwiches, Germany	584
Major Brands Listing by Company and Subsidiary, 2008	
16. All Hot Beverages Market Profile	585
Periscope for All Hot Beverages in Germany	585
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, All Hot Beverages, Germany	586
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2007-2012	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, All Hot Beverages, Germany	586
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	
Total demand 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market consumption, 2007	
Total Market Value, All Hot Beverages, Germany	586
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market expenditure, 2007	
Company Market Shares, All Hot Beverages, Germany	587
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, All Hot Beverages, Germany	587
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	
16.1 Bean and Ground Coffee Market Profile	589
Periscope for Bean and Ground Coffee in Germany	589
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, Bean and Ground Coffee, Germany	590

Detailed product definition, including local market particularities	590
5-year regional and 25-country real annual % value total forecasts, 2007-2012	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, Bean and Ground Coffee, Germany	590
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	
Total demand 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market consumption, 2007	
Total Market Value, Bean and Ground Coffee, Germany	590
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market expenditure, 2007	
Company Market Shares, Bean and Ground Coffee, Germany	591
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, Bean and Ground Coffee, Germany	591
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	
Major Brands, Bean and Ground Coffee, Germany	592
Major Brands Listing by Company and Subsidiary, 2008	
16.2 Soluble Coffee Market Profile	593
Periscope for Soluble Coffee in Germany	593
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, Soluble Coffee, Germany	594
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2007-2012	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, Soluble Coffee, Germany	594
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	
Total demand 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market consumption, 2007	
Total Market Value, Soluble Coffee, Germany	594
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market expenditure, 2007	
Company Market Shares, Soluble Coffee, Germany	595
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, Soluble Coffee, Germany	595
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	
Major Brands, Soluble Coffee, Germany	596
Major Brands Listing by Company and Subsidiary, 2008	
16.3 Coffee Substitutes Market Profile	597
Periscope for Coffee Substitutes in Germany	597
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, Coffee Substitutes, Germany	598

Detailed product definition, including local market particularities	598
5-year regional and 25-country real annual % value total forecasts, 2007-2012	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, Coffee Substitutes, Germany	598
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	
Total demand 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market consumption, 2007	
Total Market Value, Coffee Substitutes, Germany	598
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market expenditure, 2007	
Company Market Shares, Coffee Substitutes, Germany	599
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, Coffee Substitutes, Germany	599
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	
Major Brands, Coffee Substitutes, Germany	600
Major Brands Listing by Company and Subsidiary, 2008	
16.4 Black Tea Market Profile	601
Periscope for Black Tea in Germany	601
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, Black Tea, Germany	602
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2007-2012	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, Black Tea, Germany	602
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	
Total demand 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market consumption, 2007	
Total Market Value, Black Tea, Germany	602
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market expenditure, 2007	
Company Market Shares, Black Tea, Germany	603
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, Black Tea, Germany	603
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	
Major Brands, Black Tea, Germany	604
Major Brands Listing by Company and Subsidiary, 2008	
16.5 Herbal Teas Market Profile	605
Periscope for Herbal Teas in Germany	605
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, Herbal Teas, Germany	606

Detailed product definition, including local market particularities	606
5-year regional and 25-country real annual % value total forecasts, 2007-2012	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, Herbal Teas, Germany	606
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	
Total demand 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market consumption, 2007	
Total Market Value, Herbal Teas, Germany	606
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market expenditure, 2007	
Company Market Shares, Herbal Teas, Germany	607
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, Herbal Teas, Germany	607
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	
Major Brands, Herbal Teas, Germany	608
Major Brands Listing by Company and Subsidiary, 2008	
16.6 Powd. Choc. & Malted Drinks Market Profile	609
Periscope for Powd. Choc. & Malted Drinks in Germany	609
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, Powd. Choc. & Malted Drinks, Germany	610
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2007-2012	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, Powd. Choc. & Malted Drinks, Germany	610
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	
Total demand 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market consumption, 2007	
Total Market Value, Powd. Choc. & Malted Drinks, Germany	610
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market expenditure, 2007	
Company Market Shares, Powd. Choc. & Malted Drinks, Germany	611
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, Powd. Choc. & Malted Drinks, Germany	611
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	
Major Brands, Powd. Choc. & Malted Drinks, Germany	612
Major Brands Listing by Company and Subsidiary, 2008	
17. All Soft Drinks & Juices Market Profile	613
Periscope for All Soft Drinks & Juices in Germany	613
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, All Soft Drinks & Juices, Germany	614

Detailed product definition, including local market particularities	614
5-year regional and 25-country real annual % value total forecasts, 2007-2012	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, All Soft Drinks & Juices, Germany	614
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	
Total demand 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market consumption, 2007	
Total Market Value, All Soft Drinks & Juices, Germany	614
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market expenditure, 2007	
Company Market Shares, All Soft Drinks & Juices, Germany	615
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, All Soft Drinks & Juices, Germany	615
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	
17.1 Mineral Water Market Profile	617
Periscope for Mineral Water in Germany	617
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, Mineral Water, Germany	618
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2007-2012	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, Mineral Water, Germany	618
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	
Total demand 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market consumption, 2007	
Total Market Value, Mineral Water, Germany	618
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market expenditure, 2007	
Company Market Shares, Mineral Water, Germany	619
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, Mineral Water, Germany	619
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	
Major Brands, Mineral Water, Germany	620
Major Brands Listing by Company and Subsidiary, 2008	
17.2 Soft Drinks Market Profile	621
Periscope for Soft Drinks in Germany	621
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, Soft Drinks, Germany	622
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2007-2012	

Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	622
Total Market Volume, Soft Drinks, Germany	622
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	
Total demand 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market consumption, 2007	
Total Market Value, Soft Drinks, Germany	622
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market expenditure, 2007	
Company Market Shares, Soft Drinks, Germany	623
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, Soft Drinks, Germany	623
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	
Major Brands, Soft Drinks, Germany	624
Major Brands Listing by Company and Subsidiary, 2008	
17.3 Fruit Juices and Drinks Market Profile	625
Periscope for Fruit Juices and Drinks in Germany	625
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, Fruit Juices and Drinks, Germany	626
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2007-2012	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, Fruit Juices and Drinks, Germany	626
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	
Total demand 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market consumption, 2007	
Total Market Value, Fruit Juices and Drinks, Germany	626
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market expenditure, 2007	
Company Market Shares, Fruit Juices and Drinks, Germany	627
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, Fruit Juices and Drinks, Germany	627
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	
17.31 Fruit Juices Market Profile	629
Periscope for Fruit Juices in Germany	629
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, Fruit Juices, Germany	630
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2007-2012	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	

Total Market Volume, Fruit Juices, Germany	630
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	
Total demand 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market consumption, 2007	
Total Market Value, Fruit Juices, Germany	630
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market expenditure, 2007	
Company Market Shares, Fruit Juices, Germany	631
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, Fruit Juices, Germany	631
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	
Major Brands, Fruit Juices, Germany	632
Major Brands Listing by Company and Subsidiary, 2008	
17.32 Fruit Drinks Market Profile	633
Periscope for Fruit Drinks in Germany	633
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, Fruit Drinks, Germany	634
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2007-2012	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, Fruit Drinks, Germany	634
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	
Total demand 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market consumption, 2007	
Total Market Value, Fruit Drinks, Germany	634
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market expenditure, 2007	
Company Market Shares, Fruit Drinks, Germany	635
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, Fruit Drinks, Germany	635
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	
Major Brands, Fruit Drinks, Germany	636
Major Brands Listing by Company and Subsidiary, 2008	
17.4 Squashes and Concentrates Market Profile	637
Periscope for Squashes and Concentrates in Germany	637
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, Squashes and Concentrates, Germany	638
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2007-2012	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	

Total Market Volume, Squashes and Concentrates, Germany	638
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	
Total demand 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market consumption, 2007	
Total Market Value, Squashes and Concentrates, Germany	638
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market expenditure, 2007	
Company Market Shares, Squashes and Concentrates, Germany	639
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, Squashes and Concentrates, Germany	639
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	
Major Brands, Squashes and Concentrates, Germany	640
Major Brands Listing by Company and Subsidiary, 2008	
17.5 Health & Sports Drinks Market Profile	641
Periscope for Health & Sports Drinks in Germany	641
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, Health & Sports Drinks, Germany	642
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2007-2012	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, Health & Sports Drinks, Germany	642
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	
Total demand 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market consumption, 2007	
Total Market Value, Health & Sports Drinks, Germany	642
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market expenditure, 2007	
Company Market Shares, Health & Sports Drinks, Germany	643
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, Health & Sports Drinks, Germany	643
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	
Major Brands, Health & Sports Drinks, Germany	644
Major Brands Listing by Company and Subsidiary, 2008	
17.6 Iced Tea Market Profile	645
Periscope for Iced Tea in Germany	645
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, Iced Tea, Germany	646
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2007-2012	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	

Total Market Volume, Iced Tea, Germany	646
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	
Total demand 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market consumption, 2007	
Total Market Value, Iced Tea, Germany	646
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market expenditure, 2007	
Company Market Shares, Iced Tea, Germany	647
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, Iced Tea, Germany	647
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	
Major Brands, Iced Tea, Germany	648
Major Brands Listing by Company and Subsidiary, 2008	
18. All Alcoholic Beverages Market Profile	649
Periscope for All Alcoholic Beverages in Germany	649
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, All Alcoholic Beverages, Germany	650
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2007-2012	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, All Alcoholic Beverages, Germany	650
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	
Total demand 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market consumption, 2007	
Total Market Value, All Alcoholic Beverages, Germany	650
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market expenditure, 2007	
Company Market Shares, All Alcoholic Beverages, Germany	651
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, All Alcoholic Beverages, Germany	651
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	
18.1 Beer Market Profile	653
Periscope for Beer in Germany	653
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, Beer, Germany	654
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2007-2012	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, Beer, Germany	654
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	

Total demand 5-year growth rates, 2002-2007	654
Per capita retail, foodservice and total market consumption, 2007	
Total Market Value, Beer, Germany	654
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market expenditure, 2007	
Company Market Shares, Beer, Germany	655
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, Beer, Germany	655
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	
Major Brands, Beer, Germany	656
Major Brands Listing by Company and Subsidiary, 2008	
Major Brands, Beer, Germany (continued)	657
Major Brands Listing by Company and Subsidiary, 2008	
18.2 Wine Market Profile	659
Periscope for Wine in Germany	659
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, Wine, Germany	660
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2007-2012	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, Wine, Germany	660
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	
Total demand 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market consumption, 2007	
Total Market Value, Wine, Germany	660
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market expenditure, 2007	
Company Market Shares, Wine, Germany	661
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, Wine, Germany	661
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	
18.21 Still Wine Market Profile	663
Periscope for Still Wine in Germany	663
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, Still Wine, Germany	664
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2007-2012	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, Still Wine, Germany	664
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	

Total demand 5-year growth rates, 2002-2007	664
Per capita retail, foodservice and total market consumption, 2007	
Total Market Value, Still Wine, Germany	664
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market expenditure, 2007	
Company Market Shares, Still Wine, Germany	665
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, Still Wine, Germany	665
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	
Major Brands, Still Wine, Germany	666
Major Brands Listing by Company and Subsidiary, 2008	
18.22 Sparkling Wine Market Profile	667
Periscope for Sparkling Wine in Germany	667
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, Sparkling Wine, Germany	668
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2007-2012	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, Sparkling Wine, Germany	668
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	
Total demand 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market consumption, 2007	
Total Market Value, Sparkling Wine, Germany	668
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market expenditure, 2007	
Company Market Shares, Sparkling Wine, Germany	669
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, Sparkling Wine, Germany	669
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	
Major Brands, Sparkling Wine, Germany	670
Major Brands Listing by Company and Subsidiary, 2008	
18.3 Aperitifs & Spirits Market Profile	671
Periscope for Aperitifs & Spirits in Germany	671
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, Aperitifs & Spirits, Germany	672
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2007-2012	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, Aperitifs & Spirits, Germany	672
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	

Total demand 5-year growth rates, 2002-2007	672
Per capita retail, foodservice and total market consumption, 2007	
Total Market Value, Aperitifs & Spirits, Germany	672
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market expenditure, 2007	
Company Market Shares, Aperitifs & Spirits, Germany	673
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, Aperitifs & Spirits, Germany	673
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	
Major Brands, Aperitifs & Spirits, Germany	674
Major Brands Listing by Company and Subsidiary, 2008	
Major Brands, Aperitifs & Spirits, Germany (continued)	675
Major Brands Listing by Company and Subsidiary, 2008	
19. All Baby Foods Market Profile	677
Periscope for All Baby Foods in Germany	677
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, All Baby Foods, Germany	678
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2007-2012	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, All Baby Foods, Germany	678
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	
Total demand 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market consumption, 2007	
Total Market Value, All Baby Foods, Germany	678
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market expenditure, 2007	
Company Market Shares, All Baby Foods, Germany	679
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, All Baby Foods, Germany	679
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	
19.1 Baby Jars Market Profile	681
Periscope for Baby Jars in Germany	681
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, Baby Jars, Germany	682
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2007-2012	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, Baby Jars, Germany	682
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	

Total demand 5-year growth rates, 2002-2007	682
Per capita retail, foodservice and total market consumption, 2007	
Total Market Value, Baby Jars, Germany	682
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market expenditure, 2007	
Company Market Shares, Baby Jars, Germany	683
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, Baby Jars, Germany	683
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	
Major Brands, Baby Jars, Germany	684
Major Brands Listing by Company and Subsidiary, 2008	
19.2 Baby Milks Market Profile	685
Periscope for Baby Milks in Germany	685
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, Baby Milks, Germany	686
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2007-2012	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, Baby Milks, Germany	686
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	
Total demand 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market consumption, 2007	
Total Market Value, Baby Milks, Germany	686
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market expenditure, 2007	
Company Market Shares, Baby Milks, Germany	687
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, Baby Milks, Germany	687
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	
Major Brands, Baby Milks, Germany	688
Major Brands Listing by Company and Subsidiary, 2008	
19.3 Other Baby Foods Market Profile	689
Periscope for Other Baby Foods in Germany	689
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, Other Baby Foods, Germany	690
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2007-2012	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, Other Baby Foods, Germany	690
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	

Total demand 5-year growth rates, 2002-2007	690
Per capita retail, foodservice and total market consumption, 2007	
Total Market Value, Other Baby Foods, Germany	690
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	
Per capita retail, foodservice and total market expenditure, 2007	
Company Market Shares, Other Baby Foods, Germany	691
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, Other Baby Foods, Germany	691
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	
Major Brands, Other Baby Foods, Germany	692
Major Brands Listing by Company and Subsidiary, 2008	
20. All Petfoods Market Profile	693
Periscope for All Petfoods in Germany	693
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, All Petfoods, Germany	694
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2007-2012	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, All Petfoods, Germany	694
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	
Total demand 5-year growth rates, 2002-2007	
Per pet retail, foodservice and total market consumption, 2007	
Total Market Value, All Petfoods, Germany	694
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	
Per pet retail, foodservice and total market expenditure, 2007	
Company Market Shares, All Petfoods, Germany	695
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, All Petfoods, Germany	695
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	
20.1 Canned Cat Food Market Profile	697
Periscope for Canned Cat Food in Germany	697
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, Canned Cat Food, Germany	698
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2007-2012	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, Canned Cat Food, Germany	698
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	
Total demand 5-year growth rates, 2002-2007	
Per cat retail, foodservice and total market consumption, 2007	

Total Market Value, Canned Cat Food, Germany	698
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	
Per cat retail, foodservice and total market expenditure, 2007	
Company Market Shares, Canned Cat Food, Germany	699
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, Canned Cat Food, Germany	699
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	
Major Brands, Canned Cat Food, Germany	700
Major Brands Listing by Company and Subsidiary, 2008	
20.2 Canned Dog Food Market Profile	701
Periscope for Canned Dog Food in Germany	701
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, Canned Dog Food, Germany	702
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2007-2012	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, Canned Dog Food, Germany	702
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	
Total demand 5-year growth rates, 2002-2007	
Per dog retail, foodservice and total market consumption, 2007	
Total Market Value, Canned Dog Food, Germany	702
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	
Per dog retail, foodservice and total market expenditure, 2007	
Company Market Shares, Canned Dog Food, Germany	703
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, Canned Dog Food, Germany	703
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	
Major Brands, Canned Dog Food, Germany	704
Major Brands Listing by Company and Subsidiary, 2008	
20.3 Dry/Semi-Moist Cat Food Market Profile	705
Periscope for Dry/Semi-Moist Cat Food in Germany	705
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, Dry/Semi-Moist Cat Food, Germany	706
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2007-2012	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, Dry/Semi-Moist Cat Food, Germany	706
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	
Total demand 5-year growth rates, 2002-2007	
Per cat retail, foodservice and total market consumption, 2007	

Total Market Value, Dry/Semi-Moist Cat Food, Germany	706
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	
Per cat retail, foodservice and total market expenditure, 2007	
Company Market Shares, Dry/Semi-Moist Cat Food, Germany	707
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, Dry/Semi-Moist Cat Food, Germany	707
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	
Major Brands, Dry/Semi-Moist Cat Food, Germany	708
Major Brands Listing by Company and Subsidiary, 2008	
20.4 Dry/Semi-Moist Dog food Market Profile	709
Periscope for Dry/Semi-Moist Dog food in Germany	709
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, Dry/Semi-Moist Dog food, Germany	710
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2007-2012	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, Dry/Semi-Moist Dog food, Germany	710
Retail, Foodservice and Total Demand, 2002, 2006 and 2007	
Total demand 5-year growth rates, 2002-2007	
Per dog retail, foodservice and total market consumption, 2007	
Total Market Value, Dry/Semi-Moist Dog food, Germany	710
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2002, 2006 and 2007	
Total demand real 5-year growth rates, 2002-2007	
Per dog retail, foodservice and total market expenditure, 2007	
Company Market Shares, Dry/Semi-Moist Dog food, Germany	711
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, Dry/Semi-Moist Dog food, Germany	711
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2008	
Major Brands, Dry/Semi-Moist Dog food, Germany	712
Major Brands Listing by Company and Subsidiary, 2008	
Company Profiles in Germany	713
ALL companies and subsidiaries identified in the markets covered listed	
Holding Company Country and Product Market Shares & Rankings (updated monthly)	
Note: Applying 2008 Company Market Shares to 2007 Market Value data	
11er Nahrungsm. to AVA	714
Abbelen to Adelholzener Alpenquelle	715
Adler to Agrolimen	716
Agrolimen to Alfesca	717
Alfesca to Andechser	718
Andechser to Apetito	719
Apetito to Ardovries	720

Arena Holding to Arla Foods	721
Aromatique to Aurelius	722
Aurelius to Baarssen	723
Bacardi to Bahlsen Süßwaren	724
Bahlsen Süßwaren to Barry Callebaut	725
Barry Callebaut to Bayer. Milchind.	726
Bayer. Milchind. to Beck	727
Becker to Berger Wild	728
Bergland. Rottaler to Bimmerle	729
Biophar to Bocchi	730
Bodeta to Bolton	731
Bomba to Boschi	732
Boschi to Brokelmann	733
Brown- Forman to Burkhardt	734
Bäko-Z. West to CSM	735
CVC Capital to Campari	736
Campari to Campbell Soup	737
Campbell Soup to Campina	738
Campina to Carbery	739
Carlsberg to Cobracrest	740
Coca-Cola to Conserve Mediter.	741
Conserve Mediter. to Coopagri Bretagne	742
Coppen. & Wiese to DMK	743
DMK to Danish Crown	744
Danish Crown to Danone	745
Danone to De Frites-specialist	746
De Kuyper to Develey	747
Develey to Dirkzwager	748
Dittmann Feinkost to Dr Quendt	749
Dr. Demuth to Döhler Citrus	750
Dölling Hareico to Eckes	751
Eckes to Edeka	752
Edeka Minden to Ehrmann	753
Ehrmann to Emil Färber	754
Ender & Partner to FL Group	755
FL Group to Ferrero	756
Final-realm to Francia	757
Franken Brunnen to Fresh Del Monte	758
Frida Frenzel to Friesland Coberco	759
Frischback to Fromi	760
Frosta to Frühstücks Ei	761
Fuchs Gruppe to GEP	762
GIV to Gausepohl Fleisch	763
General Mills to Gläserne Meierei	764
Gläserne Meierei to Golßen	765
Golßen to Greenery Int'l	766

Greenwich Holding to Gustav Wulff	767
Gut Adlerreuth to HMU	768
HMU to Hahne	769
Halber-städter to Hanseatische Chocolate	770
Harboe to Hassia & Luise	771
Hassia & Luise to Heinz	772
Heinz	773
Heinz to Hengsten-berg	774
Hengsten-berg to Heristo	775
Heristo	776
Hermes to Herres	777
Herzberger to Heyl	778
Heymann to Hipp	779
Hipp to Hochwald Gruppe	780
Hochwald Gruppe to Hofmann Menü	781
Hofmeister to Houber Brezel	782
Houdek to Hövelmann	783
Hövelmann to Hügli	784
Hügli to IDB	785
IDB to IFRC	786
IFRC to Inter-snack	787
Inter-snack to Jermi	788
Jung to Karlsberg	789
Karlsberg to Katjes Fassin	790
Keba to Klein Food	791
Kleinemas to Kourtakis	792
Kraft Foods	793
Kraft Foods	794
Krantz to Kuchen-meister	795
Kuchen-meister to Kühne	796
Kühne to L&R	797
LSH to Lactalis	798
Lactalis to Land-kost-Ei	799
Lange Stiftung to Lavazza	800
Lehman Brothers to Lindt & Sprüngli	801
Linkenheil to Lorenz Snack	802
Lotte to Lutèce	803
Löblein to MBU	804
MMG to Manner	805
Mantua Surgelati to Mars	806
Mars	807
Mast to May Holding	808
McCain to Meatpoint	809
Mederer to Meica Ammerl.	810
Meica Ammerl. to Merl	811
Mex-Al to Milchunion Hocheifel	812

Milchv. Nord to Molkereiz. Südwest	813
Monin to Mövenpick	814
Mövenpick to Müller	815
Müngersdorf to NPM Capital	816
NZ MPB to Nestlé	817
Nestlé	818
Nestlé	819
Nestlé	820
Nestlé	821
Nestlé to Nieder-egger	822
Niederrhein Gold to Nordmilch Union	823
Nordmilch Union to NÖM	824
Nölke to Oaktree Capital	825
Obstland to Oetker	826
Oetker	827
Oetker	828
Oetker to Orkla	829
Orkla to PHW Gruppe	830
PHW Gruppe to Paul Koerner	831
PepsiCo to Perdigao	832
Perfetti to Permira	833
Pernod Ricard to Peter zur Mühlen	834
Peter zur Mühlen to Pfeifer & Langen	835
Pfeifer & Langen to Portfolio Foods	836
Premier Foods to Rana	837
Raps to Reinert	838
Reinhard Wolf to Riegelein	839
Rimi to Ronnefeldt	840
Ronnefeldt to Rudolf Laschinger	841
Ruf to Rügen-walder	842
RügenGut to Sander Gourmet	843
Saputo to Scan-dairy	844
Scana No-liko Int'l to Schröder	845
Schulte to Schwälbchen	846
Schwälbchen to Siebrecht	847
Siegfried to Sonnen Bassermann	848
Sonnen Bassermann to Starbucks	849
Steg-meister to Stixi	850
Stixi to Storck	851
Storck to Stute	852
Stute to Südzucker	853
Südzucker to Tabletop Acquisitions	854
Tacke to Tanger-münde	855
Tanger-münde to Tengelmann	856
Ter Beke to Tirol Milch	857
Toms to Tönnies	858

Tönnies to Unilever	859
Unilever	860
Unilever	861
Unilever	862
Unilever	863
Unilever to Uniq	864
Uniq to VK Mühlen	865
VK Mühlen to Valora	866
Valora to Veltins Brauerei	867
Veltins Brauerei to Vion	868
Vion to Vitakraft	869
Vitakraft to Vortmeyer	870
Vosskötter to Walter Lang	871
Warner to Wernsing Feinkost	872
Wernsing Feinkost to Wessanen	873
West-fleisch to Wet Planet	874
Wiesbauer Wurst to Wismar	875
Wissen-bourg to Yakult Honsha	876
Yiotis to Zamek	877
Zamek to Zentis	878
Zentis to Zott	879
Zott to Über-kinger	880
Über-kinger to Ülzena Milchwerke	881

Major Brands And 'Who Owns Whom' in Germany 883

Holding Companies, Key Local Subsidiaries and Major Brands systematically identified
by product and country

Major Brands by Product Market	885
1.1 Flour (retail only)	885
1.2 Bread Products	885
1.3 Crispbread	885
1.4 Industrial Pastry	886
1.5 Biscuits	886
1.6 Frozen Pastry Products	887
1.71 Fresh Pasta	887
1.72 Dry Pasta	887
2.1 Rice	888
2.2 Breakfast Cereals	888
3.1 Sugar	889
3.2 Artificial Sweeteners	889
4.1 Jams & Marmalade	889
4.2 Honey	889
4.3 Other Sweet Spreads	890
5.11 Chewing Gum	890
5.12 Other Sugar Confectionery	890
5.21 Chocolate Countlines	891

5.22 Other Chocolate Confectionery	892
5.31 Nuts	893
5.32 Savoury Biscuits	893
5.33 Extruded Snacks	893
6.1 Fresh Fruit	893
6.2 Canned Fruit	893
6.3 Frozen Fruit	894
6.4 Fresh Vegetables	894
6.5 Canned Vegetables	894
6.6 Frozen Vegetables	894
6.7 Chilled Vegetables	895
7.1 Fresh Potatoes	895
7.2 Potato Crisps	895
7.3 Frozen Potato	895
7.4 Dehydrated Potato	896
8.1 Liquid Milk	896
8.2 Cream	896
8.3 Yoghurt	897
8.4 Condensed Milk	898
8.5 Powdered Milk	898
8.6 Fresh Cheese	898
8.7 Natural Cheese	899
8.8 Processed Cheese	900
8.9 Eggs	900
9.1 Ice Cream	901
9.2 Chilled Dairy Desserts	901
9.3 Powdered Desserts	902
10.11 Butter (standard)	902
10.12 Other Dairy Spreads	902
10.21 Margarine (standard)	903
10.22 Other Non-Dairy Spreads	903
10.31 Olive Oil	903
10.32 Other Oils	903
10.4 Cooking Fats (retail only)	903
11.1 Mayonnaise	903
11.2 Salad Dressings	904
11.3 Ketchup	904
11.4 Vegetables in Vinegar	904
11.5 Mustard	905
11.6 Table Salt	905
11.7 Herbs & Spices	905
11.8 Vinegar	905
12.1 Canned and Cartoned Soup	905
12.2 Dehydrated Soup	906
12.3 Frozen Soup	906
12.41 Canned Tomato	906

12.42 Tomato Concentrate	906
12.43 Pasta Sauces	906
12.44 Other Canned Sauces	907
12.5 Dehydrated Sauces	907
12.6 Bouillon Cubes	907
13.11 Beef	907
13.12 Pork	908
13.13 Mutton	908
13.14 Poultry	908
13.15 Other Fresh Meat	908
13.21 Canned Meat	909
13.22 Frozen Convenience meat	909
13.23 Cured Meat	909
13.24 Bacon & Ham	911
13.25 Delicatessen Products	911
14.1 Fresh Fish	912
14.2 Canned Fish	912
14.3 Frozen Fish	913
14.4 Other Processed Fish	913
15.1 Canned Pasta	913
15.2 Canned Ready Meals	914
15.3 Dehydrated Ready Meals	914
15.4 Frozen Pizza	914
15.5 Frozen Ready Meals	915
15.6 Chilled Ready Meals	916
15.7 Sandwiches	916
16.1 Bean and Ground Coffee	916
16.2 Soluble Coffee	917
16.3 Coffee Substitutes	917
16.4 Black Tea	917
16.5 Herbal Teas	918
16.6 Powd. Choc. & Malted Drinks	918
17.1 Mineral Water	918
17.2 Soft Drinks	919
17.31 Fruit Juices	920
17.32 Fruit Drinks	921
17.4 Squashes and Concentrates	921
17.5 Health & Sports Drinks	921
17.6 Iced Tea	922
18.1 Beer	922
18.21 Still Wine	924
18.22 Sparkling Wine	925
18.3 Aperitifs & Spirits	926
19.1 Baby Jars	927
19.2 Baby Milks	928
19.3 Other Baby Foods	928

20.1 Canned Cat Food	928
20.2 Canned Dog Food	928
20.3 Dry/Semi-Moist Cat Food	928
20.4 Dry/Semi-Moist Dog food	928
Major Brands by Holding Company	929
11er Nahrungsmittel to Andechser	929
Andechser to Artal	930
Artal to Bakkavör	931
Baldvinsson to Bayernland	932
Beauvais Catering to Bofrost	933
Bofrost to Bunge	934
Burkhardt to Campina	935
Campina to Conserve Mediterraneo	936
Consolidated Fruit to De Fritesspecialist	937
De Kuyper to Dr. Demuth	938
Dr. Doerr's to Eis Maier	939
Elsdorfer Feinkost to Fresh Del Monte	940
Frida Frenzel to Gausepohl Fleisch	941
Gausepohl Fleisch to Gruppo Italiano Vini	942
Gruyters to Hassia & Luisen	943
Haus Cramer to Heristo	944
Heristo to Hochland	945
Hochland to Hövelmann	946
Hügli to Intersnack	947
Intersnack to Keba	948
Kellogg to Kraft Foods	949
Kraft Foods to Kühne	950
Küppers Feinkost to Lekkerlano-Mitte	951
Lero Foods to Manner	952
Manner to McCain	953
McCain to Milchwerke Schwaben	954
Molk. Südwest to Nestlé	955
Nestlé to Nestlé	956
Nestlé to Nordmilch Union	957
Nordmilch Union to Oetker	958
Oetker to Oetker	959
Oetker to PepsiCo	960
Perdigao to Peter zur Mühlen	961
Peter zur Mühlen to Rhein Main Neckar Brauerei	962
Rhein Main Neckar Brauerei to Rémy Cointreau	963
Rémy Cointreau to Semper Idem Underberg	964
Semper Idem Underberg to Stoever	965
Stoever to Tchibo	966
Teekanne to Unilever	967
Unilever to Uniq	968
Uniq to Vion	969

Vion to Westfleisch	970
Westfleisch to Zentralschweizerischer Milchverband	971
Zentralschweizerischer Milchverband to Ülzena Milchwerke	972