25 Country Reports In Europe and North America

FFT's Annual Country Reports offer a complete hard data food & drink markets compilation of demand and supply running to some 700 - 1000 pages per country

Food & Drink Strategic Information Services

Country Report

Illustrative commented tables for:

Switzerland

PRINTED REPORTS

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

Try printing this Periscope !

SAMPLE REPORT
Note: Illustrative Data Only Presented

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FOREWORD

PRINTING YOUR REPORT

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

LEGAL, DISCLAIMER and COPYRIGHT

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.
Company Market Shares:	These are expressed as a percentage of the total retail and foodservice market by value. Company market shares of less then 3% should be regarded as indicative.

METHODOLOGY

All countries are surveyed 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.

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

146 Product Folios
A Country Report contains 146 4-Page "Product Market Folios" such as the one illustrated here.

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

ICE CREAM IN SWITZERLAND

MAJOR SUPPLIERS IN 2011 *

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

MARKETS IN 2010

UPDATE SCHEDULE
The demand database is updated by one year in April/May .

2010
Total Demand
Euros 353.3 million

Complete Demand Picture (of all human consumption):

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

2010 Retail Market	2010 Foodservice Market
Euros 204.4 million	Euros 148.9 million

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

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

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

Notes:
* Continuously updated, especially regarding recent major mergers and acquisitions.
† Share of total retail + foodservice market combined. As a share of retail only: 49.4%.
# Artisanal: Own-produced for own sale, for example independent craft bakers, or family ice cream parlours in Italy, considered here to be a single competitive entity/company).

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PERISCOPE DEMAND TABLE

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

9.1 ICE CREAM IN SWITZERLAND

Country: Switzerland — 2010 Country Population (million): 7.72 — Main Process Family: Dessert

Region: Western Europe — 2010 Region Population (million): 406.44 — Dry Weight Conversion Factor*: 0.75

Product: Ice Cream

Definition_: Dairy/non-dairy ice cream and sorbets, industrial and artisanal (including estimates of underrecor

Over 3500 country & product reports available.

NEW: FORECASTS !
Forecasts for next 3 years by volume and value provided for all country & product markets !

Full product definitions provided.

UPDATE SCHEDULE
The demand database is updated by one year in April / May

MARKET DEMAND BY VOLUME

	Historical Markets			Forecast Markets			Market Shares	Consump. Per Capita	Historical Growth [3]	Forecast Growth [3]
	2005	2009	2010	2011	2012	2013	2010	2010	2005-10	2010-13
	(m. litres)	(m. litres)	(m. litres)	(m. litres)	(m. litres)	(m. litres)	(%)	(litres)	(Av. Ann.)	(Av. Ann.)
Retail Market:	-	-	27.4	-	-	-	47.9%	3.55	-	-
Foodservice Market:	-	-	29.7	-	-	-	52.1%	3.85	-	-
Total Market:	**54.8**	**56.7**	**57.1**	**57.5**	**57.9**	**58.4**	**100.0%**	**7.40**	**0.80%**	**0.80%**
Other Countries:	3 183.5	3 204.6	3 209.5	3 197.9	3 200.6	3 213.1		8.05	-0.12%	0.04%
Western Europe [2]:	**3 238.3**	**3 261.3**	**3 266.6**	**3 255.4**	**3 258.5**	**3 271.5**		**8.04**	**-0.10%**	**0.20%**
% Country Market:	*1.7%*	*1.7%*	*1.7%*	*1.8%*	*1.8%*	*1.8%*				

FFT estimates the percent size of the foodservice market in the total market to derive a unique one-year "panorama" of retail and foodservice markets.

Europe[2] or North American[2] totals provided to help assess market potential.

MARKET DEMAND BY VALUE

	Historical Markets			Forecast Markets			Market Shares	Expenditure Per Capita	Historical Growth [3]	Forecast Growth [3]
	2005	2009	2010	2011	2012	2013	2010	2010	2005-10	2010-13
	(EUR m.)	(EUR m.)	(EUR m.)	(EUR m.)	(EUR m.)	(EUR m.)	(%)	(EUR)	(Av. Ann.)	(Av. Ann.)
Retail Market:	-	-	215.7	-	-	-	55.7%	27.96	-	-
Foodservice Market:	-	-	171.3	-	-	-	44.3%	22.20	-	-
Total Market:	**329.7**	**353.1**	**386.9**	**388.2**	**391.9**	**396.2**	**100.0%**	**50.15**	**0.10%**	**0.10%**
Other Countries:	14 119.8	14 209.9	14 477.9	14 583.8	14 775.9	15 016.8	–	36.21	0.30%	1.23%
Europe [2]:	**14 449.5**	**14 563.0**	**14 864.8**	**14 972.0**	**15 167.8**	**15 413.0**		**36.57**	**0.30%**	**1.50%**
% Country Market:	*2.3%*	*2.4%*	*2.6%*	*2.6%*	*2.6%*	*2.6%*				

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

MARKET DEMAND BY VALUE

	Historical Markets			Forecast Markets			Market Shares	Expenditure Per Capita	Historical Growth [3]	Forecast Growth [3]
	2005	2009	2010	2011	2012	2013	2010	2010	2005-10	2010-13
	(CHF m.)	(CHF m.)	(CHF m.)	(CHF m.)	(CHF m.)	(CHF m.)	(%)	(CHF)	(Av. Ann.)	(Av. Ann.)
Euro 1.00 = CHF	1.5480	1.5100	1.3800	1.3800	1.3800	1.3800				
Retail Market:	-	-	297.7	-	-	-	55.7%	38.59	-	-
Foodservice Market:	-	-	236.4	-	-	-	44.3%	30.64	-	-
Total Market:	**510.5**	**533.2**	**534.1**	**535.8**	**540.9**	**546.8**	**100.0%**	**69.23**	**0.10%**	**0.10%**
Other Countries:	21 861.7	21 457.0	19 983.8	20 130.1	20 395.3	20 727.8	–	49.98	0.30%	1.24%
Europe [2]:	**22 372.2**	**21 990.2**	**20 517.9**	**20 665.9**	**20 936.2**	**21 274.6**		**50.48**	**0.30%**	**1.50%**
% Country Market:	*2.3%*	*2.4%*	*2.6%*	*2.6%*	*2.6%*	*2.6%*				

1. All data refer to total final human consumption, including retail, catering/foodservice and artisanal thus excluding industrial consumption and auto-consumption.
2. Europe: Altogether 22 country markets are covered, including all the European Community (EC) members (excepting only the 3 Baltic states and Slovenia, Malta and Cyprus), plus non-members Norway and Switzerland. North America: Canada, Mexico and the USA.
3. Applying full exponential regression curve analysis including data for all intermediary years. Real value growth data are in constant prices.

Note: Illustrative Data Only Presented

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PERISCOPE
ICE CREAM IN SWITZERLAND

THE TOP-10 COMPANIES FROM FFT'S VAST DATABASE
(and more in annexes if available)

Country: Switzerland

Main Process Family: Dessert

Product: Ice Cream

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

More Companies provided in Annexes for some 850 country + product markets (out of 3500+ available)

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

THE TOP-10 HOLDING COMPANIES
2011 COMPANY TOTAL MARKET SHARES BY VALUE

Key Local Subsidiary Given.

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

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

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

BRANDED Vs OWN LABEL

	% Share	
Manufacturers' branded products:	69.8%	
Unbranded goods:	0.0%	
Distributors' own label products:	26.2%	(and 43.8% of retail)
Artisanal production_:	4.0%	
	100.0%	

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

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

Note: Illustrative Data Only Presented

PERISCOPE

ICE CREAM IN SWITZERLAND

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

MAJOR BRANDS
(Top-10 Suppliers)

MAJOR BRANDS
The major brands for the Top-10 companies (and more in the supplementary tables if available).

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

MAJOR BRANDS IN THE FFT DATABASE

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

"WHO OWNS WHOM"

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

Source: Food for Thought (FFT)

WARNING: Major Brands are **NOT** provided in Periscopes covering Product Groups, for example "All Dairy". Brands are provided only for the underlying Single Product Markets, e..g milk, yogurt, etc., such as Ice Cream as is the case here.

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ANNEX: STRATEGIC COMPANY LISTING

2011 COMPANY MARKET SHARES AND RANKINGS

(Updated continously)

N° of Country Markets: 1 — N° of Holding Companies: 12
N° of Product Markets: 1 — N° of Key Subsidiaries: 6
N° of Market Shares: **14** — N° of All Companies cited: **18**

Bischofsberger to ZMV

All Companies for this selection in alphabetic order

Name of subsidiary different to that of holding company

Company and Product Market No.	Name	Country Operating Companies and Market Shares (Country Product Market Rankings in brackets) Switzer-land	7-Selected Country Market Shares Product Market	All Food & Drink	Share of Co. Food & Drink Sales *
Bischofs-berger 9.1	Ice Cream	Bischofs-berger 1.0% (9)	1.0%	1.0%	100.0%
Bofrost 9.1	Ice Cream	Bofrost 0.8% (12)	0.8%	0.8%	100.0%
Coop Schweiz 9.1	Ice Cream	Coop Schweiz 8.0% (5)	7.7%	7.7%	100.0%
Gasparini 9.1	Ice Cream	Gasparini 0.8% (11)	0.8%	0.8%	100.0%
General Mills 9.1	Ice Cream	Sygama 1.5% (7)	1.5%	1.5%	100.0%
Laiteries Réunies 9.1	Ice Cream	Nutrilait 0.8% (10)	0.8%	0.8%	100.0%
Luganella 9.1	Ice Cream	Luganella 1.0% (8)	1.0%	1.0%	100.0%
Mars 9.1	Ice Cream		1.9%	1.9%	100.0%
Migros 9.1	Ice Cream	Midor 16.3% (3)	15.8%	15.8%	100.0%
And last of twelve A to Z Companies later (and in some cases of over 30 companies)					
ZMV 9.1	Ice Cream	Emmi Gerber 13% (4)		12.6%	100.0%

FULL ALPHABETIC LIST OF COMPANIES

ALL SUPPLIERS IDENTIFIED IN THE FFT DATABASE COVERING OVER 10,000 COMPANIES FOR ANY SELECTION ARE ALWAYS PROVIDED

If more then 10 holding companies are present in the selected markets, these will be listed in this supplementary annex to the Periscope.

More then 10 Holding Companies ?

Of the 3500+ Periscopes available, some:

- 850 cover over 10 holding companies;
- 200 cover over 20 holding companies;
- 50 cover over 30 holding companies.

- Key Country Subsidiaries
- Product and Country Market Shares
- Product and Country Rankings

Multi-Product and Country Reports

Not the case here, but in multi-selection reports, data provided includes:

- The Regional Co. Market Share.
- The All Country+Product Market Share for all the countries and products selected.
- The Contribution to Company Sales Turnover (percent per product).

STRATEGIC COMPANY PROFILES
Want ot know more?
Go to "**10,000 Companies**" online and download a specific company profile !

WARNING: Only the Top-10 Holding Companies are provided in Periscopes covering Product Groups, for example "All Dairy". Additional companies are provided only for the underlying Single Product Markets, e..g milk, yogurt, etc., such as Ice Cream as is the case here.

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

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

Source: Food for Thought

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100 SELECTED CLIENTS

(from over 1000 clients)

1000+ Clients !

A wide range of manufacturing and service industries have been using the FFT database since 1990.

Food & Drink

Alfred L. Wolff
Allied Mills
Arla Foods
Avebe
Barilla
Baxters Food Group
Beghin-Say
Bonduelle
British Sugar plc
Cadbury Schweppes
Campbell Soup
Cargill International
Carl Kuhne
Centrale Suiker Maatschappij (CSM)
Cuisimer
Danone
Farm Frites
Friesland Foods Int'l
General Mills
H.J. Heinz
Hero
Homina
Kerry Foods
Kraft International
Maple Leaf
Mars/Masterfoods/Effem
Materna
McCain Foods Limited
MD Foods
Migros
Nestle
Nippon Suisan Europe B.V.
Panzani
Pescanova
Premier Foods
Princes MC Foods Europe
Raisio
Rich's
Rollton
Sara Lee/D.E.
Snack Ventures Europe/Pepsico
Swiss Dairy Foods
Unilever
Walter-Rau

Consultancy

Accenture
Arthur D. Little
Bain & Company
BHG Beteil. und Holding GmbH
Boer & Croon Corporate Strategy
Booz, Allen & Hamilton
Boston Consulting Group
Coopers & Lybrand
Ernst & Young
Giract
Kantor Management Consultants
Klaus Becking Business Consulting
KPMG
L.E.K. Consulting
McKinsey & Company
Mitsubishi ResearchInstitute
Numico Research
OC&C Strategy Consultants
Price Waterhouse Coopers
Stamford Partners

Ingredients

BASF Aktiengesellschaft
Chr. Hansen
Copenhagen Pectin
Danisco
Degussa
Dow Europe GmbH
DSM/Gist Brocades
Firmenich
FMC
Givaudan Roure
Griffith Laboratories
Int. Flavours & Fragrances (IFF)
Lucta
Novozymes
Palsgaard
Pfizer
Rhodia Food
Roche
Sandoz Nutrition
Sanofi Bio Industries
Royal Cosun
Symrise GmbH

Banking, Investment and M&A Advisory

ABN AMRO
Bank of America
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Cazenove Partners
Credit Suisse First Boston
Deutsche Bank
Estin & Co.
Glitnir
Goldman Sachs
HSBC Bank
J.P. Morgan
Lazard Freres
Lehman Brothers
Merrill Lynch
Morgan Stanley
NIBC Bank N.V.
PAI management
Rabobank International
Rothschild & Cie
Schroder Securities
Spektor, Sachs & Company
UBS Warburg

Packaging & Equipment

Air Liquide
Air Products
Alcan
Berndt & Partner
Clextral
Crown Holdings Inc
Dole Packaged Foods Europe
Flexpakko
Impress Group
Intralox
Maschinenbau Gmbh
Mead Verpakking
Mizkan Group Corporation
PKL Verpackungssysteme
Rintekno Oy
Scholle Corporation
Sealed Air
Siemens
SIG Combibloc
Sollac Aciers pour l'Emballage
Tetrapak
Veriplast

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Don't hesitate to call, we are here to help !

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