

The Frozen Foods Market In Western Europe

TABLE OF CONTENTS

1.	<u>INTRODUCTION</u>	1
1.1	FOREWORD	1
1.2	EXPANDED COVERAGE	2
1.3	FEATURES AND INNOVATIONS IN THIS EDITION	3
1.4	DEFINITIONS AND METHODOLOGY	4
2.	<u>EXECUTIVE SUMMARY</u>	7
2.1	INTRODUCTION	7
	Figure 2-1: 2010 Frozen Foods Markets Vs Total Market	7
2.2	OVERVIEW	9
2.21	The Total Market by Country	9
	Figure 2-2: Total 2010 Market by Country	9
	Table 2-1: 2005 & 2010 Total Markets	9
2.22	The Total Market by Product	12
	Figure 2-3: Total 2010 Market by Product	12
	Table 2-2: 2005 & 2010 Product Markets	13
2.23	Identifying Leading Country/Product Markets	14
	Figure 2-4: Total 2010 Market by Product	14
	Figure 2-5: 2005 & 2010 Product Markets	15
2.3	THE RETAIL AND CATERING/FOODSERVICE MARKETS	16
2.31	Retail and Catering Market Overview	16
	Table 2-3: 2005 & 2010 Retail and Catering Product Markets	16
2.32	Retail and Catering Analysis by Country	16
2.321	Retail Market Shares by Country	17
	Figure 2-6: 2010 Country Retail Market Shares: All Selected Products	17
2.322	Catering Market Shares by Country	18
	Figure 2-7: 2010 Country Catering Market Shares: All Selected Products	18
2.323	Catering Vs Retail Markets by Country	19
	Figure 2-8: 2010 Catering Vs Retail Country Markets By Country	19
2.33	Retail Vs Catering Analysis by Product	20
2.331	Retail Market Shares by Product	20
	Figure 2-9: 2010 Retail Market Shares by Country	20
2.332	Catering Market Shares by Product	20
	Figure 2-10: 2010 Catering Market Shares by Product	21
2.333	Catering Vs Retail Markets by Product	22
	Figure 2-11: 2010 Retail Vs Catering Markets By Country	22

2.4	HISTORIC GROWTH TRENDS	23
2.41	Summary of Historic Trends	23
	Table 2-4: 2005-2010 Growth Trend Rankings by Country	24
	Table 2-5: 2005-2010 Growth Trend Rankings by Product	25
2.42	Country Market Analysis	26
2.421	Total Product Markets by Country	26
	Figure 2-12: Total 2005 & 2010 Markets By Country	26
2.422	Expenditure Per Capita by Country	27
	Figure 2-13: 2005 & 2010 Per Capita Expenditure By Country	27
	Figure 2-14: 2005 & 2010 % Change in Per Capita Consumption	27
2.423	Market Growth by Country in Current Values	28
	Figure 2-15: 2005 & 2010 Market Growth In Euro Millions By Country	28
2.424	Real Percent Market Growth by Country	29
	Figure 2-16: 2005 & 2010 Real Av. Annual % Market Growth by Country	29
2.425	Current Value & Real % Growth Rates Compared by Country	30
	Figure 2-17: 2005 & 2010 Absolute and Percent Growth Rates by Country	30
2.43	Product Market Analysis	30
2.431	Total Markets by Product	31
	Figure 2-18: Total 2005 & 2010 Markets By Product	31
2.432	Expenditure Per Capita by Product	32
	Figure 2-19: 2005 & 2010 Per Capita Expenditure By Product	32
	Figure 2-20: 2005 & 2010 % Change in Per Capita Consumption	32
2.433	Total Market Growth by Product in Current Values	33
	Figure 2-21: 2005 & 2010 Market Growth In Euro Millions By Product	33
2.434	Real Percent Market Growth by Product	34
	Figure 2-22: 2005 & 2010 Real Av. Annual % Market Growth by Product	34
2.435	Current Value & Real % Growth Rates Compared by Product	34
	Figure 2-23: 2005 & 2010 Absolute and Percent Growth Rates by Product	35
2.5	FORECAST GROWTH TRENDS	36
2.51	Forecast 2010 & 2013 Value Market Growth by Product	36
	Figure 2-24: Forecast 2010 & 2013 Market Growth by Product	36
2.52	Forecast 2010 & 2013 Real Percent Market Growth by Product	37
	Figure 2-25: Forecast 2010 & 2013 Real % Market Growth by Product	37
2.53	Forecast 2010 & 2013 Growth Rates Compared by Product	38
	Figure 2-26: Forecast Euro Million & Real % Market Growth by Product	38
	Table 2-6: 2010 & 2013 Forecast Growth Rates by Product	41

2.6	STRATEGIC COMPANY POSITIONS IN 2011	41
2.61	Introduction	41
	Figure 2-27: Strategic Market Presence of Top-10 Companies	41
2.62	The Top Players in Western Europe	41
2.621	Market Dominance	41
2.622	Market Presence	41
2.63	Strategic Market Overview	41
	Table 2-7: Western Europe Top-10 Company Market Shares by Country	42
2.64	Assessing the Major Forces in the Market	45
	Figure 2-27: Dominance of the Top-30 Companies	44
	Figure 2-28: Branded Vs Own Label	44
	Figure 2-29: Presence of Top-10 Companies by Country	44
	Figure 2-30: Dominance of Top-10 Companies Present in Each Country	44
2.65	Dominance of the Top 10 Companies in Western Europe	45
	Table 2-8: The Top-100 Companies by Market Share in Western Europe	46
2.7	MAJOR BRANDS AND MARKET REFERENCE SYSTEM	47
2.8	CONCLUSION	47
2.9	SPECIAL ANNEX: QUICK REFERENCE TABLES	47
	Table 2- 9: 2005 Country & Product Markets by Value	48
	Table 2-10: 2010 Country & Product Markets by Value	49
	Table 2-11: 2010 Retail Country & Product Markets	50
	Table 2-12: 2010 Foodservice Country & Product Markets	51
	Table 2-13: 2005 & 2010 Country/Product Growth in Current Euro Millions	52
	Table 2-14: 2005 & 2010 Country/Product Real Av. Ann. % Growth Rates	53
	Table 2-15: 2005 Country & Product Markets by Volume	54
	Table 2-16: 2010 Country & Product Markets by Volume	55
	Table 2-17: 2005 & 2010 Retail Market Share of Each Country and Product Market	56
	Table 2-18: 2010 Catering Market Share of Each Country and Product Market	57
	Table 2-19: 2010 Retail Market Shares	58
	Table 2-20: 2010 Catering Market Shares	59
	Table 2-21: 2010 Retail Expenditure Per Capita	60
	Table 2-22: 2010 Catering Expenditure Per Capita	61

3.	<u>DEMAND AND SUPPLY PRODUCT MARKET DATA</u>	62
	<i>(See Detailed, Commented Samples)</i>	
3.1	FROZEN PASTRY PRODUCTS	63
3.11	Total Demand by Volume, 2005, 2009 and 2010, and Forecast 2011, 2012 and	63
3.12	Total Demand by Value, 2005, 2009 and 2010, and Forecast 2011, 2012 and 2	64
3.13	Retail & Foodservice Demand by Volume, 2005, 2009 and 2010	65
3.14	Retail & Foodservice Demand by Value (Euros or US\$), 2005, 2009 and 2010	66
3.15	Company Market Shares by Value, 2011 (updated to preceding month)	67
3.16	Branded, Unbranded, Own Label and Artisanal Distribution Channels, 2011	67
3.2	FROZEN FRUIT	69
3.21	Total Demand by Volume, 2005, 2009 and 2010, and Forecast 2011, 2012 and	69
3.22	Total Demand by Value, 2005, 2009 and 2010, and Forecast 2011, 2012 and 2	70
3.23	Retail & Foodservice Demand by Volume, 2005, 2009 and 2010	71
3.24	Retail & Foodservice Demand by Value (Euros or US\$), 2005, 2009 and 2010	72
3.25	Company Market Shares by Value, 2011 (updated to preceding month)	73
3.26	Branded, Unbranded, Own Label and Artisanal Distribution Channels, 2011	73
3.3	FROZEN VEGETABLES	75
3.31	Total Demand by Volume, 2005, 2009 and 2010, and Forecast 2011, 2012 and	75
3.32	Total Demand by Value, 2005, 2009 and 2010, and Forecast 2011, 2012 and 2	76
3.33	Retail & Foodservice Demand by Volume, 2005, 2009 and 2010	77
3.34	Retail & Foodservice Demand by Value (Euros or US\$), 2005, 2009 and 2010	78
3.35	Company Market Shares by Value, 2011 (updated to preceding month)	79
3.36	Branded, Unbranded, Own Label and Artisanal Distribution Channels, 2011	79
3.4	FROZEN POTATO	81
3.41	Total Demand by Volume, 2005, 2009 and 2010, and Forecast 2011, 2012 and	81
3.42	Total Demand by Value, 2005, 2009 and 2010, and Forecast 2011, 2012 and 2	82
3.43	Retail & Foodservice Demand by Volume, 2005, 2009 and 2010	83
3.44	Retail & Foodservice Demand by Value (Euros or US\$), 2005, 2009 and 2010	84
3.45	Company Market Shares by Value, 2011 (updated to preceding month)	85
3.46	Branded, Unbranded, Own Label and Artisanal Distribution Channels, 2011	85
3.5	ICE CREAM	87
3.51	Total Demand by Volume, 2005, 2009 and 2010, and Forecast 2011, 2012 and	87
3.52	Total Demand by Value, 2005, 2009 and 2010, and Forecast 2011, 2012 and 2	88
3.53	Retail & Foodservice Demand by Volume, 2005, 2009 and 2010	89
3.54	Retail & Foodservice Demand by Value (Euros or US\$), 2005, 2009 and 2010	90
3.55	Company Market Shares by Value, 2011 (updated to preceding month)	91
3.56	Branded, Unbranded, Own Label and Artisanal Distribution Channels, 2011	91

3.6	FROZEN SOUP	93
3.61	Total Demand by Volume, 2005, 2009 and 2010, and Forecast 2011, 2012 and	93
3.62	Total Demand by Value, 2005, 2009 and 2010, and Forecast 2011, 2012 and 2	94
3.63	Retail & Foodservice Demand by Volume, 2005, 2009 and 2010	95
3.64	Retail & Foodservice Demand by Value (Euros or US\$), 2005, 2009 and 2010	96
3.65	Company Market Shares by Value, 2011 (updated to preceding month)	97
3.66	Branded, Unbranded, Own Label and Artisanal Distribution Channels, 2011	97
3.7	FROZEN CONVENIENCE MEAT	99
3.71	Total Demand by Volume, 2005, 2009 and 2010, and Forecast 2011, 2012 and	99
3.72	Total Demand by Value, 2005, 2009 and 2010, and Forecast 2011, 2012 and 2	100
3.73	Retail & Foodservice Demand by Volume, 2005, 2009 and 2010	101
3.74	Retail & Foodservice Demand by Value (Euros or US\$), 2005, 2009 and 2010	102
3.75	Company Market Shares by Value, 2011 (updated to preceding month)	103
3.76	Branded, Unbranded, Own Label and Artisanal Distribution Channels, 2011	103
3.8	FROZEN FISH	105
3.81	Total Demand by Volume, 2005, 2009 and 2010, and Forecast 2011, 2012 and	105
3.82	Total Demand by Value, 2005, 2009 and 2010, and Forecast 2011, 2012 and 2	106
3.83	Retail & Foodservice Demand by Volume, 2005, 2009 and 2010	107
3.84	Retail & Foodservice Demand by Value (Euros or US\$), 2005, 2009 and 2010	108
3.85	Company Market Shares by Value, 2011 (updated to preceding month)	109
3.86	Branded, Unbranded, Own Label and Artisanal Distribution Channels, 2011	109
3.9	FROZEN PIZZA	111
3.91	Total Demand by Volume, 2005, 2009 and 2010, and Forecast 2011, 2012 and	111
3.92	Total Demand by Value, 2005, 2009 and 2010, and Forecast 2011, 2012 and 2	112
3.93	Retail & Foodservice Demand by Volume, 2005, 2009 and 2010	113
3.94	Retail & Foodservice Demand by Value (Euros or US\$), 2005, 2009 and 2010	114
3.95	Company Market Shares by Value, 2011 (updated to preceding month)	115
3.96	Branded, Unbranded, Own Label and Artisanal Distribution Channels, 2011	115
3.10	FROZEN READY MEALS	117
3.101	Total Demand by Volume, 2005, 2009 and 2010, and Forecast 2011, 2012 and	117
3.102	Total Demand by Value, 2005, 2009 and 2010, and Forecast 2011, 2012 and 2	118
3.103	Retail & Foodservice Demand by Volume, 2005, 2009 and 2010	119
3.104	Retail & Foodservice Demand by Value (Euros or US\$), 2005, 2009 and 2010	120
3.105	Company Market Shares by Value, 2011 (updated to preceding month)	121
3.106	Branded, Unbranded, Own Label and Artisanal Distribution Channels, 2011	121

STRATEGIC COMPANY PROFILES

(See Company List and Detailed, Commented Samples)

Western Europe

Number of Companies cited: 1196

Number of Company Market Shares cited: 1759

- General:** This section provides an alphabetic listing of the 1196 holding, independant and subsidiary companies covered by this report.
- Key Definition:** Company Market Shares by value given for the Total Market (retail, foodservice and artisanal), and not for a potentially misleading segment of the market only.
- Up-to-date:** FFT's underlying International Food & Drink Markets database is updated continuously to preceding month, in particular including significant on-going Mergers & Acquisitions (M&A's).

2011 Company Data Provided

(updated to about one month preceding publication)

Company Market Shares by Product (see product market sections above)

- Up to Top-10 Holding Companies by Country, Region and Product
- Key Local Subsidiaries by country and product for each Holding Company.
- 2011 Company Market Shares by Value by Region, Country and Product

Full Alphabetic Company Listing

124 - 352

- All 1196 Companies Identified in this report (see company list).
- Key Country Subsidiaries by Country and Product for each Holding Company
- 2011 Company Market Shares and Rankings by Country & Product
- Estimated contribution by product to each company's regional sales turnover (percent shares at retail and foodservice buy-in prices)

Major Brands And Company "Who Owns Whom" (see Major Brands section below)

- Key Subsidiaries and Brands by Holding Company
- "Who Owns Whom" listing identifying holding companies and subsidiaries.

Significant Mergers & Acquisitions (M&A's) - see listing online at www.fft.com

5.	<u>MAJOR BRANDS and COMPANY "WHO OWNS WHOM"</u>	354
	<i>(estimated number of pages)</i>	
	• Companies and Brands by Product & Country	387
	• Companies and Brands by Holding and Key Subsidiary Company	420
	• "Who Owns Whom" listing identifying holding companies and subsidiaries.	420 - 453

6. **ANNEXES**

The following annexes are available online

(see "Supporting Data" online on navigation bar at www.fft.com).

- 1. 11-Language Product Lexicon**
- 2. Product Definitions**
- 3. Company Abbreviations**
- 4. Cat and Dog Populations**
- 5. Human Populations**
- 6. Euro Exchange Rates**
- 7. US\$ Exchange Rates**

Following Pages:

- **About FFT**
- **About FFT's Food & Drink Strategic Information Services**
- **Product and Country Coverage of the full database**
- **Key Definitions and Methodology**