



## CLASSIC MARKET DEMAND REPORT

All reports present the following sample tables for each country and product.

>> All tables are also available individually online for any combination of countries and products.

# Food & Drink Strategic Information Services Ice Cream Markets

## PRINTED REPORTS

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

*Try printing this brochure !*

## **SAMPLE REPORT**

***Note: Illustrative Data Only Presented***

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## FOREWORD

### PRINTING YOUR REPORT

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

**PRINT YOUR REPORTS**

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Common definitions are applied to all country & product markets.

### OVERALL DEFINITIONS

- General:** Market data refer to all products sold for **final human consumption** in retail, foodservice and artisanal markets (own-produced for own sale, e.g. independent bakers), thus excluding industrial and intermediate consumption, and auto-consumption.
- Product:** All product markets are carefully defined so as to be comparable across all countries. Special cases in a few country and product markets are specified.
- Prices:** Retail prices (including VAT, excise and other indirect taxes) and foodservice buy-in prices are applied throughout.

Retail and foodservice buy-in prices are applied throughout.

### METHODOLOGY

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

There are NO data gaps !

### FULL COVERAGE

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

### DATA COLLECTION PRINCIPLES

- 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.

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

## ILLUSTRATED SAMPLES

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#### **FREE ONLINE ACCESS - PDF AND EXCEL**

All the 584 product tables can be accessed individually online. Tables can also be produced for any combination of the 146 products and 22 countries, e.g. Ready Meal markets in Scandinavia, including calculations of the Total, Retail and Foodservice Markets, overall Consumption and Expenditure Per Capita, overall Growth Rates, etc.

**VOLUME 1: TOTAL MARKET**

**9.1 ICE CREAM**

**PRODUCT GROUP:** ICE CREAM AND DESSERTS

**Main Process Family:**

Frozen

**Product:** Ice cream

**Principal Meal Function:**

Dessert

**Regional Forecasts:\*** World 1.1%; Central Europe: 5.5%; Western Europe: 1.0% (av. annual real values 2007-2012)

**Dry Weight Conversion Factor:##**

0.75

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

**Full Product Definitions Provided,**  
comparable across all countries.

**114 Single Product Markets**  
and  
**32 Product Groups available**

**Regional Forecasts for Western Europe and for Central Europe**

**MARKET SIZE: VOLUME**

Countries **	Total Markets					Consumption Per Capita				Rankings		
	2002	2006	2007	2007	2002-2007 Av.		2002	2007	2002-07	2007	2007	5-year
	Total	Total	Total	Shares	Annual Growth		(litres)	(litres)	Growth	Total	Per	Real %
Any choice from 22 countries possible	(million litres)	(million litres)	(million litres)	(per-cent)	(per-cent) ##	(litres)	(litres)	(average annual)***	Mkt Size	Capita Cons.	Market Growth	
Austria	55.1	56.3	56.8	1.6%						16	19	
Belgium/Lux	80.6	84.0	87.0	2.4%						12	14	
Bulgaria	8.5	13.0	13.6	0.4%						22	2	
Czech Republic	52.0	69.0	70.5	1.9%						15	5	
Denmark	48.6	49.0	49.0	1.3%						6	21	
Finland	70.3	69.2	74.3	2.0%						2	18	
France	334.2	382.7	361.1	9.9%	0.9%	5.37	5.58	5.71	-0.3%	4	17	13
Germany	642.0	692.5	683.8	18.7%	1.0%	8.37	7.79	8.29	1.0%	1	8	12
Greece	91.9	94.6	96.0	2.6%	0.8%	0.83	8.37	8.59	0.3%	9	7	16
Hungary	33.8	39.6	41.1	1.1%						19	18	7
Ireland	41.4	45.5	47.1	1.3%						18	4	10
Italy	565.0	591.5	599.5	16.4%						2	5	15
Netherlands	132.0	137.8	131.3	3.6%						7	10	20
Norway	55.0	65.4	67.1	1.8%						14	1	6
Poland	90.7	135.0	140.0	3.8%	10.2%	9.86	2.35	3.67	10.5%	6	20	3
Portugal	63.2	73.9	76.6	2.1%	4.0%	2.67	6.29	7.20	2.6%	11	14	8
Romania	20.6	38.8	40.0	1.1%	14.9%	3.88	0.92	1.86	16.0%	20	21	1
Slovakia	16.0	20.5	21.4	0.6%	5.4%	1.08	2.96	3.97	5.5%	21	19	4
Spain	285.0	342.0	351.7	9.6%	4.0%	13.34	6.95	7.98	2.2%	5	11	9
Sweden	117.1	101.4	100.5	2.7%	-2.9%							22
Switzerland	54.0	55.4	56.0	1.5%	0.5%							17
United Kingdom	460.7	482.8	500.0	13.6%	1.8%							11
<b>Total</b>	<b>3 317.6</b>	<b>3 639.7</b>	<b>3 664.5</b>	<b>100.0%</b>	<b>1.8%</b>	<b>69.38</b>	<b>6.84</b>	<b>7.39</b>	<b>1.3%</b>			

**COMPLETE AND COMPARABLE, RELIABLE AND UP-TO-DATE DATA, for ALL Country & Product Markets. ( There are no gaps! )**

**MARKET POTENTIAL**  
Per Capita Consumption and 5-Year Trends

**FAST MARKET ASSESSMENT**  
Country Rankings Point to Market Strengths and Weaknesses (Relative Size/Strength/Growth)

\* Excludes the "quality" factor, i.e. assumes product continuity. W. Europe covers 16 countries, C. Europe 6 countries, and World 25 countries with N. America (3 countries).

\*\* 22 countries include all European Community (EC) countries except 3 Baltic States, Slovenia, Malta and Cyprus, plus Norway and Switzerland.

# All data refer to total final human consumption, including retail, catering/foodservice and artisanal (own-produced for own sale, e.g. independent bakers), thus excluding industrial consumption and auto-consumption.

## Applying full 6-Year regression analysis.

### Single Product volume data is rounded up/down in Product Group tables (including several products) by the Ready-to-Eat/Drink Dry Weight Conversion Factor.

Source: Food for Thought

**Note: Illustrative Data Only Presented**

**VOLUME 1: TOTAL MARKET**

**PRODUCT GROUP:** ICE CREAM AND DESSERTS

**Product:** Ice cream

**Regional Forecasts:\*** World 1.1%; Central Europe: 5.5%; Western Europe: 1.0% (av. annual real values 2007-2012)

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

**114 Single Product Markets and 32 Product Groups available**

**9.1 ICE CREAM**

Frozen Dessert

**Full Product Definitions provided, comparable across all countries.**

**Regional Forecasts for Western Europe and for Central Europe**

**MARKET SIZE: VALUE**

Countries **	Total Markets								Exp. Per Capita (2007 Euros)	Rankings		
	2002	2006	2007	2007	2007	2002-2007 Av.		2007 Total Mkt Size		2007 Per Capita Exp.	5-year Real % Market Growth	
	(Current Euro millions)	(Current Euro millions)	(Current Euro millions)	(Equivalent Local Currency millions)	Shares (per-cent)	(Real per-cent) ##	(Current Euro m.) **					
Austria	188.0	206.4	221.9	EUR 221.9	1.3%	0.4%	6.8	26.77	18	16	17	
Belgium/Lux	312.1	352.0	365.5	EUR 365.5	2.2%	3.1%	19.5	34.37	10	12	12	
Bulgaria	22.2	51.0	50.8	BGN 50.8	0.9%	15.9%	20.7	6.90	22	21	2	
Czech Republic	179.5	283.0	283.0	CZK 283.0	0.7%	5.4%	13.7	23.28	12	14	5	
Denmark	181.2	183.0	183.0	DKK 183.0	0.7%	5.4%	13.7	23.28	19	9	20	
Finland	215.4	218.0	218.0	EUR 218.0	1.3%	0.4%	6.8	26.77	16	5	16	
France	1 556.0	1 706.0	1 592.9	EUR 1 592.9	9.4%	-2.1%	7.4	25.18	5	17	21	
Germany	2 855.3	3 320.0	3 430.5	EUR 3 430.5	20.3%	0.9%	115.1	41.59	1	8	11	
Greece	344.8	403.7	423.1	EUR 423.1	2.5%	0.8%	15.7	37.85	9	10	13	
Hungary	164.5	225.2	250.8	HUF 64 698.3	1.5%	4.2%	17.3	24.91	14	18	7	
Ireland	169.6	191.0	225.0	EUR 225.0	1.3%	0.4%	6.8	26.77	17	1	10	
Italy	2 496.2	2 861.7	3 009.9	EUR 3 009.9	17.8%	0.4%	6.8	26.77	2	3	14	
Netherlands	536.7	597.0	586.0	EUR 586.0	3.5%	0.4%	6.8	26.77	6	11	18	
Norway	191.4	217.0	238.9	NOK 1 923.3	1.4%	0.4%	6.8	26.77	15	2	6	
Poland	240.6	381.5	427.9	PLZ 1 638.9	2.5%	0.4%	6.8	26.77	8	20	3	
Portugal	268.2	320.4	365.5	EUR 365.5	2.2%	3.1%	19.5	34.37	11	13	9	
Romania	45.2	124.6	148.5	ROL 504.8	0.9%	15.9%	20.7	6.90	20	22	1	
Slovakia	56.7	109.5	125.2	SKK 4 258.4	0.7%	5.4%	13.7	23.28	21	19	4	
Spain	1 274.3	1 742.7	1 907.4	EUR 1 907.4	11.3%	4.0%	126.6	43.25	4	6	8	
Sweden	476.6	403.5	365.5	SEK 365.5	2.6%	-2.9%	126.6	43.25	11	13	9	
Switzerland	332.5	319.1	319.1	CHF 319.1	1.9%	0.6%	126.6	43.25	4	6	8	
United Kingdom	2 041.9	1 966.6	1 966.6	GBP 1 966.6	11.8%	0.1%	126.6	43.25	4	6	8	
<b>Total</b>	<b>14 149.0</b>	<b>16 185.2</b>	<b>16 935.7</b>		<b>100.0%</b>	<b>0.4%</b>	<b>557.3</b>	<b>34.14</b>				

\* Excludes the "quality" factor, i.e. assumes product continuity. W. Europe covers 16 countries, C. Europe 6 countries, and World 25 countries with N. America (3 countries).

\*\* 22 countries include all European Community (EC) countries except 3 Baltic States, Slovenia, Malta and Cyprus, plus Norway and Switzerland.

# All data refer to total final human consumption, including retail, catering/foodservice and artisanal (own-produced for own sale, e.g. independent bakers), thus excluding industrial consumption and auto-consumption.

\*\* Applying current euros & exchange rates.

## Applying full 6-Year exponential regression curve analysis, and country/product food price deflators to value data in local currencies. In Euro area, 2002-2005 values converted back to local currencies at 2001 exchange rate to avoid exchange rate effects. Totals are weighted averages.

Source: Food for Thought

**Note: Illustrative Data Only Presented**

**VOLUME 2: FOODSERVICE & RETAIL MARKETS**

**114 Single Product Markets and 32 Product Groups available** → **ICE CREAM**

**PRODUCT GROUP: ICE CREAM AND DESSERTS**

**Main Process Family:** Frozen

**Product:** Ice cream

**Principal Meal Function:** Dessert

**Total Catering Share:** 42.9% (by volume)

**Dry Weight Conversion Factor:##** 0.75

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

**Online PDF and Excel access provided for any combination of products and countries**

**MARKET SIZE BY VOLUME**

**Full Product Definitions**  
Provided, comparable across all countries.

Countries *	Total 2007 Markets			National Market	Total Market			Consumption Per Capita		Foodservice Rankings		
	Foodserv. Market	Retail Market	Total Market	Foodserv. Share	Foodserv. Share	Retail Share	Foodserv. (litres)	Retail (litres)	Total Mkt Size	Nat'l Mkt Share	Per Capita Cons.	
	(million litres)	(million litres)	(million litres)	(%)	(%)	(%)						
Austria	16.3	40.6	56.8	28.6%	1.0%	1.9%	1.96	4.89	17	17	15	
Belgium/Lux	29.9	57.1					2.72	5.19	11	13	13	
Bulgaria	2.5	11.1					0.33	1.45	21	20	20	
Czech Republic	1.2	69.3					0.11	6.77	22	22	22	
Denmark	27.0	22.1					4.95	4.05	13	5	5	
Finland	29.7	44.6					5.64	8.46	12	11	1	
France	111.9	249.1	361.1	31.0%	7.1%	11.9%	1.77	3.94	5	16	17	
Germany	241.7	442.2	683.8	35.3%	15.4%	21.1%	2.93	5.36	3	12	12	
Greece	49.4	46.6	96.0	51.5%	3.1%	2.2%	4.42	4.17	8	6	9	
Hungary	8.6	32.6	41.1	20.8%	0.5%	1.6%	0.85	3.24	19	19	19	
Ireland	22.6	24.5	47.1	47.9%	1.4%	1.2%	5.29	5.74	15	7	2	
Italy	282.7	316.9	599.5	47.2%	18.0%	15.2%	4.80	5.38	1	8	6	
Netherlands	59.0	72.3	131.3	45.0%	3.8%	3.5%	3.60	4.40	6	10	11	
Norway	21.0	46.0	67.1	31.4%	1.3%	2.2%	4.51	9.87	16	15	8	
Poland	47.0	93.0	140.0	33.6%	3.0%	4.4%	1.23	2.44	9	14	18	
Portugal	52.8	23.7	76.6	69.0%	3.4%	1.1%	4.97	2.23	7	1	4	
Romania	5.3	21.6	26.9	11.2%	0.4%	1.6%	0.26	1.60	20	21	21	
Slovakia												
Spain					0.6%							
Sweden					14.0%							
Switzerland					1.5%							
United Kingdom					2.0%							
					17.8%							
<b>Total</b>	<b>1 573.3</b>	<b>2 091.1</b>	<b>3 664.5</b>	<b>42.9%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>3.17</b>	<b>4.22</b>				

**A UNIQUE COMPLETE PANORAMA OF RETAIL & FOODSERVICE MARKETS BY VOLUME**

**Strategic Overview**  
An instant assessment of the importance of foodservice markets - in some countries negligible, in others over half the market.

**IMPORTANCE OF THE FOODSERVICE MARKET**  
Country Rankings Point to Foodservice Market Strengths and Weaknesses  
(Relative Size/Share/Per Capita Consumption)

\* 22 countries include all European Community (EC) countries except 3 Baltic States, Slovenia, Malta and Cyprus, plus Norway and Switzerland.

# All data refer to total final human consumption, including retail, catering/foodservice and artisanal (own-produced for own sale, e.g. independent bakers), thus excluding industrial consumption and auto-consumption.

## Single Product volume data is rounded up/down in Product Group tables (including several products) by the Ready-to-Eat/Drink Dry Weight Conversion Factor.

Source: Food for Thought

**Note: Illustrative Data Only Presented**

**VOLUME 2: FOODSERVICE & RETAIL MARKETS**

**114 Single Product Markets and 32 Product Groups available**

**ICE CREAM**

**PRODUCT GROUP: ICE CREAM AND DESSERTS**

**Main Process Family:**

Frozen

**Product:** Ice cream

**Principal Meal Function:**

Dessert

**Total Catering Share:** 36.9% (by value)

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

**Online PDF and Excel access provided for any combination of products and countries**

**MARKET SIZE BY VALUE**

**Full Product Definitions**  
Provided, comparable across all countries.

Countries *	Total 2007 Markets						Food-service Share in Nat'l Mkt (%)	Expenditure Per Capita		Foodservice Rankings		
	Local Currency Code	Foodserv. Market (Local millions)	Retail Market (Local millions)	Foodserv. Market (Euro millions)	Retail Market (Euro millions)	Total Market (Euro millions)		Foodserv. (Euros)	Retail (Euros)	Total Mkt Size	Nat'l Mkt Share	Per Capita Exp.
Austria	EUR	54.0	167.9	54.0	167.9	221.9	24.3%	6.52	20.26	17	17	17
Belgium/Lux	EUR	118.3						10.76	24.00	11	12	13
Bulgaria	BGL	19.1						1.28	6.20	21	20	20
Czech Republic	CZK	125.6						0.47	33.00	22	22	22
Denmark	DKK	721.5						17.80	20.28	12	5	6
Finland	EUR	80.7						15.30	29.69	15	11	9
France	EUR	419.7	1 173.2	419.7	1 173.2	1 592.9	26.4%	6.63	18.54	5	15	16
Germany	EUR	1 030.4	2 400.0	1 030.4	2 400.0	3 430.5	30.0%	12.49	29.10	2	13	12
Greece	EUR	185.2	237.9	185.2	237.9	423.1	43.8%	16.57	21.28	8	6	7
Hungary	HUF	11 442.0	53 256.4	44.3	206.4	250.8	17.7%	4.41	20.50	19	19	18
Ireland	EUR	91.7	133.3	91.7	133.3	225.0	40.8%	21.48	31.22	13	7	2
Italy	EUR	1 216.7	1 793.2	1 216.7	1 793.2				30.47	1	8	3
Netherlands	EUR	224.0	362.0	224.0	362.0				22.06	6	10	10
Norway	NOK	486.4	1 437.0	60.4	178.5				38.27	16	16	11
Poland	PLZ	468.1	1 170.8	122.2	305.7	427.9	26.0%	5.21	8.02	10	14	19
Portugal	EUR	214.4	151.1	214.4	151.1	365.5	58.7%	20.16	14.21	7	1	5
Romania	ROL	61.0	443.9	17.9	130.5	148.5	12.1%	0.83	6.07	20	21	21
Slovakia	SKK	1 600.0	1 600.0	1 600.0	1 600.0	125.2	39.2%	9.10	14.14	18	9	15
Spain	EUR	1 000.0										
Sweden	SEK	8 000.0										
Switzerland	CHF	249.8	283.5	151.4	171.8							
United Kingdom	GBP	659.9	726.4	948.1	1 043.7							
<b>Total</b>				<b>6 241.6</b>	<b>10 694.1</b>	<b>16 935.7</b>	<b>36.9%</b>	<b>12.58</b>	<b>21.56</b>			

\* 22 countries include all European Community (EC) countries except 3 Baltic States, Slovenia, Malta and Cyprus, plus Norway and Switzerland.

# All data refer to total final human consumption, including retail, catering/foodservice and artisanal (own-produced for own sale, e.g. independent bakers), thus excluding industrial consumption and auto-consumption.

**Note: Illustrative Data Only Presented**

Source: Food for Thought

## 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  
Gract  
Kantor Management Consultants  
Klaus Becking Business Consulting  
KPMG  
L.E.K. Consulting  
McKinsey & Company  
Mitsubishi Research Institute  
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

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BNP Paribas  
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Goldman Sachs  
HSBC Bank  
J.P. Morgan  
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Lehman Brothers  
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NIBC Bank N.V.  
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Rabobank International  
Rothschild & Cie  
Schroder Securities  
Spektor, Sachs & Company  
UBS Warburg

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Air Products  
Alcan  
Berndt & Partner  
Clextral  
Crown Holdings Inc  
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Impress Group  
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Maschinenbau GmbH  
Mead Verpakking  
Mizkan Group Corporation  
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