



FOOD FOR THOUGHT



Your Real-Time Food and Drink Market Data Provider

Since 1990



FFT is a Swiss, independent, international food and drink consultancy based in Geneva, Switzerland, in the heart of Europe. First launched in 1989, it has grown from small beginnings to cover 25 countries in North America, Western Europe and Central Europe today.

FFT began its International Food & Drink Markets database in 1990, and has continuously developed it ever since. Its basic aim has always been to provide a complete strategic picture of the entire market (no gaps! - 100% of food & drink consumption covered), with all data comparable across all markets.

Overview of coverage

25 Countries

Austria	Italy
Belgium/ Luxembourg	Mexico
Bulgaria	Netherlands
Canada	Norway
Czech Republic	Poland
Denmark	Portugal
Finland	Romania
France	Slovakia
Germany	Spain
Greece	Sweden
Hungary	Switzerland
Ireland / Eire	United Kingdom
	USA

**The FFT Database
Since 1990**

**Any combination
in Real-Time**

@
www.fft.com

Supply

Demand

**10,000
Company Profiles**

Abbas Bayat
Agrolimen
Allied Domecq
Altria
Anheuser Busch
Unilever
Uniq
Valio
Vandemoortele
Wessanen
Wrigley
Zuegg

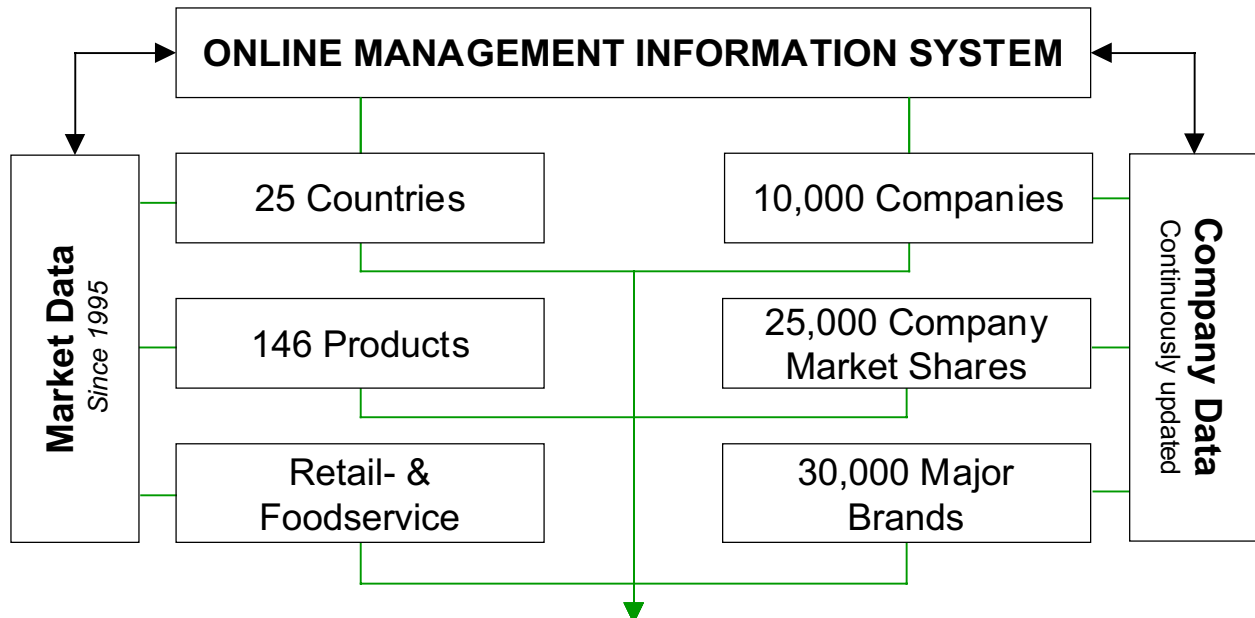
← and 10,000
companies
later

146 Products

Baby Foods	Desserts (Including Ice Cream)	Fruits	Potato And Potato Products
Bakery Products	Dressings And Condiments	Ingredients	Preserves (Jams & Spreads)
Canned Products	Drinks - Alcoholic	Meat, Fresh And Processed	Ready Meals
Cheese	Drinks - Hot Beverages	Meat, Fresh	Sauces
Chilled Products	Drinks - Soft Drinks & Juices	Meat, Processed	Snacks, Savoury
Confectionery	Fresh And Processed Fish	Oils And Fats (Edible)	Snacks, Sweet
Dairy Products	Fresh Products	Pasta & Pasta Sauces	Soups
Dehydrated Products	Frozen Foods	Petfoods	Vegetables



HOW IT WORKS



ANY DATA COMBINATION POSSIBLE to support:

- Company Strengths & Weaknesses Analysis
- Market Opportunities & Threats Evaluations
- Merger & Acquisition Analysis
- Management Control
- Marketing & Sales
- Strategic Planning

YOUR INDIVIDUALLY CUSTOMIZED REPORT IS DELIVERED IMMEDIATELY

Automatically contains:

- Detailed table of contents
- Your own selection of
 - Product(s), country(ies) and market data, or
 - Company, country(ies) and company data
- Detailed information per country or company selected, plus a regional overview
- PDF Printable and Excel versions



WHAT YOU GET

5,000+ Product Market Reports

All demand & supply data

and

10,000 Strategic Company Profiles

Company Market Shares, Rankings and
Major Brands by Product and Country

CUSTOMIZED

Powerful, proprietary software enables clients to create - through their own selection from 25 countries, 146 products as well as from demand and supply data - an

“A LA CARTE” Report

REAL-TIME

All reports are produced and delivered online in minutes from **FFT's** continuously updated international Food & Drink Markets Database, bringing you:

FAST, RELIABLE & TRULY UP-TO-DATE Support

A LA CARTE

“ What you need, when you need it ! ”

- Retail, Foodservice and Total Markets by Volume and Value
- Company Market Shares and Key Subsidiaries By Country and Product Market
- Company Profiles
- Own Label, branded, unbranded and artisanal market shares.
- Major Brands and "Who owns Whom"

▶ See “What You Get” and “Free Trial” @ www.fft.com

Ranging from a single data item (e.g. a company's ice cream market share in Norway) to a complete breakdown of market and Industry structure across 25 countries



100 Selected FFT Clients

(from over 1000 clients)



Food & Drink

Alfred L. Wolff
Allied Mills
Arla Foods
Avebe
Barilla
Baxters Food Group
Beghin-Say
Bonduelle
British Sugar
Cadbury Schweppes
Campbell Soup
Cargill International
CSM
Coca-Cola
Cuisiner
Danone
Del Monte
Farm Frites
Friesland Foods Int'l
General Mills
H.J. Heinz
Henkell & Soehnlein
Hero
Homina
Kerry Foods
Kraft International
Maple Leaf
Mars/Masterfoods/Effem
Materna
Max Havelaar Belgium
McCain Foods
MD Foods
Migros
Nestle
Nippon Suisan
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
Warsteiner Brauerei

Consultancy

Accenture
Arthur D. Little
Bain & Company
BHG Beteil. und Holding GmbH
Boer & Croon Corporate Strategy
Booz, Allen & Hamilton
Boston Consulting Group
Coopers & Lybrand, Deloitte
Ernst & Young
Giract
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 Cooper
Stamford Partners

Ingredients

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

Banking, Investment & M&A

ABN AMRO
Bank of America
BNP Paribas
Cazenove Partners
Credit Suisse First Boston
Deutsche Bank
Estin & Co.
Glitnir
Goldman Sachs
HSBC
J.P. Morgan
Lazard Freres
Lehman Brothers
Merrill Lynch
Morgan Stanley
NIBC Bank NV
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
Dole Packaged Foods
Flexpakko
Impress Group
Intralox
Maschinenbau
Mead Verpakking
Mizkan Group Corporation
Mondi Packaging
PKL Verpackungssysteme
Rintekno Oy
Scholle Corporation
Sealed Air
Siemens
SIG Combibloc
Sollac Aciers pour l'Emballage
Tetrapak
Veriplast
Wipak Walsrode

Key Definitions and Methodology

DEFINITION

General: Market data refer to all products sold for final human consumption in retail, catering 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.

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 each year, 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, enabling extensive cross-checking for verisimilitude. Foodservice demand data are arrived at by estimating the share of this market in each country and product market through field surveys and interviews, and applying this estimate to the total market previously established.

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.