



FULL REPORT CONTENT

All full reports present the following tables for each country, product, company and brand.

>> All tables are also available individually online.

TRIAL SUBSCRIPTION

You can reproduce the following tables yourself with the three selected products provided free-of-charge.

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 ensure this).

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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.
Company	These are expressed as a percentage of the total retail and foodservice market by value.
Market Shares:	Company market shares of less than 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.

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Provided online. Includes exchange rates; human, cat and dog populations; etc.

VOLUME 1: TOTAL MARKET

146 Product Markets available

9.1 ICE CREAM

PRODUCT GROUP ICE CREAM AND DESSERTS

Main Process Family: Frozen
Principal Meal Function: Dessert
Dry Weight Conversion Factor: ## 0.75

Product: Ice cream

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

UPDATE SCHEDULE
 All data updated in April / May each year. Annual Subscribers get Free Access.

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

Full Product Definitions
 Provided, comparable across all countries.

MARKET SIZE: VOLUME

Countries	Historical Markets			Forecast Markets			Historical & Forecast Growth			Market Analysis													
	2005	2009	2010	2011	2012	2013	2005-10	2005-10	2010-13	2010	Consumption per capita												
	Total (million liters)	Total (million liters)	Total (million liters)	Total (million liters)	Total (million liters)	Total (million liters)	Annual Growth (liters)	Annual Growth * (Av. Ann.%)	Annual Growth * (Av. Ann.%)	Market Shares (percent)	2004 (liters)	2009 (liters)	2004-09 Growth * (Av. Ann.%)										
Austria	55.8	57.4	57.8	58.2	58.5	59.0	0.40	0.7%	0.7%	0.6%	6.78	6.89	0.3%										
Belgium/Lux	84.5	88.2	89.3	COMPLETE AND COMPARABLE, RELIABLE AND UP-TO-DATE DATA, for ALL Country & Product Markets. (There are no gaps!)																			
Bulgaria	11.0	13.6	13.9																				
Canada	296.2	298.9	299.9																				
Czech Republic	68.0	72.0	73.0																				
Denmark	49.3	48.5	48.3																				
Finland	69.3	76.7	78.9																				
France	373.8	338.8	328.8																				
Germany	668.3	697.2	702.5											705.8	712.0	718.2	6.84	0.8%	0.9%	7.2%	8.10	8.48	0.7%
Greece	93.1	98.0	94.3											92.6	93.5	95.1	0.23	0.5%					0.2%
Hungary	38.0	41.5	42.2											42.8	43.0	43.2	0.83	2.0%					2.2%
Ireland	43.9	49.9	51.5	53.1	54.7	56.4	1.52	3.2%					2.4%										
Italy	583.0	604.5	609.8	614.0	617.8	622.3	5.35	0.8%					0.8%										
Mexico	133.8	157.1	160.4	162.7	165.2	168.2	5.33	3.8%					2.9%										
Netherlands	136.8	128.9	126.7	124.3	122.6	120.5	-2.03	-1.7%	-1.5%	1.3%	8.38	7.70	-1.8%										
Norway	64.5	69.0	69.7	70.4	71.1	71.8	1.03	1.6%	1.0%	0.7%	13.96	14.28	0.5%										
Poland	102.0	137.5	139.0	142.0	146.5	148.3	7.40	5.9%	2.2%	1.4%	2.67	3.68	6.1%										
Portugal	71.3	83.0	83.6	86.4	FAST MARKET ASSESSMENT Detailed historical and forecast growth rates in Euros/US\$ and % growth point to opportunities and threats.																		
Romania	33.2	41.0	41.8	42.6																			
Slovakia	19.9	21.0	21.4	21.5																			
Spain	332.1	291.6	292.9	279.3																			
Sweden	89.1	90.7	91.5	93.4																			
Switzerland	54.8	56.7	57.1	57.5											57.9	58.4	0.46	0.8%	0.8%	0.6%	7.37	7.40	0.0%
United Kingdom	468.7	482.4	484.1	482.7											480.5	482.2	3.08	0.3%	0.0%	4.9%	7.78	7.77	-0.4%
United States	6 250.0	5 831.0	5 747.5	5 692.6											5 617.1	5 546.6	-100.51	-1.4%	-1.3%	58.6%	21.12	18.60	-2.2%
Total	10 190.4	9 875.0	9 805.6	9 748.9											9 686.3	9 635.6	- 76.96	-0.7%	-0.6%	100.0%	11.03	10.32	-1.2%

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 this Ready-to-Eat / Ready-to-Drink Dry Weight Conversion Factor.

* Applying full exponential regression curve analysis which includes data for all intermediary years. Excludes the "quality" factor, i.e. assumes product continuity.

Source: Food for Thought

Note: Illustrative Data Only Presented

VOLUME 1: TOTAL MARKET

PRODUCT GROUP: ICE CREAM AND DESSERTS

Main Process Family: Frozen

Product: Ice cream

Principal Meal Function: Dessert

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

UPDATE SCHEDULE
All data updated in April / May each year. Annual Subscribers get Free Access.

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

Full Product Definitions
Provided, comparable across all countries.

MARKET SIZE: VALUE

Countries	Historical Markets			Forecast Markets **			Historical & Forecast Growth			Market Analysis			
	2005	2009	2010	2011	2012	2013	2005-10	2005-10	2010-13	2010	2010	2010	
	(Current Euro millions)	(Current Euro millions)	(Current Euro millions)	(Constant 2008 Euro millions)	(Current 2008 Euro millions)	(Current 2008 Euro millions)	Ann. Gr. (Current Euro m.)	Ann. Gr. (Av. annual real %)*	Ann. Gr. (Av. annual real %)**	Market (Local Currency millions)	Market Shares (percent)	Expend. per capita (Euros)	
Austria	201.3	230.0	234.3	239.3	244.6	250.1	6.6	1.4%	0.5%	EUR	234.3	0.8%	27.91
Belgium/Lux	347.0	388.5	399.2	411.2	422.5	435.6	10.5	1.1%	1.0%	EUR	399.2	1.3%	35.25
Bulgaria	40.1	67.9	70.7	74.1	77.8	80.9	6.1	4.9%	1.6%	BGL	138.3	0.2%	9.35
Canada	659.6	712.1									1 139.6	2.7%	24.82
Czech Republic	255.7	379.2									10 286.7	1.3%	39.58
Denmark	192.9	207.5									1 539.8	0.7%	37.56
Finland	216.0	250.5									267.9	0.9%	50.10
France	1 852.6	1 532.7									1 506.0	4.9%	24.11
Germany	3 104.4	3 492.6									3 548.2	11.5%	42.84
Greece	385.5	442.7									414.4	1.3%	36.72
Hungary	162.5	205.6	222.3	232.5	240.7	248.5	12.0	3.8%	0.7%	HUF	61 229.9	0.7%	22.21
Ireland	194.6	234.0	244.8	255.5	266.2	277.7	10.0	2.1%	2.6%	EUR	244.8	0.8%	56.31
Italy	2 759.8	3 068.1	3 117.2								3 117.2	10.1%	52.83
Mexico	198.4	206.2	241.4								4 047.1	0.8%	2.23
Netherlands	639.5	630.0	622.4								622.4	2.0%	37.84
Norway	219.8	248.1	278.9								2 232.7	0.9%	57.17
Poland	276.2	431.2	481.6								1 923.7	1.6%	12.74
Portugal	327.5	389.0	384.6	394.3	405.1	414.8	11.4	2.0%	1.2%	EUR	384.6	1.3%	36.19
Romania	106.3	141.5	153.5	164.4	171.9	178.7	9.4	4.9%	1.5%	ROL	646.5	0.5%	7.15
Slovakia	72.2	113.4	115.3	117.6	119.7	122.0	8.6				115.3	0.4%	21.35
Spain	1 248.5	1 045.7	1 045.6	995.2	974.7	976.3	-40.6				1 045.6	3.4%	23.40
Sweden	434.0	429.8	490.8	509.3	528.2	545.4	11.4				4 680.6	1.6%	52.87
Switzerland	329.7	353.1	386.9	388.2	391.9	396.2	11.4				534.1	1.3%	50.15
United Kingdom	1 996.5	1 620.6	1 717.0	1 738.4	1 748.1	1 773.8	-55.9	-1.5%	-0.9%	GBP	1 472.9	5.6%	27.56
United States	13 704.7	12 847.3	13 345.8	13 268.0	13 222.2	12 850.3	-71.8	-1.0%	-2.3%	USD	17 692.5	43.4%	43.20
Total	29 925.2	29 667.5	30 737.0	30 849.8	31 086.5	31 034.9	162.4	0.4%	0.4%			100.0%	32.36

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 exponential regression curve analysis which includes data for all intermediary years. Based on local currencies applying country/product food price deflators to value data to obtain constant prices. If currency change, e.g. to Euros, new currency data converted back to local currencies using last available last exchange rate to avoid exchange rate effects. Excludes the "quality" factor, i.e. assumes product continuity.

** Applying last historic year exchange rates and current euros (hence no inflation effect on forecast growth calculations).

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: 44.0% (by volume)

Dry Weight Conversion Factor:## 0.75

Single Product volume da Dairy/non-dairy ice cream and sorbets, industrial and artisanal (including estimates of underrecorded artisanal), soft ice.

UPDATE SCHEDULE
All data updated in April / May each year.
Annual Subscribers get Free Access.

MARKET SIZE BY VOLUME

Full Product Definitions
Provided, comparable across all countries.

Countries	Total 2010 Markets			National Market	Total Market		Consumption Per Capita		Foodservice Rankings		
	Foodserv. Market (million litres)	Retail Market (million litres)	Total Market (million litres)	Foodserv. Share (%)	Foodserv. Share (%)	Retail Share (%)	Foodserv. (litres)	Retail (litres)	Total Mkt Size	Nat'l Mkt Share	Per Capita Cons.
Austria	15.6	42.2	57.8	27.1%	0.3%	0.9%	1.86	5.02	21	21	18
Belgium/Lux	29.0	60.3					2.56	5.32	15	16	15
Bulgaria	2.4	11.5					0.32	1.51	25	24	24
Canada	146.0	154.0					4.34	4.58	6	8	7
Czech Republic	21.0	52.0					2.05	5.05	18	20	17
Denmark	25.1	23.2					4.56	4.21	16	7	6
Finland	29.8	49.1	78.9	37.8%	0.6%	1.0%	5.58	9.18	13	14	2
France	96.3	232.4	328.8	29.3%	1.9%	4.9%	1.54	3.72	8	19	20
Germany	234.6	467.9	702.5	33.4%	4.6%	9.9%	2.83	5.65	4	15	14
Greece	45.9	48.4	94.3	48.7%	0.9%	1.0%	4.07	4.29	11	9	10
Hungary	8.3	33.9	42.2	19.7%	0.2%	0.7%	0.83	3.39	23	23	23
Ireland	23.3	28.1	51.5	45.3%	0.5%	0.6%	5.36	6.48	17	10	3
Italy	271.7	338.1	609.8	44.6%	5.3%	7.2%	4.60	5.73	2	11	5
Mexico	98.6	61.9	160.4	61.4%	1.9%	1.3%	0.91	0.57	7	2	22
Netherlands	53.8	72.8	126.7	42.5%	1.1%	1.5%	3.27	4.43	10	13	13
Norway	20.7	49.0	69.7	29.7%	0.4%	1.0%	4.24	10.05	19	18	8
Poland	44.1	94.9	139.0	31.8%	0.9%	2.0%	1.17	2.51	12	17	21
Portugal	54.5	29.1	83.6	65.2%	1.1%	0.6%	5.13	2.74	9	1	4
Romania	5.6	36.2	41.8	13.4%	0.1%						
Slovakia					0.2%						
Spain					3.4%						
Sweden					0.4%						
Switzerland					0.6%						
United Kingdom	256.2	227.9	484.1	52.9%	5.0%	4.8%	4.11	3.66	3	5	9
United States	3 389.2	2 358.3	5 747.5	59.0%	66.4%	50.2%	10.97	7.63	1	3	1
Total	5 103.3	4 702.3	9 805.6	52.0%	100.0%	100.0%	5.37	4.95			

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)

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. ## Countries listed except Norway & Switzerland

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: 37.6% (by value)

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

Data year provided - All Countries
Updated April / May Each Year - Annual
Subscribers get free access.

MARKET SIZE BY VALUE

Full Product Definitions
Provided, comparable
across all countries.

Countries	Local	Total 2010 Markets					Food-service Share in Nat'l Mkt (%)	Expenditure Per Capita		Foodservice Rankings		
		Foodserv. Market	Retail Market	Foodserv. Market	Retail Market	Total Market		Foodserv.	Retail	Total Mkt Size	Nat'l Mkt Share	Per Capita Exp.
		(Local millions)	(Local millions)	(Euro millions)	(Euro millions)	(Euro millions)		(Euros)	(Euros)			
Austria	EUR	53.9	180.4	53.9	180.4	234.3	23.0%	6.42	21.49	21	21	19
Belgium/Lux	EUR	110.3						9.74	25.51	14	16	16
Bulgaria	BGL	20.5						1.38	7.96	25	24	23
Canada	CAD	471.4						10.27	14.55	7	8	14
Czech Republic	CZK	2 520.1						9.70	29.88	15	20	17
Denmark	DKK	680.3						16.60	20.97	18	7	6
Finland	EUR	86.1	181.8	86.1	181.8	267.9	32.1%	16.10	34.00	19	14	7
France	EUR	375.0	1 131.0	375.0	1 131.0	1 506.0	24.9%	6.00	18.11	6	19	20
Germany	EUR	1 007.2	2 541.0	1 007.2	2 541.0	3 548.2	28.4%	12.16	30.68	3	15	12
Greece	EUR	171.4	243.0	171.4	243.0	414.4	41.4%	15.19	21.53	10	8	8
Hungary	HUF	10 233.0	50 996.9	37.1	185.1	222.3	16.7%	3.71	18.50	23	23	21
Ireland	EUR	94.3	150.5	94.3	150.5				34.62	16	10	2
Italy	EUR	1 180.6	1 936.6	1 180.6	1 936.6				32.82	2	11	5
Mexico	MXN	2 113.0	1 934.0	126.0	115.4				1.06	13	2	24
Netherlands	EUR	224.8	397.5	224.8	397.5				24.17	8	13	10
Norway	NOK	562.7	1 669.9	70.3	208.6	278.9	25.2%	14.41	42.76	20	18	9
Poland	PLZ	519.2	1 404.5	130.0	351.6	481.6	27.0%	3.44	9.30	12	17	22
Portugal	EUR	213.1	171.4	213.1	171.4	384.6	55.4%	20.06	16.13	9	1	4
Romania	ROL					153.5	11.4%	0.82	6.34	24	25	25
Slovakia	EUR											18
Spain	EUR											13
Sweden	SEK	895.6	3 785.0	93.9	396.9							15
Switzerland	CHF	236.4	297.7	171.3	215.7							1
United Kingdom	GBP	662.5	810.4	772.3	944.6							11
United States	USD	8 868.0	8 824.5	6 689.3	6 656.5	13 345.8	50.1%	21.65	21.55	1	3	3
Total				12 735.7	18 001.3	30 737.0	41.4%	13.41	18.95			

A UNIQUE COMPLETE PANORAMA OF RETAIL & FOODSERVICE MARKETS BY VALUE

Purchasing Power varies greatly from country to country

Local Currency and US\$ or Euro value data provided.

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

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. ## Countries listed except Norway & Switzerland

Note: Illustrative Data Only Presented

VOLUME 3: COMPANY MARKET SHARES

9.1 ICE CREAM

N° Ultimate Holding Co.s cited: 40
 N° Key Subsidiaries cited: 34

2011 COMPANY MARKET SHARES BY VALUE ^a
 [Mergers and acquisitions updated regularly]

114 Single Product Markets
 and 32 Product Groups available

ULTIMATE HOLDING COMPANY	Any Country Selection (from 1 to 25) possible, table extends to right >>>							TOTAL 7-Country Market Shares (N° Countries Present)**
	Belgium/Luxemburg	France	Germany	Italy	Netherlands	Spain	United Kingdom	
Unilever	Ola	Unilever Glaces	Unilever	Sagit	Iglo-Mora	Friigo	Unilever IC&FF	Unilever 28.4% (7 countries)
Key subsidiaries identified		27.8%	31.3%	23.8%	33.8%	24.3%	34.0%	
		Nestlé Grand Frd	Schöller	Italgel				Nestlé 19.5% (6 countries)
Artisanal*	Artisanal	Artisanal	Artisanal	Artisanal				Artisanal* 13.7% (7 countries)
Oaktree Capital							Richmond Foods	Oaktree Capital 7.7% (5 countries)
Mars	Mars						Mars UK	Mars 4.4% (7 countries)
Sammontana								Sammontana 1.7% (1 country)
General Mills				Häagen Dazs	Häagen Dazs	Häagen Dazs	Häagen Dazs	General Mills 1.7% (6 countries)
G7				G7				G7 1.5% (1 country)
Sub-Total	54%	74%	86%	85%	75%	57%	79%	79%
Ultimate Holding Company:	CNP	Rolland	Rosen Eiskrem	Barilla				Rosen Eiskrem 1.5% (1 country)
In the TOP HALF of the table, the Top-8 suppliers are listed by total market share (last column) and their presence set out country by country.				Sanson				
				Gis Gelati				
In the BOTTOM HALF of the table, other companies of national significance are listed.				Gis Gelati				PNIC 1.2% (1 country)
	OTHER	11.1%	4.5%	0.9%	3.0%	5.5%	3.4%	1.8%
UHC	Mio	Milcobel	HMU	Mantua Surgelati	Moraco	Carrascal	Creamery Fare	Milcobel 1.0% (5 countries)
SUB	Mio	Ysco	HMU	Mantua Surgelati	Artic	Carrascal	Creamery Fare	
UHC	5.0%	3.5%	0.6%	2.5%	3.5%	3.3%	1.6%	
SUB	Milcobel	ITM					Frederick's Dairies	Rolland 0.8% (4 countries)
UHC	Ysco	Délices Val-Ples.					Frederick's Dairies	
SUB	4.5%	2.2%					1.6%	
UHC	Vande-moortele	Thiriet	Durigon	Fruttadoro	Ijsfabriek Scheijndel	Nueva Rumasa	Greencore	Moraco 0.8% (4 countries)
SUB	Alpro	Thiriet	Durigon	Orogel	Ijsfabriek Scheijndel	Clesa	Robert's	
UHC	1.5%	2.1%	0.6%	1.0%	2.6%			
SUB	4.4%	9.3%	6.3%	5.1%	4.3%			
All Other Companies								16.0%
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Of which:**	Branded 83.4%	72.7%	60.5%	59.6%	83.7%	80.1%	72.3%	67.5%
Unbranded								
Artisanal	9.7%	6.9%	10.5%	33.0%	8.9%	3.0%	3.5%	13.7%
Own Label (in total)	6.9%	20.4%	29.0%	7.5%	7.4%	16.9%	24.2%	18.8%
Own Label (in retail)	9.8%	27.7%	41.5%	12.4%	12.0%	36.0%	46.1%	29.9%
2010 Total Market (EUR m.)	399.9	1,694.3	3,530.8	3,075.8	619.2	1,180.9	1,838.3	12,339.3

Presenting FFT's Unique Strategic Analysis of MAJOR FOOD MANUFACTURERS

- All holding companies/key subsidiaries/country and regional market shares for each product selected;
- Market dominance of top companies by country and regionally
- branded vs own label, unbranded and artisanal

COMPLETE STRATEGIC PICTURE
 ALL final human consumption included - retail, foodservice and "artisanal", such as independent bakers.

MERGER & ACQUISITION OPPORTUNITIES
 Play Strategic Dominos....
 Match blank squares or low market shares with other companies in a country column to spot possible M&A opportunities!
 Then Check the Company Profiles!

STRATEGIC COMPANY PROFILES
 Want to find out more about a company?
 10,000+ Strategic Company Profiles are available on FFT's online database.

Market Value Totals Provided

The Top-13 Companies (for the countries selected)

Complete Branded Vs Own Label, Unbranded and Artisanal (own-produced for own sale) analysed.

^a Definition: Market shares are by VALUE, and refer to ALL products SOLD for final human consumption in retail, catering and artisanal* markets (see total market data at bottom of table);
 Company abbreviations: See annexes or fft.com website co. search. * Artisanal: Own-produced for own sale (e.g. independent bakers, considered here as a single competitive entity/company).
 Edition: Continuously updated. ** Latest market values used for weighted averages. # Company shares listed above may include several categories.

Note: Illustrative Data Only Presented

All Companies this selection in alphabetic order

VOLUME 4: STRATEGIC COMPANY PORTFOLIOS

2011 COMPANY MARKET SHARES AND RANKINGS

AGROLIMEN TO ZOTT

Any combination of **114 Single Product Markets available**
Report sample here is for the Desserts Market

(Updated continuously)
N° of Country Markets: 7
N° of Product Markets: 3
N° of Market Shares: 323
N° of Holding Companies: 170
N° of Key Subsidiaries: 127
N° of All Companies cited: 297

297 Companies + 323 Co. Market Shares
for this very small sample
(3 products * 7 countries = 21 markets out of 3000+ available)

Company and Product Market		Country Operating Companies and Market Shares (Country Product Market Rankings in brackets)							7-Selected Country Market Shares		Share of Co. Food & Drink Sales *
		Belgium/Lux.	France	Germany	Italy	Netherlands	Spain	United Kingdom	Product Market	All Food & Drink	
<p>Any Country Selection (from 1 to 25) possible, table extends to right</p>											
Agrolimen	9.3 Powdered Desserts							Gallina Blanca	1.30%	0.036%	100.0%
		<p>The Desserts Market: 9.1 Ice Cream 9.2 Chilled Dairy Desserts 9.3 Powdered Desserts</p>									
Aiadhesa	9.1 Ice Cream							Aiadhesa	0.32%	0.190%	100.0%
		<ul style="list-style-type: none"> Key Country Subsidiaries Product and Country Market Shares Product and Country Rankings 									
Andros	9.2 Chilled Dairy Desserts		Novandie		Andros				2.53%	0.952%	85.3%
		<p>Contribution to Company Sales Turnover Estimated % contribution of each product market to company sales turnover (adds up to 100%)</p>									
Andros	9.1 Ice Cream		Prolainat						0.27%	0.164%	14.7%
		<p>EXHAUSTIVE A-Z COMPANY LISTING (here the 1st of 20 pages for Desserts in 7 Country Markets from AC Capital to Zott, or 300 companies altogether) ALL companies for the product markets and countries selected are listed, in alphabetic order, together with their:</p>									
Arla Foods	9.2 Chilled Dairy Desserts							Int'l	0.23%	0.088%	100.0%
		<p>STRATEGIC COMPANY PROFILES Want to know more? Go to "10,000+ Companies" online and download a specific company profile !</p>									
Bain Capital	9.1 Ice Cream							Brake Bros	0.14%	0.840%	100.0%
		<p>Regional Co. Market Share Each company's overall market share given for the countries selected,</p>									
Bakkavör	9.2 Chilled Dairy Desserts							Isleport	0.07%	0.028%	100.0%
		<ul style="list-style-type: none"> as well as for the overall All Country + Product Market Share for all the countries and products selected (here 7 countries*3 product markets = 21 markets) 									
Barilla	9.1 Ice Cream				Sanson				0.76%	0.451%	100.0%
<p>And 314 A to Z Companies later</p>											
Zott	9.2 Chilled Dairy Desserts		Zott	Zott					1.76%	0.661%	100.0%

* 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 (FFT)

Note: Illustrative Data Only Presented

VOLUME 5: MAJOR BRANDS AND "WHO OWNS WHOM"

MAJOR BRANDS BY PRODUCT & COUNTRY MARKET					
No.	Product Name	C'try	Holding Co.	Subsidiary	Major Brands
9.1	Ice cream	A	Berglandmilch Rottaler	Alpi Milchindust.	Eis Perfekt
9.1	Ice cream	A	General Mills	Häagen Dazs	Häagen Dazs
9.1	Ice cream	A	Mars	Mars Austria	Bounty, Dove Milk, Mars, Milky Way, Milky Way Star, Opal fruits, Snickers, Twix
9.1	Ice cream	A	Nestlé	Schöller	Bahia, Beach Fresh, Cono, Eiszweg, Frubetto, Jumbo Fru, Manhatten, Motta, Mövenpick, Schöller
9.1	Ice cream	A	Oaktree Capital	Roncadin Eis	Dr Oetker, Landliebe
9.1	Ice cream	A	Tirol Milch	Tirol Milch	TiMi
9.1	Ice cream	A	Unilever	Eskimo	Boomy, Bubidu, Calippo, Camillino, Cornetto, Cremissimo, Eskimo, Jolly, Langfinger, Magnum, Mampfbacke, Nogger, Paiper, Quaxi, Romero, Solero, Sorbetteria, Spirello, Super Mario, Twinni, Twister, Viennetta
9.1	Ice cream			Ijsboerke	Bavarois Framboise, Big Exotic, Braziliانا, Coppa Vegra, Dino, Ijsboerke, La Luna, Lollie-Cola, Mini Bigs, Peep-Up, Picco's Dame Blanche, Super Cocco, Yoghurt Ice
9.1	Ice cream			A Pilpa	Pilpa
9.1	Ice cream			Häagen Dazs	Bailey's, Häagen Dazs
9.1	Ice cream	B/L	La Vie	La Vie	La Vie
9.1	Ice cream	B/L	Linea Verde	Linea Verde	Esselunga, Tartufi, Tiramisu
9.1	Ice cream	B/L	Mars	Mars	Bounty, Mars, Milky Way, Opal Fruits, Snickers, Starburst, Twix
9.1	Ice cream	B/L	Milcobel	Ysco	Appassionato, Bioline, Krio, Melissa, Natural Line, Orangina, Royal, Tropical, Tuffino, Ysco
9.1	Ice cream	B/L	Mio	Mio	
9.1	Ice cream	B/L	Moraco	Artic	Artic, Black Choc, Brasileiro, Cornets d'Amour, Expo, Frisa Bar, Frisko, Kid Limbo, Noisella, Perletta, Prestige, Slammer, Superbig, Top fruit, Violini
			Nestlé	Schöller	Campina Ijs, Frubetto, Galak, Gammon, Jive, Lion, Mövenpick, Okay Ijs, Peach Yoghurt, Pinti, Schöller, Symphony

Any Country and Product Selection Possible

Major Brands are listed by product, country, holding company and key local subsidiary.

OVER 30,000 MAJOR BRANDS are cited in the database.

Brands Listings by Product and by Holding Company are provided in each report.

BRANDS BY ULTIMATE HOLDING COMPANY					
Holding Co.	Operating Co.	No.	Product Name	C'try	Major Brands
Caldos del Norte	Caldos del Norte	9.3	Powdered Desserts	ESP	Calnort
Campbell Soup	Campbell Foods	9.3	Powdered Desserts	BEL	Imperial
Campina	Strothmann	9.2	Chilled Dairy Desserts	AUT	Dreikorn, Strothmann
Campina	Campina AG	9.2	Chilled Dairy Desserts	BEL	Fruttis, Puddis
Campina	Campina AG	9.2	Chilled Dairy Desserts	FRA	Frudise, Strothmann
Campina	Campina	9.2	Chilled Dairy Desserts	DEU	Landliebe Milchreis, Mark Brandenburg, Puddis, Strothmann, Südmilch, Vanilla Kiss
Campina	Campina Melkur	9.2	Chilled Dairy Desserts	NLD	Bon-O-Mel, Campina, Friline, Fruttis, Momentvla, Mona, Puddis, Tuffi
Campina	Lacteos Campir	9.2	Chilled Dairy Desserts	ESP	Mondelice
Campina	Campina MKW	9.2	Chilled Dairy Desserts	GBR	Delice, Vifit
Campina	Campina Melkur	9.3	Powdered Desserts	NLD	Royale
Carrascal	Carrascal	9.1	Ice Cream	ESP	Carrascal
Casty	Casty	9.1	Ice Cream	ESP	Casty
Central Lechera Asturiana	Corporacion Alir	9.2	Chilled Dairy Desserts	ESP	Asturiana, Clas
Centrale del Latte di Tori	Centrale del Lat	9.2	Chilled Dairy Desserts	ITA	Centrale del Latte di Torino
Champagne Céréales	France Farine	9.3	Powdered Desserts	FRA	Francine
Cityback Berlin	Cityback Berlin	9.1	Ice Cream	DEU	American Paradise
Colussi	Bindi	9.1	Ice Cream	ITA	Bindi, Misura
Compagnie Nationale à F	Ijsboerke	9.1	Ice Cream	BEL	Bavarois Framboise, Big Exotic, Braziliانا, Coppa Vegra, Dino, Ijsboerke, La Luna, Lollie-Cola, Mini Bigs, Peep-Up, Picco's Dame Blanche, Super Cocco, Yoghurt Ice
Compagnie Nationale à F	Ijsboerke			DEU	Ijsboerke
Consorzio Granlatte	Consorzio			ITA	Accadi, Bunette, Granarolo, Mandriot, Mandriot Gel, Tartufo, Tiramisù, Torgelé, Torpana, Verbano
Consumenten Produkten	Consumenten P	9.1	Ice Cream	NLD	Fido Dido, Kwak
General Mills	General Mills	9.3	Powdered Desserts	FIN	Betty Crocker
General Mills	General Mills	9.3	Powdered Desserts	GRC	Pillsbury
Gis Gelati	Gis Gelati	9.1	Ice Cream	ITA	Ar Blu, Dolci Delizie, Gis, Gisoia, La Botega del Buon Gelato, Nivene, Sorrana, Top Cream, Viviana
Glanbia	Glanbia	9.1	Ice Cream	IRL	Yoplait Frozen Yoghurt
Glanbia	Glanbia	9.2	Chilled Dairy Desserts	IRL	Avonmore Afters, Choc Mousse, Fruit Fool, Kilmeaden, Petits Filous Little Desserts

Companies active in the products and countries selected and their major brands can be quickly identified.

Key Local Subsidiaries are systematically identified

Note: Illustrative Data Only Presented

REPORTS FOR ANY COMBINATION OF COUNTRIES, REPORTS AND DATA ARE PRODUCED AUTOMATICALLY ONLINE
Here are just a very few examples !

SAMPLE REGIONAL MARKET REPORTS
Full Descriptions available online at <http://www.fft.com>

Estimated No. of Companies and Shares per Report (Contact FFT for more)

Sample Report Titles	No. of Products	Product Markets Included in Each Report	Est. No. of Companies per Report				Est. No. Co. Market Shares quoted			
			Western Europe (16 C'tries)	Central Europe (6 C'tries)	North America (3 C'tries)	All 3 Regions (25 C'tries)	Western Europe (16 C'tries)	Central Europe (6 C'tries)	North America (3 C'tries)	All 3 Regions (25 C'tries)
Alcoholic Drinks	4	All Alcoholic Beverages, Beer, Wine, Still wine, Sparkling wine, Aperitifs & Spirits	1011	384	172	1183	1092	424	183	1686
All Fresh & Processed fish	4	All Fresh & Processed Fish, Fresh Fish, Canned Fish, Frozen Fish, and Dried, salted, and smoked fish	1014	207	120	952	752	283	138	1169
Baby Foods	3	All Baby Foods, Baby jars, Baby milks, Other baby foods	1001	65	24	161	210	113	35	363
Bakery Products	8	All Flour & Bakery, Flour (retail only), Bread products, Crispbread, Industrial pastry, Biscuits, Frozen pastry products, All Pasta, Fresh Pasta, Dry Pasta	1002	389	197	1523	1405	448	248	2076
Canned Products	10	Canned fruit, Canned vegetables, Canned and cartoned soup, Canned meat, Canned fish, Canned pasta, Canned ready meals, Baby Foods, Canned Cat, Canned Dog	10 000+ FOOD & DRINK COMPANIES FFT Reports provide unparalleled coverage of Companies and their Market Shares... see below...							2718
Cheese	3	Fresh cheese, Natural cheese, Processed cheese								1006
Confectionery	4	All Sugar Confectionery, Chewing gum, Other sugar confectionery, All Chocolate Confectionery, Chocolate countlines, Other chocolate confectionery	1007	338	108	982	1035	512	161	1721
Dairy Products	7	Liquid milk, Cream, Yoghurt, Condensed milk, Powdered milk, Ice cream, Chilled dairy desserts	1008	215	101	616	571	298	119	993
Dehydrated Products	8	Dehydrated potato, Powdered milk, Powdered desserts, Dehydrated soup, Dehydrated sauces, Dehydrated ready meals, Soluble coffee, Baby milks (retail only)	• Dairy in Western Europe (16 countries): 593 companies and 1048 market shares							3176
Desserts	9	Industrial pastry, Frozen pastry products, Cream, Yoghurt, Fresh cheese, Natural cheese, All Desserts & Ice Cream, Ice cream, Chilled dairy desserts,								1009
Dressings & Condiments	8	All Dressings & Condiments, Mayonnaise, Salad dressings, Ketchup, Vegetables in Vinegar, Mustard, Table salt, Herbs & spices, Vinegar	1010	266	107	907	930	380	148	1450
Fresh & Processed Meat	10	All Fresh and Processed Meat, All Fresh Meat, Beef, Pork, Mutton, Poultry, Other fresh meat, All Processed Meat, Canned meat, Frozen convenience meat, Cured meat, Bacon & ham,	1019	499	201	1835	1915	843	270	3028
Fresh Meat	5	All Fresh Meat, Beef, Pork, Mutton, Poultry, Other fresh meat	1020	289	117	926	789	387	128	1307
Fresh Products	10	Fresh fruit, Fresh vegetables, Fresh potatoes, Eggs, All Fresh & Processed Meat, Beef, Pork, Mutton, Poultry, Other fresh meat, Fresh fish	1015	402	213	1591	1331	530	234	2088
Frozen Foods	10	Frozen pastry products, Frozen fruit, Frozen vegetables, Frozen potato, Ice cream, Frozen soup, Frozen convenience meat, Frozen fish, Frozen pizza, Frozen ready meals	• Frozen Foods in Central Europe (6 countries): 390 companies and 492 market shares							2547
Fruits	3	Fresh fruit, Canned fruit, Frozen fruit								1016
Hot Beverages	6	All Hot Beverages, Bean and ground coffee, Soluble coffee, Coffee substitutes, Black tea, Herbal teas, Powd. choc. & malted drinks	• Ready Meals in N. America, W. and C. Europe: 1079 Companies and 1433 Market Shares							1055
Jams & Spreads	3	All Preserves, Jams & marmalade, Honey, Other sweet spreads								1025
Oils And Fats (Edible)	7	All Oils & Fats, All Butter, Butter (standard), Other dairy spreads, All Margarine, Margarine (standard), Other non-dairy spreads, All Edible Oils, Olive oil, Other oils, Cooking fats (retail only)	1022	319	107	790	648	375	123	1159
Pasta & Pasta Sauces	3	All Pasta, Fresh Pasta, Dry Pasta, Pasta Sauces	Product Definitions ...are fully comparable across all country markets, offering a strategic picture across all countries and products.							707
Petfoods	4	All Petfoods, Canned cat food, Canned dog food, Dry/semi-moist cat food, Dry/semi-moist dog food								1027
Potato & Potato Products	4	All Potato & Potato Products, Fresh potatoes, Potato crisps, Frozen potato, Dehydrated potato	1026	197	132	1079	1096	219	159	1433
Processed Meat	5	All Processed Meat, Canned meat, Frozen convenience meat, Cured meat, Bacon & ham, Delicatessen products	• Soft Drinks & Juices in North America (3 countries): 177 companies and 240 market shares							559
Ready Meals	7	All Ready Meals, Canned pasta, Canned ready meals, Dehydrated ready meals, Frozen pizza, Frozen ready meals, Chilled ready meals, Sandwiches								1027
Sauces	6	All Canned & Cartoned Sauces, Canned tomato, Tomato concentrate, Pasta sauces, Other canned sauces, Dehydrated sauces, Bouillon cubes	1013	339	177	1167	1269	484	240	1918
Savoury Snacks	4	All Savoury Snacks, Nuts, Savoury biscuits, Extruded snacks, Potato crisps	1030	62	49	292	297	91	56	431
Soft Drinks & Juices	7	All Soft Drinks & Juices, Mineral water, Soft drinks, Fruit juices and drinks, Fruit juices, Fruit drinks, Squashes and concentrates, Health & sports drinks, Iced tea	1029	272	201	1277	1377	369	264	2005
Soups	4	Canned and cartoned soup, Dehydrated soup, Frozen soup, Bouillon cubes	• Soft Drinks & Juices in North America (3 countries): 177 companies and 240 market shares							431
Sweet Snacks	7	Industrial pastry, Biscuits, Frozen pastry products, All Sugar Confectionery, Chewing gum, Other sugar confectionery, All Chocolate Confectionery, Chocolate countlines, Other chocolate confectionery								1031
Vegetables	4	Fresh vegetables, Canned vegetables, Frozen vegetables, Chilled vegetables	Average No. Co.s Per Report for above selection:							822
										0

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
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Materna
McCain Foods Limited
MD Foods
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