

**Food For Thought (FFT)  
Strategic Information Services**

# **The All Processed Meat Market in Eastern Europe**

**2011 Edition**

Disclaimer

Disclaimer and © Copyright: Whilst every possible care has been taken in the compilation, preparation and presentation of the information published in this report, no liability whatsoever can be accepted for the contents or their accuracy. No part of this work may be reproduced or utilised in any form or by any means, electronic or mechanical, including photocopying, internet or any other information storage or retrieval system, without prior written permission of the publishers.

**© 2011 Food For Thought (FFT) S.A.**

[www.fft.com](http://www.fft.com)

[sales-service@fft.com](mailto:sales-service@fft.com)

# FOREWORD

---

## LEGAL, DISCLAIMER and COPYRIGHT

---

- Legal:** This report is governed by the "Terms of Service" and "Legal & Disclaimer" sections to be found on FFT's online website at [www.fft.com](http://www.fft.com).
- Disclaimer:** Whilst every possible care has been taken in the compilation, preparation and presentation of the information published in this report, no liability whatsoever can be accepted for the contents or their accuracy.
- Copyright ©** No part of this work may be reproduced or utilised in any form or by any means, electronic or mechanical, including photocopying, internet or any other information storage or retrieval system, without prior written permission of the publishers.

---

## 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.

---

## 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. Foodservice Markets: The total (retail + foodservice) human consumption market is established first. An estimate of the food-service market share, derived from multiple sources and industry interviews, is then applied to this total. Owing to the extremely fragmented nature of the foodservice market, specific foodservice surveys are not considered feasible or reliable.

---

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

# THE ALL PROCESSED MEAT MARKET IN EASTERN EUROPE

## TABLE OF CONTENTS

|  |          |
|--|----------|
| <b>All Processed Meat Market Profile . . . . .</b>                                     | <b>4</b> |
| <b>Total Market by Volume, All Processed Meat</b>                                      | <b>4</b> |
| Detailed product definition, including local market particularities                    |          |
| Total Demand by Country and Region, '000 tons, 2005, 2009 and 2010                     |          |
| Country Market Shares by Volume in Total Market, 2010                                  |          |
| Total Market 5-year growth rates by Country and Region, 2005-2010                      |          |
| Per capita total market consumption by Country and Region, 2005 and 2010               |          |
| Per capita 5-year growth rates by Country and Region, percent, 2005-2010               |          |
| Strategic Assessment: Total Market, Growth and Consumption per capita                  |          |
| Rankings by Country Provided, and Regional Totals and Averages by Product              |          |
| <b>Total Market Value, All Processed Meat</b>  | <b>5</b> |
| Total Demand by Country and Region, Euro millions, 2005, 2009 and 2010                 |          |
| Total Demand by Country and Region, local currency millions, 2010                      |          |
| Country Market Shares by Value in Total Market, 2010                                   |          |
| Total Market Growth Rates by Value by Country and Region, real 5-year %, 2005-2010     |          |
| Forecasts: 5-year regional and 25-country real annual % total market growth, 2010-2015 |          |
| Per capita total market expenditure by Country and Region, 2010                        |          |
| Strategic Assessment: Total Market, Growth and Expenditure per capita                  |          |
| Rankings by Country Provided, and Regional Totals and Averages by Product              |          |
| <b>Retail And Foodservice Market by Volume, All Processed Meat</b>                     | <b>6</b> |
| Total Demand by Country and Region, '000 tons, 2010                                    |          |
| Foodservice Market Percent Share by Volume in each Country Market, 2010                |          |
| Retail and Foodservice Regional Market Shares by Volume, 2010                          |          |
| Retail and Foodservice per capita consumption by Country and Region, kgs, 2010         |          |
| Strategic Foodservice Assessment: Total Market, Country Market Share and               |          |
| Consumption per capita. Rankings by Country Provided, and Regional Totals and          |          |
| Averages by Product  |          |
| <b>Retail And Foodservice Market by Value, All Processed Meat</b>                      | <b>7</b> |
| Total Demand by Country and Region, Euro millions, 2010                                |          |
| Foodservice Market Percent Share by Value in each Country Market, 2010                 |          |
| Retail and Foodservice Regional Market Shares by Value, 2010                           |          |
| Retail and Foodservice per capita expenditure by Country and Region, Euro, kgs, 2010   |          |
| Strategic Foodservice Assessment: Total Market, Country Market Share and               |          |
| Consumption per capita. Rankings by Country Provided, and Regional Totals and          |          |
| Averages by Product  |          |
| <b>Company Market Shares, All Processed Meat</b>                                       | <b>8</b> |
| Up to 13 Holding Company Market Shares by Country and Region (updated monthly)         |          |
| Note: ALL companies and subsidiaries identified are listed in Company Profiles below   |          |
| Top-8 Holding Company "Strategic Presence & Absence" Analysis (updated monthly)        |          |
| Companies of national importance identified, including market shares (updated monthly) |          |
| Key Local Subsidiaries identified by Country and by Holding Company (updated monthly)  |          |
| Distribution Channel % Shares by Country and Region: Branded, Unbranded,               |          |
| Own (Private) Label and Artisanal (own-produced for own sale, e.g. bakers), 2011       |          |

Bulgaria to Slovakia and 6-Country Total

8

(blank page)