

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

The Frozen Foods Market in Major 7 West European Countries

2011 Edition

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FOREWORD

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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.

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 FROZEN FOODS MARKET IN MAJOR 7 WEST EUROPEAN COUNTRIES

TABLE OF CONTENTS

| | |
|--|-----------|
| Summary Market Tables | 15 |
| 2005 Total Expenditure | 15 |
| Belgium/Lux to United Kingdom and 7-Country Total | 15 |
| 2010 Total Expenditure | 16 |
| Belgium/Lux to United Kingdom and 7-Country Total | 16 |
| 2010 Retail Expenditure | 17 |
| Belgium/Lux to United Kingdom and 7-Country Total | 17 |
| 2010 Foodservice Expenditure | 18 |
| Belgium/Lux to United Kingdom and 7-Country Total | 18 |
| 2005-2010 Value Growth Rates | 19 |
| Belgium/Lux to United Kingdom and 7-Country Total | 19 |
| 2005-2010 Per Capita Growth Rates | 20 |
| Belgium/Lux to United Kingdom and 7-Country Total | 20 |
| 2010 Retail Market Share | 21 |
| Belgium/Lux to United Kingdom and 7-Country Total | 21 |
| 2010 Foodservice Market Share | 22 |
| Belgium/Lux to United Kingdom and 7-Country Total | 22 |
| 2010 Total Retail Market Share | 23 |
| Belgium/Lux to United Kingdom and 7-Country Total | 23 |
| 2010 Total Foodservice Market Share | 24 |
| Belgium/Lux to United Kingdom and 7-Country Total | 24 |
| | |
| Demand and Supply by Product | 25 |
| 1.6 Frozen Pastry Products Market Profile | 26 |
| Total Market by Volume, Frozen Pastry Products | 26 |
| 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 | |
| Total Market Value, Frozen Pastry Products | 27 |
| 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 | |
| Retail And Foodservice Market by Volume, Frozen Pastry Products | 28 |

| | |
|--|-----------|
| Total Demand by Country and Region, '000 tons, 2010 | 28 |
| 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 | |
| Retail And Foodservice Market by Value, Frozen Pastry Products | 29 |
| 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 | |
| Company Market Shares, Frozen Pastry Products | 30 |
| 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 | |
| Belgium/Lux to United Kingdom and 7-Country Total | 30 |
| 6.3 Frozen Fruit Market Profile | 32 |
| Total Market by Volume, Frozen Fruit | 32 |
| 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 | |
| Total Market Value, Frozen Fruit | 33 |
| 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 | |
| Retail And Foodservice Market by Volume, Frozen Fruit | 34 |
| 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 | 34 |
| 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 | |
| Retail And Foodservice Market by Value, Frozen Fruit | 35 |
| 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 | |
| Company Market Shares, Frozen Fruit | 36 |
| 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 | |
| Belgium/Lux to United Kingdom and 7-Country Total | 36 |
| 6.6 Frozen Vegetables Market Profile | 38 |
| Total Market by Volume, Frozen Vegetables | 38 |
| 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 | |
| Total Market Value, Frozen Vegetables | 39 |
| 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 | |
| Retail And Foodservice Market by Volume, Frozen Vegetables | 40 |
| 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 | 40 |
| Retail And Foodservice Market by Value, Frozen Vegetables | 41 |
| 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 | |
| Company Market Shares, Frozen Vegetables | 42 |
| 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 | |
| Belgium/Lux to United Kingdom and 7-Country Total | 42 |
| 7.3 Frozen Potato Market Profile | 44 |
| Total Market by Volume, Frozen Potato | 44 |
| 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 | |
| Total Market Value, Frozen Potato | 45 |
| 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 | |
| Retail And Foodservice Market by Volume, Frozen Potato | 46 |
| 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 | 46 |
| Retail And Foodservice Market by Value, Frozen Potato | 47 |
| 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 | |
| Company Market Shares, Frozen Potato | 48 |
| 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 | |
| Belgium/Lux to United Kingdom and 7-Country Total | 48 |
| 9.1 Ice Cream Market Profile | 50 |
| Total Market by Volume, Ice Cream | 50 |
| Detailed product definition, including local market particularities | |
| Total Demand by Country and Region, million litres, 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 | |
| Total Market Value, Ice Cream | 51 |
| 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 | |
| Retail And Foodservice Market by Volume, Ice Cream | 52 |
| Total Demand by Country and Region, million litres, 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, litres, 2010 | |
| Strategic Foodservice Assessment: Total Market, Country Market Share and Consumption per capita. Rankings by Country Provided, and Regional Totals and Averages by Product | |
| Retail And Foodservice Market by Value, Ice Cream | 53 |

| | |
|--|-----------|
| Total Demand by Country and Region, Euro millions, 2010 | 53 |
| 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, litres, 2010 | |
| Strategic Foodservice Assessment: Total Market, Country Market Share and Consumption per capita. Rankings by Country Provided, and Regional Totals and Averages by Product | |
| Company Market Shares, Ice Cream | 54 |
| 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 | |
| Belgium/Lux to United Kingdom and 7-Country Total | 54 |
| 12.3 Frozen Soup Market Profile | 56 |
| Total Market by Volume, Frozen Soup | 56 |
| 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 | |
| Total Market Value, Frozen Soup | 57 |
| 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 | |
| Retail And Foodservice Market by Volume, Frozen Soup | 58 |
| 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 | |
| Retail And Foodservice Market by Value, Frozen Soup | 59 |
| 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 | 59 |
| 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 | |
| Company Market Shares, Frozen Soup | 60 |
| 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 | |
| Belgium/Lux to United Kingdom and 7-Country Total | 60 |
| 13.22 Frozen Convenience meat Market Profile | 62 |
| Total Market by Volume, Frozen Convenience meat | 62 |
| 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 | |
| Total Market Value, Frozen Convenience meat | 63 |
| 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 | |
| Retail And Foodservice Market by Volume, Frozen Convenience meat | 64 |
| 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 | |
| Retail And Foodservice Market by Value, Frozen Convenience meat | 65 |
| 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 | 65 |
| Company Market Shares, Frozen Convenience meat | 66 |
| 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 | |
| Belgium/Lux to United Kingdom and 7-Country Total | 66 |
| 14.3 Frozen Fish Market Profile | 68 |
| Total Market by Volume, Frozen Fish | 68 |
| 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 | |
| Total Market Value, Frozen Fish | 69 |
| 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 | |
| Retail And Foodservice Market by Volume, Frozen Fish | 70 |
| 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 | |
| Retail And Foodservice Market by Value, Frozen Fish | 71 |
| 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 | 71 |
| Company Market Shares, Frozen Fish | 72 |
| 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 | |
| Belgium/Lux to United Kingdom and 7-Country Total | 72 |
| 15.4 Frozen Pizza Market Profile | 74 |
| Total Market by Volume, Frozen Pizza | 74 |
| 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 | |
| Total Market Value, Frozen Pizza | 75 |
| 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 | |
| Retail And Foodservice Market by Volume, Frozen Pizza | 76 |
| 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 | |
| Retail And Foodservice Market by Value, Frozen Pizza | 77 |
| 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 | |
| Company Market Shares, Frozen Pizza | 78 |

| | |
|--|-----------|
| Up to 13 Holding Company Market Shares by Country and Region (updated monthly) | 78 |
| 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 | |
| Belgium/Lux to United Kingdom and 7-Country Total | 78 |
| 15.5 Frozen Ready Meals Market Profile | 80 |
| Total Market by Volume, Frozen Ready Meals | 80 |
| 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 | |
| Total Market Value, Frozen Ready Meals | 81 |
| 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 | |
| Retail And Foodservice Market by Volume, Frozen Ready Meals | 82 |
| 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 | |
| Retail And Foodservice Market by Value, Frozen Ready Meals | 83 |
| 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 | |
| Company Market Shares, Frozen Ready Meals | 84 |
| 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) | 84 |
| 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 Belgium/Lux to United Kingdom and 7-Country Total | 84 |

Company Profiles 85

| | |
|---|-----|
| ALL companies and subsidiaries identified in the markets covered listed | |
| Holding Company Country and Product Market Shares & Rankings (updated monthly) | |
| Company Sales Turnover: Estimated % Contributions by Product & Region (updated monthly) | |
| Note: Applying 2011 Company Market Shares to 2010 Market Value data | |
| 11er Nahrungsm. to AC Capital | 86 |
| AC Capital to Agristo | 87 |
| Ahause Enscheder to Albafrut | 88 |
| Alcar to Angel Ló-pež Soto | 89 |
| Antárdida to Appetais | 90 |
| Aragonesa to Arena Holding | 91 |
| Arena Holding to Arrivé | 92 |
| Aryzta to Bain Capital | 93 |
| Bain Capital to Barry Callebaut | 94 |
| Baugur to Begro | 95 |
| Belfield Farms to Bofrost | 96 |
| Bofrost to Boiron | 97 |
| Bolton to Bononia | 98 |
| Bovleco to Bréchoire | 99 |
| Bürger to Carillon | 100 |
| Carnaby to Cebeco | 101 |
| Cecab to Clarebout | 102 |
| Clavo Coren to ConAgra | 103 |
| ConAgra to Connors Seafoods | 104 |
| Conopizza to Cosun | 105 |
| Cosun to Cremonini | 106 |
| Crestas La Galeta to Dal Freddo | 107 |
| Daloon to Darégal | 108 |
| Dayville's to Dicogel | 109 |
| Dicogel to Durigon | 110 |
| Döhler Citrus to Erhard | 111 |
| Erlen-bacher to Euro-Delight | 112 |
| Eurochamp to Fairway Foodservice | 113 |
| Fandi-costa to Fingel | 114 |
| Fingel to Fredd-italia Int'l | 115 |
| Frederick's Dairies to Freshbake Foods | 116 |
| Friand to Frinalco | 117 |
| Frosta to Fruttadoro | 118 |
| Fruttadoro to Fullers Food | 119 |

| | |
|------------------------------------|-----|
| G7 to General Mills | 120 |
| General Mills to Gilde Equity | 121 |
| Gilde Equity to Grace-Kennedy | 122 |
| Grander-oble to Greenleaf | 123 |
| Groupe Le Duff to Hain Celestial | 124 |
| Halieutis to Heinz | 125 |
| Heinz to Hesbaye Frost | 126 |
| Hicks Muse to Ibense Bornay | 127 |
| Iberfresco to IJspaleis | 128 |
| IJspaleis to Interaliment | 129 |
| Intersea-fish to KCP | 130 |
| Keba to Koopmans | 131 |
| Koopmans to Lacrem | 132 |
| Laflam to Lero Foods | 133 |
| Lero Foods to Lion Capital | 134 |
| LM Salaisons to Mackies | 135 |
| Maheso Gedesco to Mantua Surgelati | 136 |
| Marbrone to Martini Alimentare | 137 |
| Maitre Pierre to McKey Foods | 138 |
| Meatpoint to Mitsubishi | 139 |
| Mocambo Surgelati to Nautilus Food | 140 |
| Nestlé | 141 |
| Neuhaus to Northern Foods | 142 |
| Northern Foods to Oetker | 143 |
| Oetker to Orkla | 144 |
| Orkla to Pani-Route | 145 |
| Parmalat to Penguin | 146 |
| PepsiCo to Permira | 147 |
| Permira to Pescanova | 148 |
| Pescanova to Pierre Schmidt | 149 |
| Pinguin to Pizzoli | 150 |
| Pizzoli to Ponthier | 151 |
| Premier Foods to Profood | 152 |
| Proval to Ravifruit | 153 |
| Readybuy to Rolli | 154 |
| Rolli to Sammon-tana | 155 |
| Sammon-tana to Schne-Frost | 156 |
| Sco-Fro to Sill | 157 |
| Silver Pail to Socopa Viandes | 158 |
| Sodiaal to Sopaf | 159 |
| Sopaf to Stute | 160 |
| Sun to Südzucker | 161 |
| Südzucker to Terrena | 162 |
| Thayer to Ton Puts | 163 |
| Tonito to Tutti Pasta | 164 |
| Unichips Int'l to Valpo | 165 |

| | |
|--|------------|
| Van Diermen to Vion | 166 |
| Vion to Wessanen | 167 |
| Wessanen to Yeo Organic | 168 |
| Yorkshire Dales to Zamek | 169 |
| Major Brands And 'Who Owns Whom' | 171 |
| Holding Companies, Key Local Subsidiaries and Major Brands systematically identified by product and country | |
| Major Brands by Product Market | 173 |
| 1.6 Frozen Pastry Products | 173 |
| 6.3 Frozen Fruit | 175 |
| 6.6 Frozen Vegetables | 176 |
| 7.3 Frozen Potato | 179 |
| 9.1 Ice Cream | 181 |
| 12.3 Frozen Soup | 186 |
| 13.22 Frozen Convenience meat | 187 |
| 14.3 Frozen Fish | 189 |
| 15.4 Frozen Pizza | 192 |
| 15.5 Frozen Ready Meals | 195 |
| Major Brands by Holding Company | 201 |
| 11er Nahrungsmittel to Anglo-Dutch Meats | 201 |
| Antárdida to Associated British Foods | 202 |
| Atlantique Alimentaire to Bofrost | 203 |
| Bofrost to Campbell Soup | 204 |
| Campbell Soup to ConAgra | 205 |
| ConAgra to Cosun | 206 |
| Cosun to Domstein | 207 |
| Domstein to Farm Frites | 208 |
| Farm Frites to Frosta | 209 |
| Frosta to German Equity Partners | 210 |
| German Equity Partners to Heinz | 211 |
| Heinz to IJspaleis | 212 |
| IJspaleis to LDC | 213 |
| LDC to Maheso Gedesco | 214 |
| Maheso Gedesco to McCain | 215 |
| McCain to Mitsubishi | 216 |
| Mocambo Surgelati to Nestlé | 217 |
| Nestlé to Northern Foods | 218 |
| Northern Foods to Oetker | 219 |
| Oetker to Permira | 220 |
| Permira to Pescanova | 221 |
| Pescanova to Primel | 222 |
| Princiani to Saponi Antichi | 223 |
| Sara Lee to Sopralax | 224 |
| Sprehe to transGourmet | 225 |
| transGourmet to Unilever | 226 |

Unilever to Wulf-Frost
Yeo Valley Organic to Zamek

227
228