

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

The Fresh And Processed Meat 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 FRESH AND PROCESSED MEAT MARKET IN MAJOR 7 WEST EUROPEAN COUNTRIES

TABLE OF CONTENTS

Summary Market Tables	19
2005 Total Expenditure	19
Belgium/Lux to United Kingdom and 7-Country Total	19
2010 Total Expenditure	20
Belgium/Lux to United Kingdom and 7-Country Total	20
2010 Retail Expenditure	21
Belgium/Lux to United Kingdom and 7-Country Total	21
2010 Foodservice Expenditure	22
Belgium/Lux to United Kingdom and 7-Country Total	22
2005-2010 Value Growth Rates	23
Belgium/Lux to United Kingdom and 7-Country Total	23
2005-2010 Per Capita Growth Rates	24
Belgium/Lux to United Kingdom and 7-Country Total	24
2010 Retail Market Share	25
Belgium/Lux to United Kingdom and 7-Country Total	25
2010 Foodservice Market Share	26
Belgium/Lux to United Kingdom and 7-Country Total	26
2010 Total Retail Market Share	27
Belgium/Lux to United Kingdom and 7-Country Total	27
2010 Total Foodservice Market Share	28
Belgium/Lux to United Kingdom and 7-Country Total	28
Demand and Supply by Product	29
13. All Fresh & Processed Meat Market Profile	30
Total Market by Volume, All Fresh & Processed Meat	30
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, All Fresh & Processed Meat	31
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, All Fresh & Processed Meat	32

Total Demand by Country and Region, '000 tons, 2010	32
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, All Fresh & Processed Meat	33
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, All Fresh & Processed Meat	34
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	34
13.1 All Fresh Meat Market Profile	36
Total Market by Volume, All Fresh Meat	36
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, All Fresh Meat	37
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, All Fresh Meat	38
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	38
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, All Fresh Meat	39
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, All Fresh Meat	40
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	40
13.11 Beef Market Profile	42
Total Market by Volume, Beef	42
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, Beef	43
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, Beef	44
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	44
Retail And Foodservice Market by Value, Beef	45
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, Beef	46
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	46
13.12 Pork Market Profile	48
Total Market by Volume, Pork	48
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, Pork	49
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, Pork	50
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	50
Retail And Foodservice Market by Value, Pork	51
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, Pork	52
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	52
13.13 Mutton Market Profile	54
Total Market by Volume, Mutton	54
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, Mutton	55
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, Mutton	56
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, Mutton	57

Total Demand by Country and Region, Euro millions, 2010	57
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, Mutton	58
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	58
13.14 Poultry Market Profile	60
Total Market by Volume, Poultry	60
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, Poultry	61
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, Poultry	62
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, Poultry	63
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	63
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, Poultry	64
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	64
13.15 Other Fresh Meat Market Profile	66
Total Market by Volume, Other Fresh Meat	66
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, Other Fresh Meat	67
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, Other Fresh Meat	68
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 Value, 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, Other Fresh Meat	69
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	69
Company Market Shares, Other Fresh Meat	70
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	70
13.2 All Processed Meat Market Profile	72
Total Market by Volume, All Processed Meat	72
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, All Processed Meat	73
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, All Processed Meat	74
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, All Processed Meat	75
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	75
Company Market Shares, All Processed Meat	76
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	76
13.21 Canned Meat Market Profile	78
Total Market by Volume, Canned Meat	78
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, Canned Meat	79
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, Canned Meat	80
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, Canned Meat	81
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, Canned Meat	82

Up to 13 Holding Company Market Shares by Country and Region (updated monthly)	82
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	82
13.22 Frozen Convenience meat Market Profile	84
Total Market by Volume, Frozen Convenience meat	84
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	85
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	86
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	87
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 Convenience meat	88
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)	88
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	88
13.23 Cured Meat Market Profile	90
Total Market by Volume, Cured Meat	90
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, Cured Meat	91
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, Cured Meat	92
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, Cured Meat	93
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, Cured Meat	94
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)	94
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	94
13.24 Bacon & Ham Market Profile	96
Total Market by Volume, Bacon & Ham	96
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, Bacon & Ham	97
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, Bacon & Ham	98
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, Bacon & Ham	99
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, Bacon & Ham	100
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	100
Belgium/Lux to United Kingdom and 7-Country Total	100
13.25 Delicatessen Products Market Profile	102
Total Market by Volume, Delicatessen Products	102
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, Delicatessen Products	103
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, Delicatessen Products	104
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, Delicatessen Products	105
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, Delicatessen Products	106
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	106

Company Profiles	107
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	
AAK to Adrihold	108
Adrihold to Agropec. Guissona	109
Agropec. Guissona to AIA	110
Alberti to Anca Lega	111
Andreu Gourmet to Arena Holding	112
Arena Holding to Argal	113
Argal to Autruche Production	114
AVA to Avícola Sanchez	115
Baarssen to Baugur	116
Beck to Bernard Matthews	117
Bernard Matthews to Bertolini	118
Bignami to Bonduelle	119
Bonduelle to Bovleco	120
Bovleco to Brunet	121
Bréchoire to CAI	122
CAI to Campofrío Foods	123
Campofrío Foods to Cargill	124
Cargill to Carnia	125
Carnia to Casa-demont	126
Casa-demont to CCA	127
CCA to Central de Carnes	128
Central de Carnes to Clayton Love	129
CMLC to ConAgra	130
ConAgra to Coop du Périgord	131
Coop Pays Loire to Cooperl	132
Copaim to Coren	133
Coren to Coveco	134
Cranswick to Cremonini	135
Cremonini to D&S	136
D'Argifral to Danish Crown	137
Danone to Delmote	138
Denali to Doux	139
Doux to Détry	140
Détry to Edeka	141
Edeka to Eichkamp	142
El Encinar to Emil Färber	143
Equinox to Even	144
Even to Fausto San José	145
Felsineo to Fleury Michon	146
Fleury Michon to France Autruches	147

Franzin to Fribín	148
Fribín to Garcia Baquero	149
Gausepohl Fleisch to Giresa	150
Giresa to Gourmet Bacon	151
Graham White to Grega	152
Gres-singham to Grupo Fuertes	153
Grupo Fuertes to Gruppo Labata	154
Gutshof to Hap Foods	155
Harrisons Poultry to Heristo	156
Heristo to Hinton Poultry	157
HKScan to Hénaff	158
Höhenrainer to IFP	159
IFP to ITM	160
ITM to Jean Laurent	161
Jean Prévot to Kalnik	162
Kalnik to Kerry Group	163
Kerry Group to Krill	164
Kupfer to La Protectora	165
Lactalis to LDC	166
Le Bocage to LM Salaisons	167
LM Salaisons to Lukullus	168
Lukullus to Löblein	169
Löblein to Maredo	170
Marfrig to Martini Alimentare	171
Martini Alimentare to Maisadour	172
Maisadour to Meadow Vale	173
Meatpoint to Meica Ammerl.	174
Meica Ammerl. to Midland Cattle	175
Minmar to Moroni	176
Mortier to Murgaca	177
Mère Lalie to Nitsch	178
Nitsch to Northern Foods	179
Northern Foods to Nutreco	180
Nutrexpa to Nölke	181
Nölke to Osona	182
Osona to Paramo Cotecsa	183
Paramo Cotecsa to Permira	184
Persoon to PHW Gruppe	185
PHW Gruppe to Pomona	186
Ponnath to Proinserga	187
Proinserga to Randall Parker	188
Randall Parker to Roca	189
Roca to Sal. de l'Ardèche	190
Sala to Salumificio Panini	191
Samworth Brothers to Saxby Bros	192
Sayers to Segovia	193

Sepp's to Socopa Viandes	194
Socopa Viandes to Sovico	195
Sprehe to Steinhaus	196
Steinhaus to Swan	197
Synavi to Teeuwissen	198
Tempe & Fils to Terrena	199
Terrena to TFF	200
Theo Bauwens to TMF Gruppe	201
TMI Foods to Ulster Farmers	202
Ulster Farmers to Unilever	203
Unilever to Uniq	204
United Group to Vall Companys	205
Vallespluga to Van Landschoot	206
Van Landschoot to Veronesi	207
Veroni to Villani	208
Vion	209
Viscofan to Waitrose	210
WaSta to West-fleisch	211
West-fleisch to Weyl Beef	212
Whitchurch to Woodhead Bros	213
Woodhead Bros to Zubia	214

Major Brands And 'Who Owns Whom' 215

Holding Companies, Key Local Subsidiaries and Major Brands systematically identified by product and country	
Major Brands by Product Market	217
13.11 Beef	217
13.12 Pork	219
13.13 Mutton	221
13.14 Poultry	223
13.15 Other Fresh Meat	225
13.21 Canned Meat	227
13.22 Frozen Convenience meat	228
13.23 Cured Meat	231
13.24 Bacon & Ham	235
13.25 Delicatessen Products	239
Major Brands by Holding Company	243
AarhusKarlshamn to Arena Holding	243
Arena Holding to Beretta	244
Beretta to Bovleco	245
Bovleco to Campofrío Foods	246
Campofrío Foods to Cebeco	247
Cebeco to Consorzio Carni Bovine Garantite	248
Coop AN to Coveco	249
Cranswick to Danone	250
Danoscan to Ehlers	251

Ehlers to Fleury Michon	252
Fleury Michon to Grand Saloir St Nicolas	253
Grandi Salumifici Italiani to Heristo	254
Heristo to J.F.Ibérica de Avestruces	255
Jabusur to Lactalis	256
Lactalis to Mainfrost	257
Mantua Surgelati to Meatpoint	258
Meatpoint to Nestlé	259
Nestlé to Nutrexpa	260
Nutrexpa to Peter zur Mühlen	261
Peter zur Mühlen to Rovagnati	262
Rovagnati to Socopa Viandes	263
Socopa Viandes to Ter Beke	264
Ter Beke to Unilever	265
Unilever to Verenigde Slachtpluimvee Export	266
Verneuil Finances to Vitelco	267
Vivandy to Zuckerraffinerie Tangermünde	268

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