

Inside
Your free taster

NEW EDITION

The **Big Food** **Guide** 2011

The Essential Reference



- **Data**
- **Trends**
- **Market Sizes**
- **Forecasts to 2011**
- **Growth Opportunities**

The Big Food Guide 2011

Today's food markets are becoming increasingly complex and competitive. Changing lifestyles, more sophisticated tastes, greater affluence, new demographic trends, consolidations in the industry, the growing power of the retailer and concerns over food safety are some of the major challenges confronting the industry.

Within this market there are significant opportunities for profitable growth, but one of the requirements for success is up-to-date market information and analysis. This important new market report, gives you the analysis, data and forecasts in one essential reference work - **The Big Food Guide 2011**.



What is The Big Food Guide?

The Big Food Guide is our 'Wisdom of the Industry', an easy-to-use directory of market information covering more than 90 products in 15 Western European countries.

Clearly presented

Section by section each market is drilled down in detail, giving you an understanding of your market and where it is heading.

Key markets and growth opportunities are clearly presented and volume and value forecasts to 2011 aid strategic planning.

In short, **The Big Food Guide 2011** is the essential reference!

Competitively priced

Competitively priced, **The Big Food Guide** is not only the definitive reference but it is also a "must-have" for every company library. Order your copy today! Call +44 (0)1902 422282.

Essential for your business

Forward-looking food companies use the Big Food Guide for strategic information on markets and opportunities, whilst suppliers of **ingredients** and **packaging** can gain a total view of all the markets they supply.

The Big Food Guide also provides essential data for internal discussion, sales presentations and marketing plans.

The Essential Reference

- Invaluable for new product development
- Improve profitability and aid strategic planning
- Market prospects and forecasts to 2011
- Growth markets and opportunities
- Volume and value data
- Focused on added-value markets
- Packed with charts, graphs and tables

Who are we?

RTS Resource are a leading independent food market research company. Established in 1987, we help companies grow and develop their business through the application of information. For more information please visit our website:

www.rts-resource.com

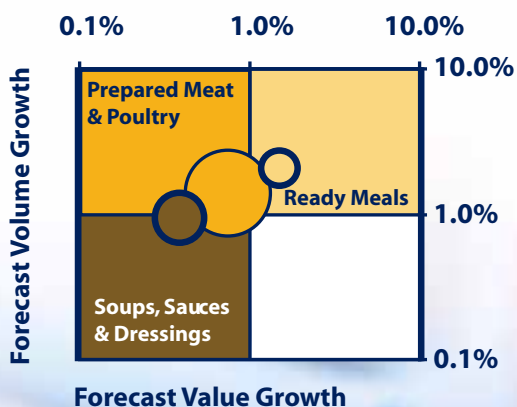
A total market perspective

Ready Meals

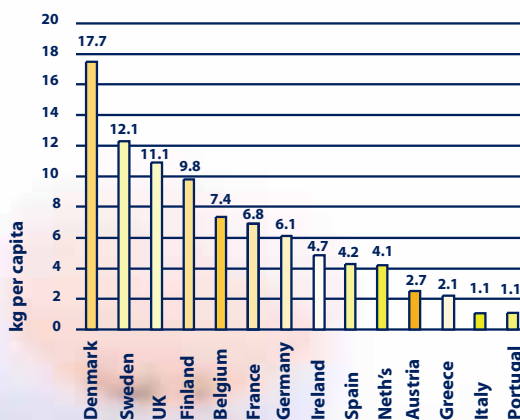
- The total Western European market for Ready Meals was worth €12.6bn in 2006.
- The market for Ready Meals is forecast to grow at a faster rate than the segments of Prepared Meat & Poultry and Soups, Sauces & Dressings.
- Denmark has the highest per capita consumption of Ready Meals at 17.7kg per person per annum in 2006.

Expenditure on Ready Meals is forecast to reach €13.7bn by 2011

Market Outlook 2011



Per Capita Consumption 2006



Data taken from The Big Food Guide 2011. Order your copy today! Call our sales line on +44 (0)1902 422282 or complete the order form.



Detailed country analysis

Prepared Meat & Poultry

Sandwiches is forecast to drive value growth by an additional €120m

- Expenditure on burgers in the Netherlands accounted for €673m in 2006.
- 93,000 tonnes of sausages were consumed in the Netherlands in 2006.
- Sandwiches is predicted to drive growth, with expenditure forecast to grow from €424m in 2006 to €544m by 2011.

Volume Consumption, 2001 to 2011

000 tonnes	2001	2006p	2011f	CAGR 2006-2011
Sausages	94	93	95	0.3%
Burgers & Other Comminuted	84	82	84	0.3%
Bacon & Ham	57	57	58	0.4%
Prepared Poultry	38	42	44	1.0%
Other Meats	21	21	22	0.6%
Canned Meats	47	46	45	- 0.3%
Pizzas	9	9	10	0.9%
Other Snacks & Pastry	13	13	14	0.7%
Sandwiches	29	53	65	4.2%
Vegetarian	4	5	6	3.1%
Total	394	422	442	0.9%

Value Expenditure, 2006 to 2011

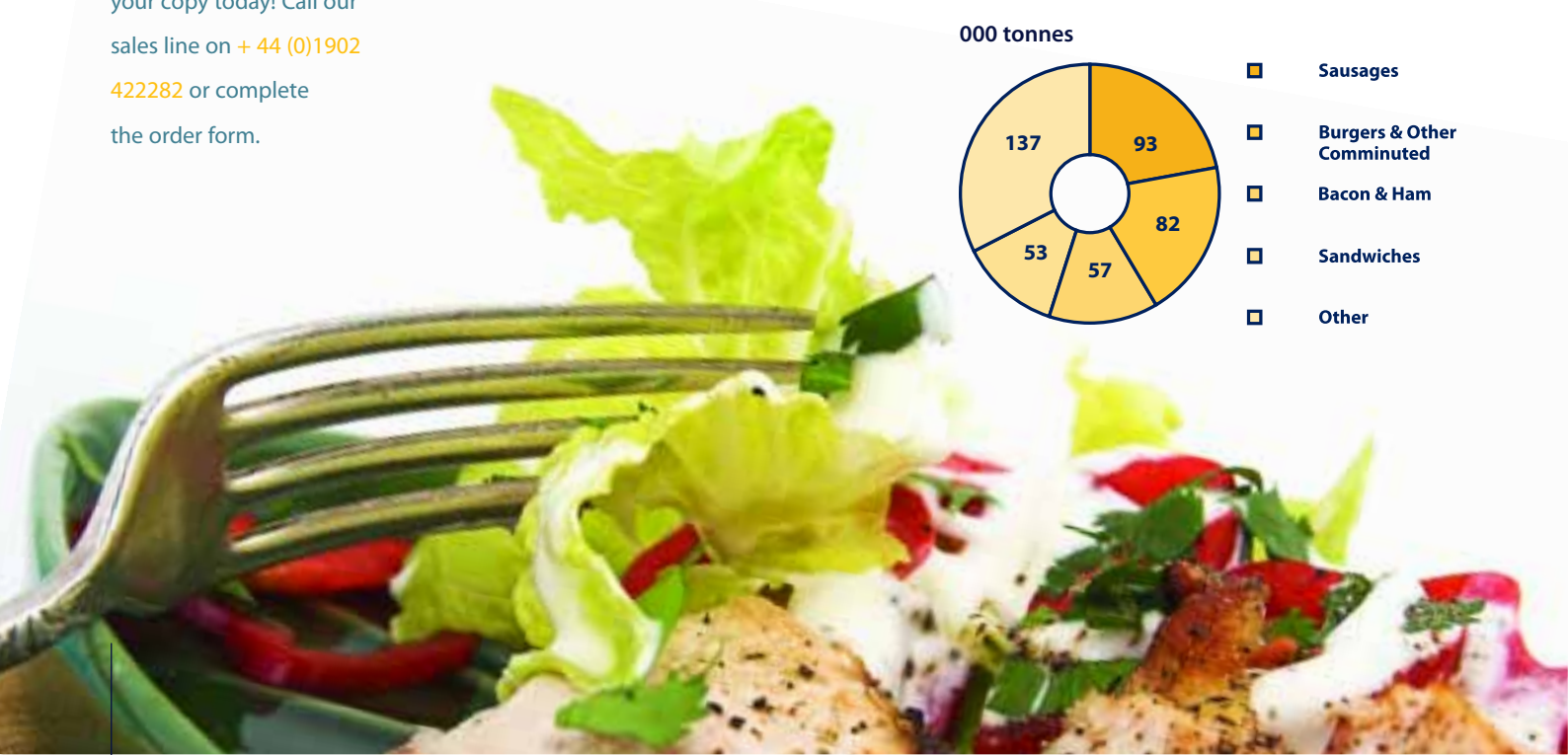
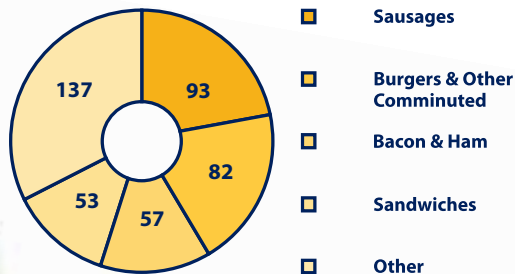
€m	2006p	2011f	CAGR 2006-2011
Sausages	€478	€501	1.0%
Burgers & Other Comminuted	€673	€688	0.4%
Bacon & Ham	€382	€396	0.7%
Prepared Poultry	€283	€297	0.9%
Other Meats	€172	€180	1.0%
Canned Meats	€254	€252	- 0.2%
Pizzas	€44	€48	1.5%
Other Snacks & Pastry	€96	€105	1.9%
Sandwiches	€424	€544	5.1%
Vegetarian	€37	€44	3.9%
Total	€2,842	€3,055	1.5%



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Share of Volume Consumption 2006

000 tonnes



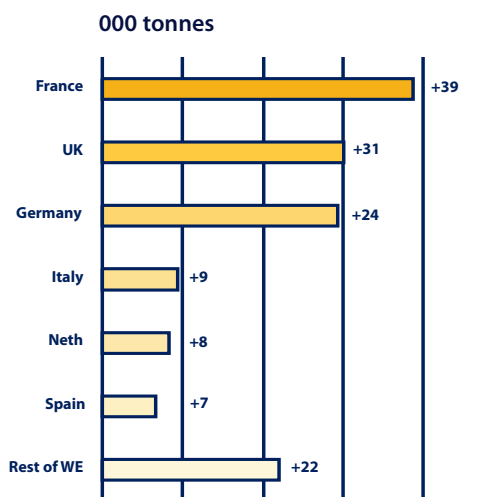
Growth opportunities

Yogurt, Desserts & Ice Cream

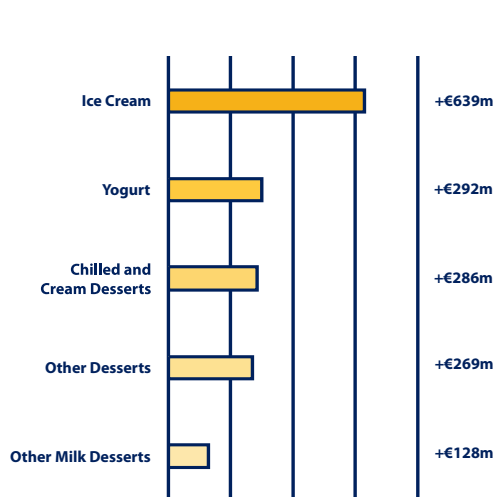
- The Western European market for Ice Cream represents a €639m growth opportunity.
- Volume consumption of Yogurts, Desserts & Ice Cream is forecast to grow by an additional 39,000 tonnes in France between 2006 and 2011, followed closely by the UK (+31,000 tonnes) and Germany (+24,000 tonnes).

Ice Cream in Italy represents a €142m opportunity

Forecast Additional Growth in Volume Consumption, 2006 to 2011

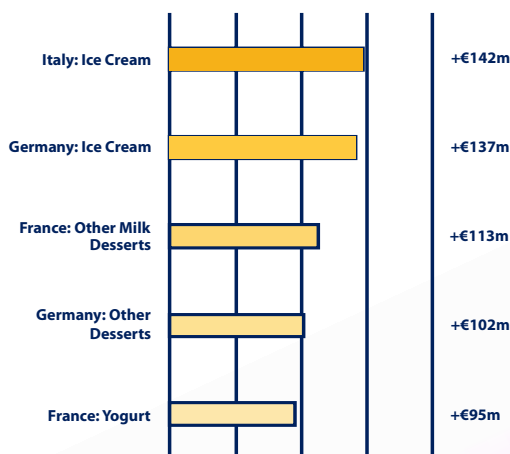


Forecast Additional Growth in Value Expenditure, 2006 to 2011



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Key Growth Markets, 2006 to 2011



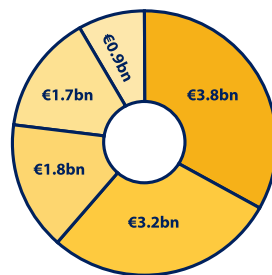
Shape of the market 2011

Snacks

The UK leads the way in Snacks consumption, with volume forecast to reach 448,000 tonnes by 2011

- UK consumption of all Snacks is forecast to reach 448,000 tonnes by 2011.
- Expenditure on potato crisps in Western Europe is forecast to reach €3.8bn by 2011.

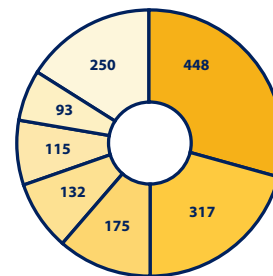
Forecast Expenditure on Snacks 2011



- Potato Crisps
- Extruded and Other Snacks
- Nuts
- Baked Snacks
- Pot Snacks

Forecast Consumption of Snacks 2011

000 tonnes



- UK
- Germany
- France
- Spain
- Neth
- Italy
- Rest of WE



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€bn	2011f
Potato Crisps	€3.8bn
Extruded Snacks	€2.9bn
Nuts	€1.8bn
Baked & Other Snacks	€1.5bn
Pot Snacks	€0.8bn

000 tonnes	2011f
UK	448
Germany	317
France	175
Spain	132
The Netherlands	115
Italy	98
Rest of WE	250



Total market coverage



Prepared Meat & Poultry

- Sausages • Burgers • Bacon & Ham • Prepared Poultry
- Other Meats • Canned Meats • Pizzas
- Other Snacks & Pastry • Sandwiches • Vegetarian

Ready Meals

- Chilled Meals • Frozen Meals • Canned & Ambient Meals
- Dry Meals

Soups, Sauces & Dressings

- Fresh & Chilled Soup • Canned Soup
- Cube & Packet Soup • Instant Soup • Bouillon / Similar
- Condiment Sauces • Sauces for Pasta • Cooking Sauces
- Dry Sauces Mixes • Salad Dressings
- Condiments, Pickles & Relishes • Herbs & Spices
- Culinary Fats & Oils

Snacks

- Potato Crisps • Extruded & Other Snacks • Baked Snacks
- Nuts • Pot Snacks

Confectionery

- Tablets & Unfilled Chocolate • Filled Tablets & Bars
- Pralines & Other Sweets • Other Chocolate Confectionery
- Chewing Gum • Boiled Sugar Sweets
- Toffees, Caramels & Chews • Gums, Jellies, Pastilles
- Other Sweets (Inc. Medicated)

Biscuits, Cakes & Pastries

- Biscuits • Cakes & Pastries

Breakfast Cereals & Bars

- Breakfast Cereals • Cereal & Health Bars

Yogurt, Desserts, Ice Cream

- Yogurts & Similar • Chilled & Cream Desserts
- Other Milk Desserts • Other Desserts
- Ice Cream

Fruit & Vegetables

- Fresh Fruit • Canned Fruit • Dried Fruit
- Fresh Vegetables • Fresh Potatoes
- Frozen Potato Products • Canned Vegetables
- Frozen Vegetables & Fruit • Pulses & Beans
- Jams & Preserves • Sugar (Sucrose)
- Honey • Intense Sweeteners • Eggs

Fish & Seafood

Bread & Morning Goods

Dairy

- White Milk • Milk Drinks • Butter • Margarine
- Bread Spreads • Cheese • Cream • Condensed Milk

Carcase Meat

- Pigmeat • Beef & Veal • Poultry • Sheepmeat
- Frozen Meats • Frozen Poultry • Offal

Flour, Pasta & Rice

Bonus Sections

* Convenience Foods

* Chilled Foods

* Frozen Foods

Products

The Big Food Guide 2011

Questions & Answers

The Essential Reference

What are the opportunities in Ready Meals ?

How much will the Snacks market grow ?

How can I maximise product potential ?

What is my share of the Ice Cream market ?

Why should I order this report?

- Save time, money and effort when researching new markets.
- Improve NPD success and exploit new business opportunities.
- Self-consistent source of data for presentations, proposals and reports.

What markets are covered?

Over 90 products with a focus on convenience foods including:

- Pizzas
- Sandwiches
- Ready Meals
- Snacks
- Confectionery
- Cereal Bars
- Ice Cream
- Sauces
- Soups
- Plus many more...

When should I use it?

- Sales presentations
- New product development
- Strategic planning
- Board meetings
- Marketing plans
- Management reference

What is included?

- Market forecasts to 2011
- Demographics
- Volume consumption
- Value expenditure
- Key growth markets
- Per capita consumption
- Consumer analysis
- Market commentary
- Trends

Who should buy it?

The Big Food Guide is essential for anyone with an interest in the European food market including:

- Food manufacturers
- Ingredient suppliers
- Packaging suppliers

Who are RTS?

• RTS are a leading food market research company and have been writing reports for the food industry since 1987.

- For more information please visit our website www.rts-resource.com



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