

Research example

Frozen Food: Aldi Market Share/Germany

Research done in May 2012

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Question: Aldi market share in frozen food category in Germany

Sources used: LexisNexis German/English sources

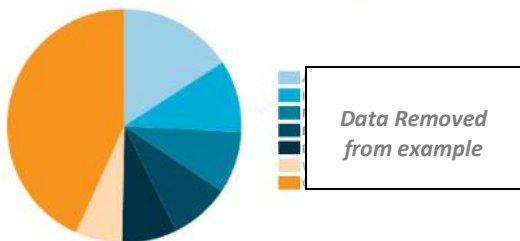
Budget needed: 1,5 hours = 142,50 € / articles about 60,- € (both excl. VAT)

Frozen Processed Food in Germany2

Company Shares (by National Brand Owner) Frozen Processed Food - Germany - Retail Value RSP - % 20103

Company Shares (by National Brand Owner) Frozen Processed Food - Germany - Retail Value RSP - % 2010

Company Shares (by National Brand Owner) Frozen Processed Food - Germany - Retail Value RSP - % 2010



Source: Passport by Euromonitor International

Tauwetter in der Eistruhe4

The discounter last year sold nearly 10 percent less frozen food. The result: Aldi's share of the turnover of retail trade in this product category was only 15 percent (last year more than 17 percent).4

TK-Branche zeigt gemischte Gefühle;5

Aldi comes to around 16 percent and the remaining discounter add to 29 percent of the frozen food sales. 5

Lidl sahnt mit Samstags-Aktionen ab;5

Aldi lost double digits and fell below 16 percent of industry sales. The situation is similar in 2011.5

REMARKS ABOUT RESULTS

1. the client receives the original articles (in German)
2. the relevant segments/ information used for summary/translation are highlighted (yellow) in the text below
3. For clients who don't speak German: translation done with Google translator, edited to preserve original contents/ information of articles (Google translator gets it totally wrong sometimes). The text is not edited to be used directly in documents / presentations to save time and \$\$\$\$. The text below shows this (highlighted in green).
4. copyright prevents us from including the original articles in this research example

Euromonitor International Sector Capsules

December 2011

Frozen Processed Food in Germany

- In 2010, the market for frozen processed food in Germany was valued at 6,000 million EUR, representing 21% of total processed food sales.
- The market is expected to grow at 3% over the forecast period.
- The market is dominated by the leading brands, which account for 80% of sales.
- The market is highly competitive, with many players.
- The market is expected to continue to grow, driven by increasing demand for convenience and variety.
- The market is expected to be highly fragmented, with many small players.

Market Size Frozen Processed Food - Germany 2006 - 2011

Market Size Frozen Processed Food - Germany 2006 - 2011



Source: Passport by Euromonitor International

Competitive Landscape

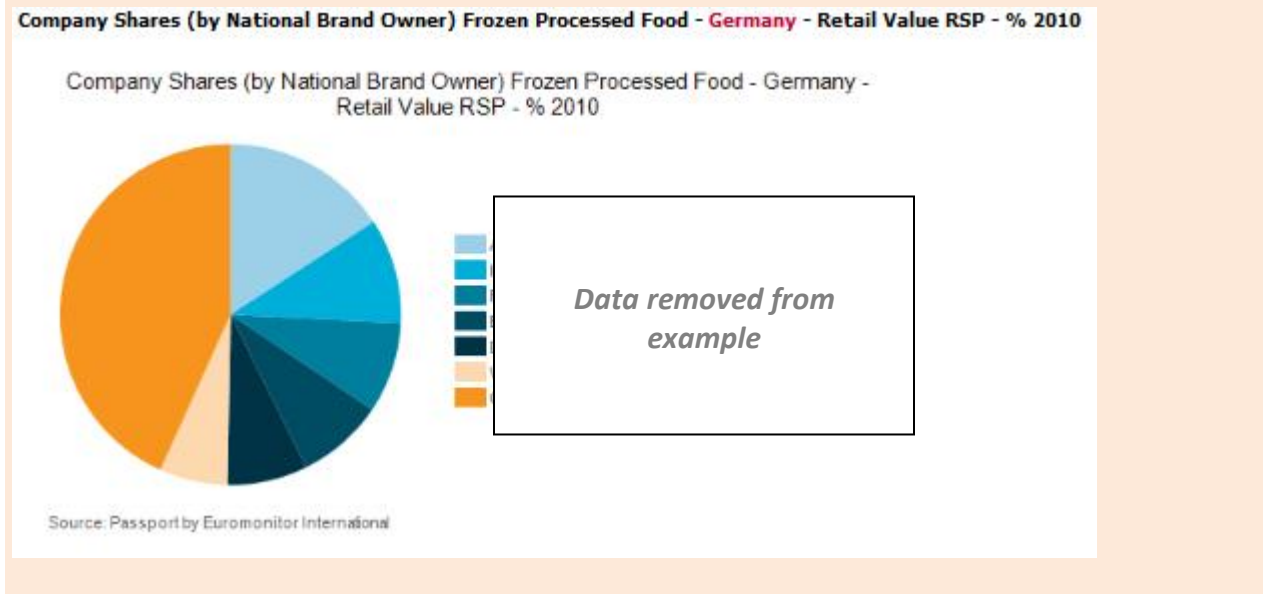
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frozen processed meat and poultry, all of which have profited from its presence.

Company Shares (by National Brand Owner) Frozen Processed Food - Germany - Retail Value RSP - % 2010



National Brand Owners and Their Brands

Company Name (NBO)	Brand (GBO)
Al	
Ap	mbH & Co KG)
Ap	mbH & Co KG)
Ba	H)
Bc	s GmbH & Co KG)
Co	rath & Wiese GmbH & Co
KG	KG)
...	

Definitions and Methodology
Frozen Processed Food

This is the aggregation of frozen processed red meat, processed poultry, processed fish/seafood, processed vegetables, meat substitutes, processed potatoes, bakery products, desserts, ready meals, pizza, soup, noodles and other **frozen food**. Note: All packaged products, including branded, private label as well as generic products are included. Generic frozen processed food products typically come in a plastic tray, covered with cellophane/clear wrapping. Such products usually only come with a price tag with the name of the retailer and/or manufacturer on the packaging.

Methodology

This report is derived from Euromonitor International's Passport information system. Industry research is carried out by a global team of more than 600 in-country analysts and is based on a core set of research techniques:

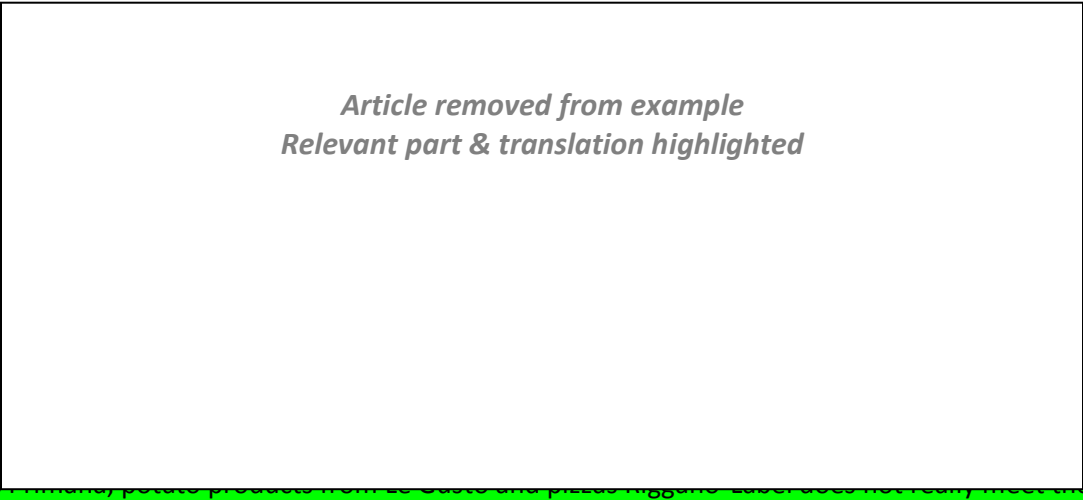
- National-level desk research, company research and analysis, store checking, trade interviewing with national players and market analysis
- International-level desk research, multinational company research and analysis, trade interviewing with international players and market analysis

Lebensmittel Zeitung
2. September 2011

Tauwetter in der Eistruhe

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Lebensmittel Zeitung
10. Juni 2011

TK-Branche zeigt gemischte Gefühle;

Energybilanz und höherer Konsum lassen Hersteller aufatmen - Doch in den Truhen des Handels herrscht gnadenlose Verdrängung

...

Wie berichtet, beeinflussen die Daueraktionen des Discounters Lidl seit September 2010 maßgeblich das Geschehen auch in der Vollpreisbranche. Die Umsatzzuwächse sind mittlerweile auf 5 Prozent gesunken.

As reported, the long-term actions of the discount retailer Lidl since September 2010 have significantly influenced the food sector as well. Sales growth in the full-price sector has fallen to 5 percent.

Home services reached, according to Nielsen market research now not even 9 per cent in value and in volume even less than 5 percent.

Lebensmittel Zeitung
3. Juni 2011

Lidl sahnt mit Samstags-Aktionen ab;

Billig-Angebote beschern dem Discounter erhebliche Zuwächse - Nicht nur Aldi hat das Nachsehen

...

Einen Erdrutsch erlebt das Geschäft in den Tiefkühltruhen des deutschen Handels. Dieser Markt, der 2010 neu sackte, ist nun wieder im Aufwind. Die Umsatzzuwächse von Aldi und Lidl sind im Juni 2011 auf 10, total 11 Prozent gestiegen.

The frozen food market in Germany is experiencing a landslide. This market, which collapsed in 2010, is now on the rise. Sales growth for Aldi and Lidl in June 2011 reached 10, total 11 percent.

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