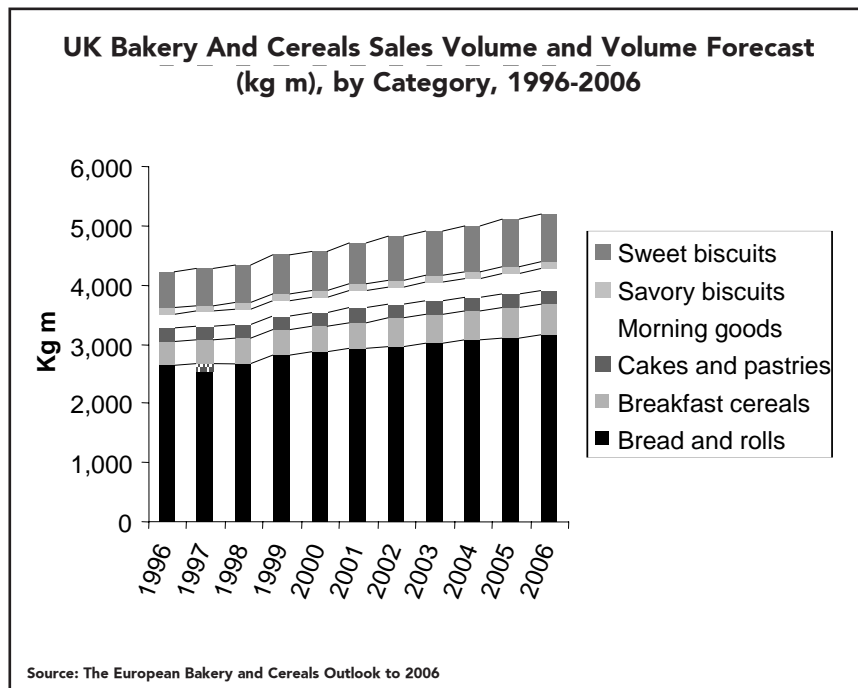


The European Bakery and Cereals Outlook to 2006



- What will be the fastest growing bakery and cereal sectors over the next three years?
- How are different sectors of the market performing?
- Which are the leading bakery and cereals companies in each sector of the market?
- What are the regional differences in consumption between countries?
- Which are the most important distribution channels for bakery and cereals?

This report provides the answers to all these questions and more...

The European Bakery and Cereals Outlook to 2006

Italy Bakery And Cereals Sales Volume Forecast (kg m), by Category, 2002-2006

| Category | 2002 | 2003 | 2004 | 2005 | 2006 |
|--------------------|----------------|----------------|----------------|----------------|----------------|
| Bread and rolls | 4,809.6 | 4,939.9 | 5,070.2 | 5,200.4 | 5,330.7 |
| Breakfast cereals | 22.3 | 23.5 | 24.7 | 25.8 | 27.0 |
| Cakes and pastries | 101.0 | 104.4 | 107.7 | 111.1 | 114.5 |
| Morning goods | 163.9 | 169.3 | 174.7 | 180.1 | 185.9 |
| Savoury biscuits | 63.0 | 63.5 | 63.9 | 64.3 | 64.8 |
| Sweet biscuits | 420.1 | 429.9 | 439.7 | 449.6 | 459.4 |
| Overall | 5,579.9 | 5,730.5 | 5,880.9 | 6,031.3 | 6,182.3 |

Source: The European Bakery and Cereals Outlook to 2006

"The combined market for bakery and cereal products across the five major countries will reach \$62.58 billion by 2006, with the UK fast-catching Germany's position as the largest market in Europe..."

Source: The European Bakery and Cereals Outlook to 2006

This report will enable you to identify the most profitable market sectors and develop killer strategies for effective distribution in the European bakery and cereals markets.

The report contains detailed analysis of the major categories of the bakery and cereals Industry: **Bread and Rolls, Breakfast Cereals, Cakes and Pastries, Morning Goods, Savoury Biscuits and Sweet Biscuits.** Detailed market sector data is provided on the leading three sectors in each individual country.

The European Bakery and Cereals Outlook to 2006 contains easily comparable data on the market value, volume, distribution, market share, expenditure and consumption for each category, plus full five-year market forecasts for UK, Germany, Spain, France and Italy.

Furthermore this report examines future problems, innovations and potential growth areas within the European bakery and cereals markets and identifies the key strategies needed for your company's success.

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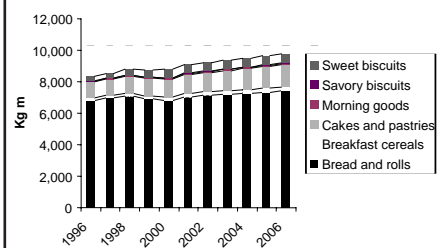
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Germany Bakery And Cereals Sales Volume and Volume Forecast (kg m), by Category, 1996-2006



Source: The European Bakery and Cereals Outlook to 2006

"Although sector leaders, Bahlsen, account for around one-fifth of the sweet biscuit revenues, smaller producers are more characteristic of the sector. Producers grouped in the 'other' and private label headings account for over 60% of sales..."

Source: The European Bakery and Cereals Outlook to 2006

The **European Bakery and Cereals Outlook to 2006** is based upon unique market research and analysis, providing you with a single source of market data, forecasts and trend assessments. The report includes:

- **Value and volume breakdowns** of sub-sector performances from 1996.
- **Analysis of leading retail channels** including forecourt retailers and kiosks.
- **Company analysis and market share at sector level** for each of the major European categories, including Barilla, McVitie's and Kellogg's
- **Detailed market forecasts to 2006** across all bakery and cereal categories.
- **An examination of the key trends** which are currently affecting the market major bakery and cereal manufacturers and how these and future trends will affect the market over the next three years.
- **A comprehensive market summary** pooling the most valuable information and analysis for the major European markets

The Value proposition

Spain Sweet Biscuits Sales Value Forecast (US\$ m), by Segment, 2002-2006

| Segment | 2002 | 2003 | 2004 | 2005 | 2006 |
|-----------------|--------------|--------------|--------------|--------------|--------------|
| Artisanal | 15.8 | 16.2 | 16.5 | 16.8 | 17.0 |
| Assortments | 31.7 | 33.2 | 34.7 | 36.3 | 37.8 |
| Butter-based | 54.1 | 56.0 | 58.0 | 59.9 | 61.8 |
| Chocolate | 25.3 | 27.0 | 28.7 | 30.4 | 32.2 |
| Cookies | 34.3 | 36.0 | 37.7 | 39.4 | 41.1 |
| Wafer | 29.0 | 30.2 | 31.4 | 32.5 | 33.7 |
| In-store bakery | 10.9 | 11.4 | 11.8 | 12.3 | 12.7 |
| Cream filled | 64.8 | 67.2 | 69.6 | 72.0 | 74.3 |
| Plain | 240.2 | 251.8 | 263.5 | 275.3 | 287.1 |
| Egg-based | 53.6 | 56.1 | 58.6 | 61.1 | 63.6 |
| Overall | 559.9 | 585.2 | 610.6 | 635.9 | 661.3 |

Source: The European Bakery and Cereals Outlook to 2006

"The Spanish morning goods market has grown to reach a current value of \$345.6 million. Whilst the increase in market value is set to continue the rate of this increase will continue its decline. In 2006 the market is forecast to reach a value of \$424.4 million..."

Source: The European Bakery and Cereals Outlook to 2006

Benefit from over 100 pages of expert insight and analysis, enabling you to:

- **Identify the most profitable market segments** - using the report's detailed historical market data and exclusive forecasts
- **Assess your organisation's position in the market-place** - understand who your main competitors are and what they are doing
- **Examine the most effective distribution strategies** - learn from the distribution outlets analysis and discover the most appropriate distribution strategies for each country
- **Save time and money in research** - by using the report's succinct compilation and analysis of all the major market data
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