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Egyptian TROPICAL FRUIT JUICE

Mango, Passion, Guava & Mixes in the German Market

Supporting Egypt's Processed Foods Export Industry

Prepared By Agriculture-Led Export Businesses (ALEB)

October 2000

Funded by
U.S. Agency for International Development
USAID/Egypt
RP 0264
Under Contract No:
263-C-00-99-00011-00
USAID Cognizant Technical Office: USAID/Egypt/EG/ED
CTO: Mr. Tarek Shata

ALEB Egypt Agriculture Led Export Businesses
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SRD SRD Research Group Inc.
Food and Ingredience technology for emerging economies
Prepared by Samuel R. Daines Research Group Inc.
under subcontract to Abt Associates Inc.
funded by USAID Contract No. 263-C-00-99-00011-00

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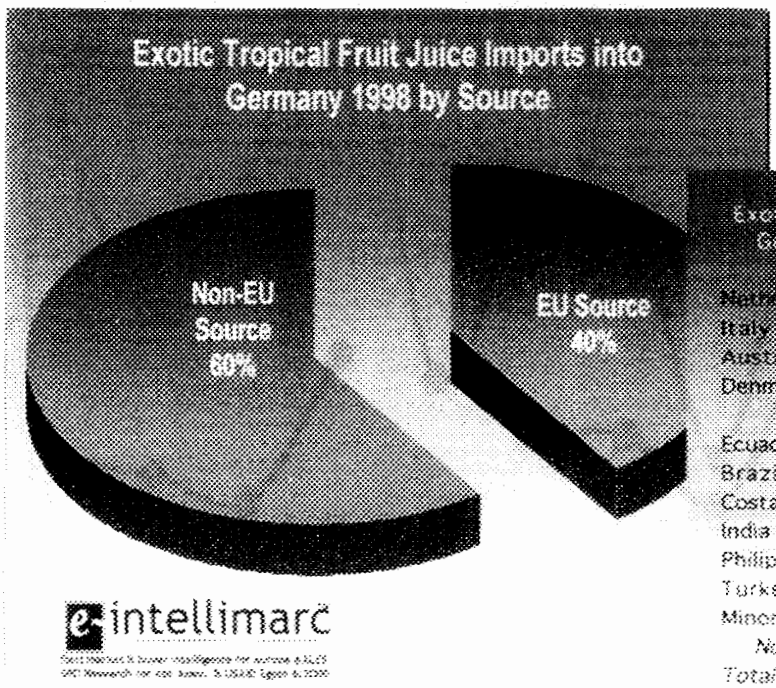
Imported Exotic Fruit Juices in the German Market: Mango, Passion, Guava and Mixtures

1. Export Opportunity Identification

a. Size of the German Import Market for Exotic Tropical Grape Juice by Source

The tables and charts on this page measure the metric tons of imported product received from each supplying country during 1998 and the percentage share each has in the German import market. These tables and charts assist in identifying the size and competitive structure of the German exotic tropical juice export opportunity.

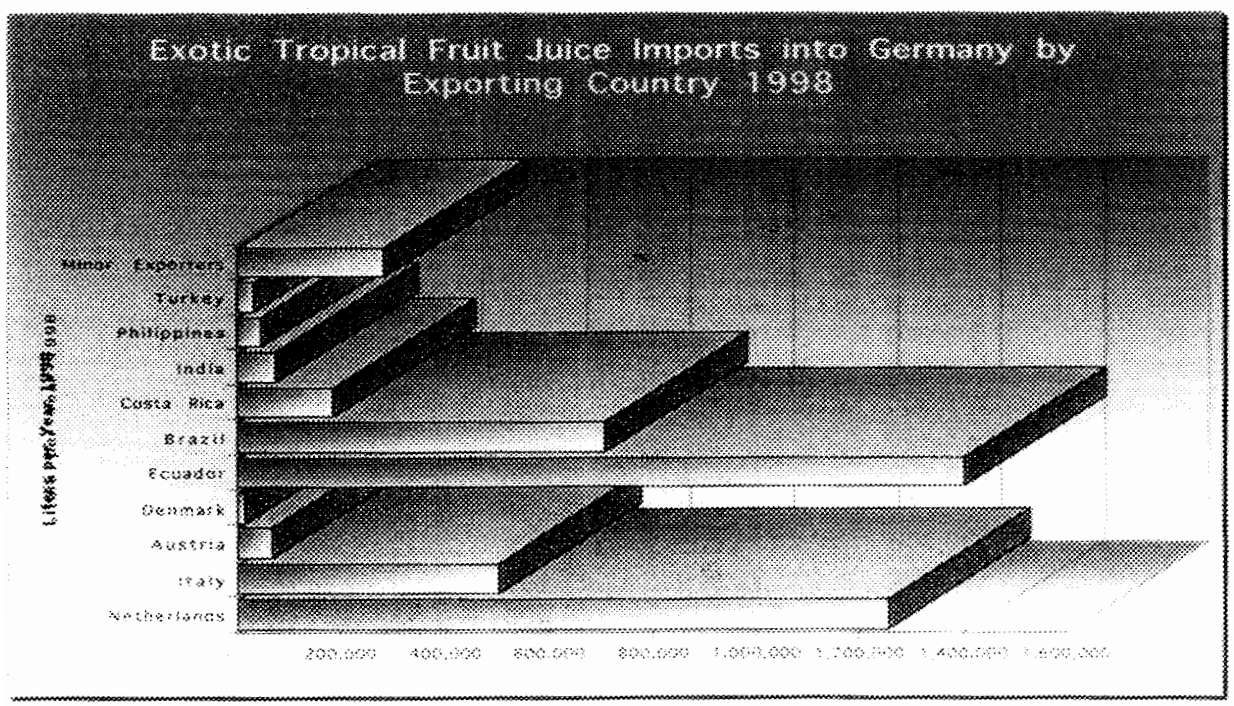


Exotic Tropical Fruit Juice Imports into Germany by Exporting Country 1998

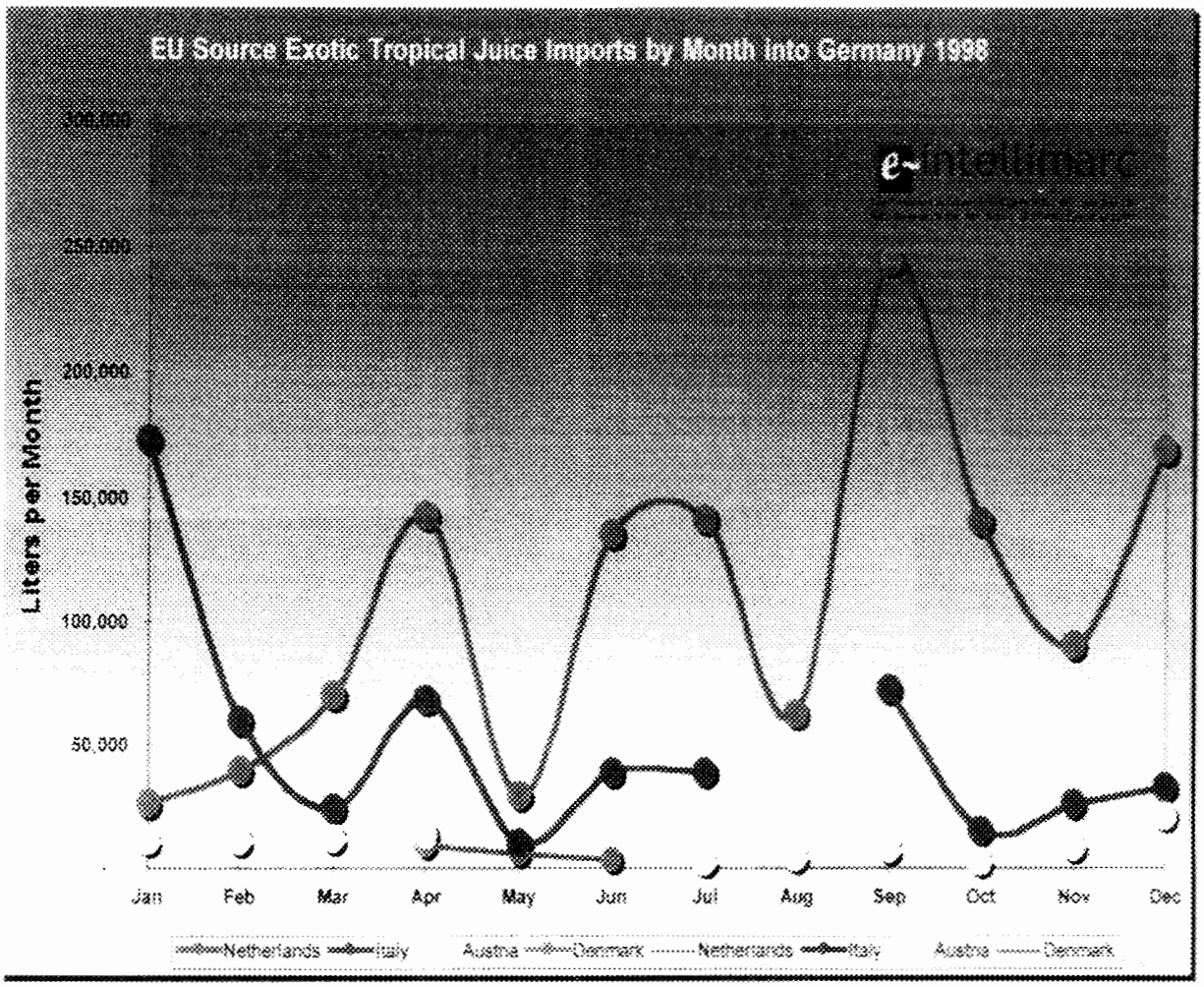
	Liters	Percentage
Netherlands	1,253,500	27.5%
Italy	501,000	11.0%
Austria	66,400	1.5%
Denmark	13,200	0.3%
EU Total	*1,834,100*	*40.2%*
Ecuador	1,402,500	30.7%
Brazil	706,200	15.5%
Costa Rica	185,700	4.1%
India	72,700	1.6%
Philippines	45,400	1.0%
Turkey	33,000	0.7%
Minor Exporters	282,400	6.2%
Non-EU Total	*2,727,900*	*59.8%*
Total Imports	4,562,000	100.0%

Note: "Exotic Tropical Fruits" excludes pineapple and citrus. The major exotic tropical juices in the German retail market are (1) passion fruit, (2) guava and (3) mango. Juices and concentrates of various brix values are included.

b. Import Market Share by Competitive Supplier Country



2. Monthly Import Quantities by Supplier Country

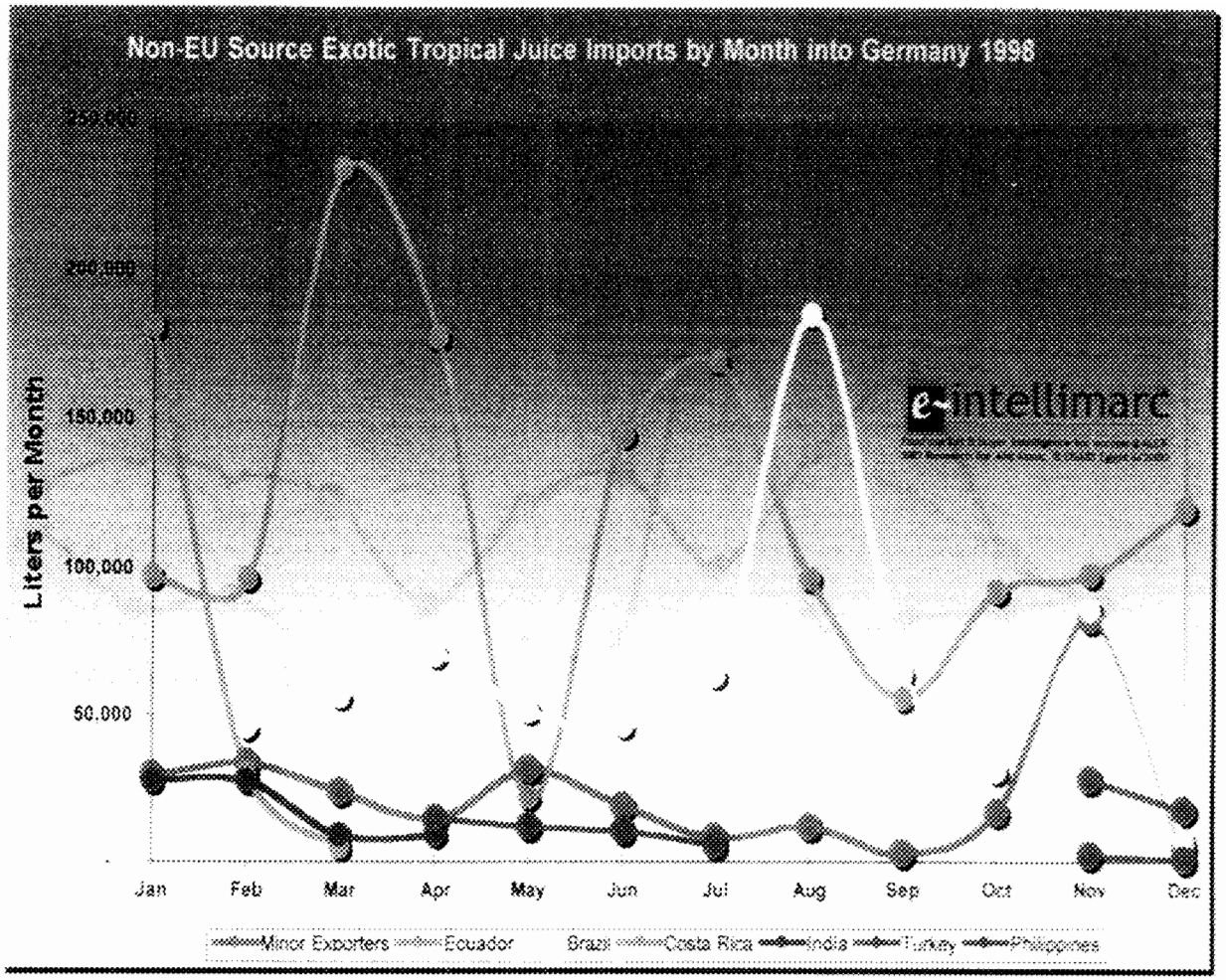


The graphs and tables on this page measure the monthly quantity, in thousand of liters, of exotic tropical juice imported into Germany from each of the indicated supplier countries during 1998. With these charts and tables it is possible to compare the seasonality of import supplies from major and minor suppliers with seasonal supply possibilities from Egypt to identify seasonal opportunities and the seasons of supply by competitor countries.

Exotic Tropical Fruit Juice Imports into Germany 1998 by Mounth and Exporting Country (Liters per Month)

	Netherlands	Italy	Austria	Denmark	Total
January	26,100	173,500	10,800	-	210,500
February	-	-	-	-	-
March	70,200	24,300	-	-	94,500
April	143,200	68,100	13,600	9,600	234,500
May	29,800	10,000	-	-	39,800
June	135,200	39,100	-	3,600	177,900
July	141,300	39,100	2,200	-	182,600
August	62,700	-	-	-	62,700
September	244,800	72,600	7,300	-	324,700
October	140,700	15,200	2,600	-	158,500
November	90,300	26,200	8,800	-	125,300
December	169,200	32,800	21,100	-	223,100
Total	1,253,500	501,000	66,400	13,200	1,834,100

Note: "Exotic Tropical Fruits" excludes pineapple and citrus. The major exotic tropical juices in the German retail market are (1) passion fruit, (2) guava and (3) mango. Juices and concentrates of various brix values are included.

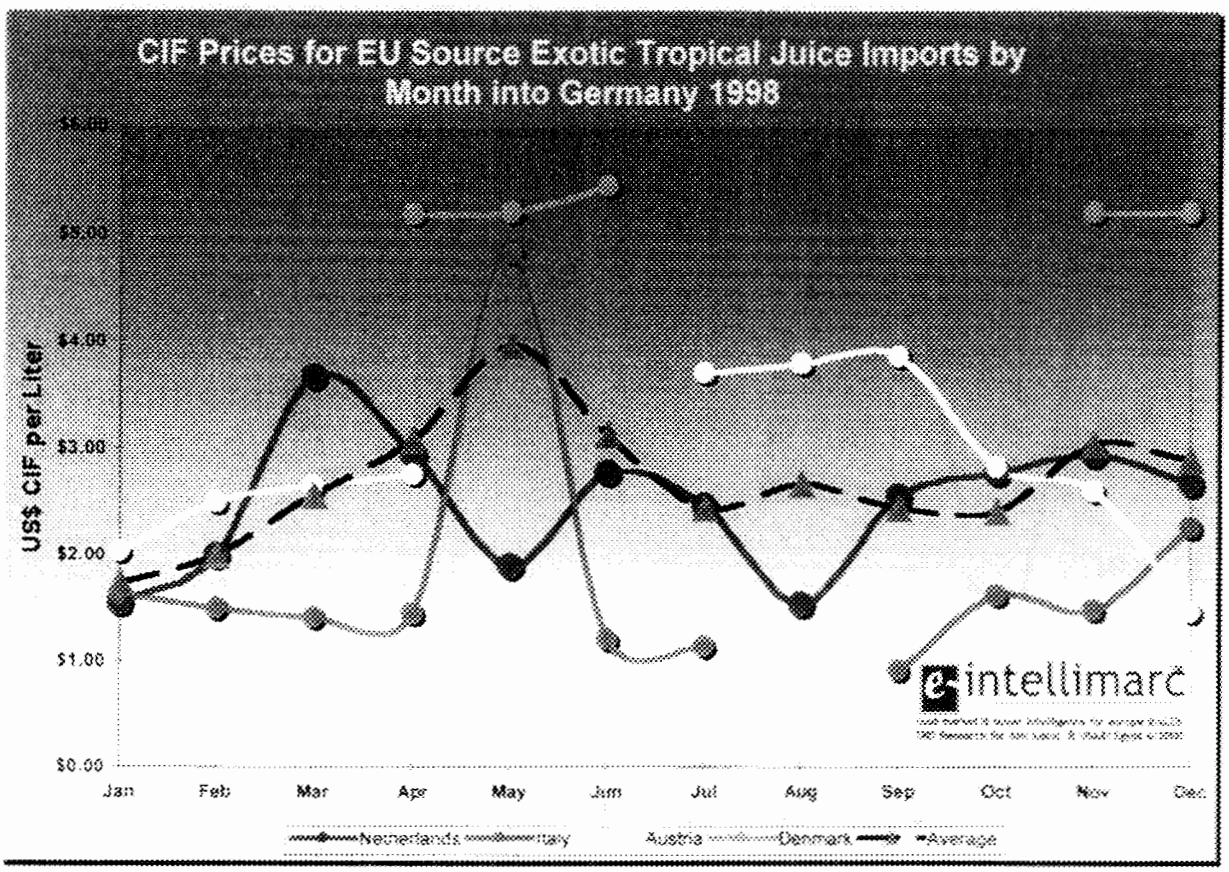


Exotic Tropical Fruit Juice Imports into Germany 1998 by Mounth and Exporting Country (Liters per Month)

January	20,700	[illegible]	[illegible]	[illegible]	27,900	[illegible]	[illegible]	[illegible]
February	33,800	96,100	45,500	-	27,200	-	-	202,700
March	23,900	233,600	55,900	4,700	9,100	-	-	322,200
April	15,000	177,400	70,200	-	9,100	14,600	-	286,300
May	31,700	22,100	51,500	-	-	-	-	105,300
June	19,100	144,900	46,600	-	-	10,800	-	221,400
July	8,400	169,900	63,100	-	-	5,800	-	247,200
August	12,200	96,000	185,700	-	-	-	-	293,900
September	3,000	55,700	64,000	-	-	-	-	122,700
October	17,200	91,800	30,900	-	-	-	-	139,900
November	83,200	97,900	85,900	-	-	1,800	27,900	296,700
December	5,200	120,200	6,800	-	-	-	17,500	149,700
Total	282,400	1,402,500	706,200	185,700	72,700	33,000	45,400	2,727,900

Note: "Exotic Tropical Fruits" excludes pineapple and citrus. The major exotic tropical juices in the German retail market are (1) passion fruit, (2) guava and (3) mango. Juices and concentrates of various brix values are included.

3. CIF Import Prices by Month and Competitor Country.



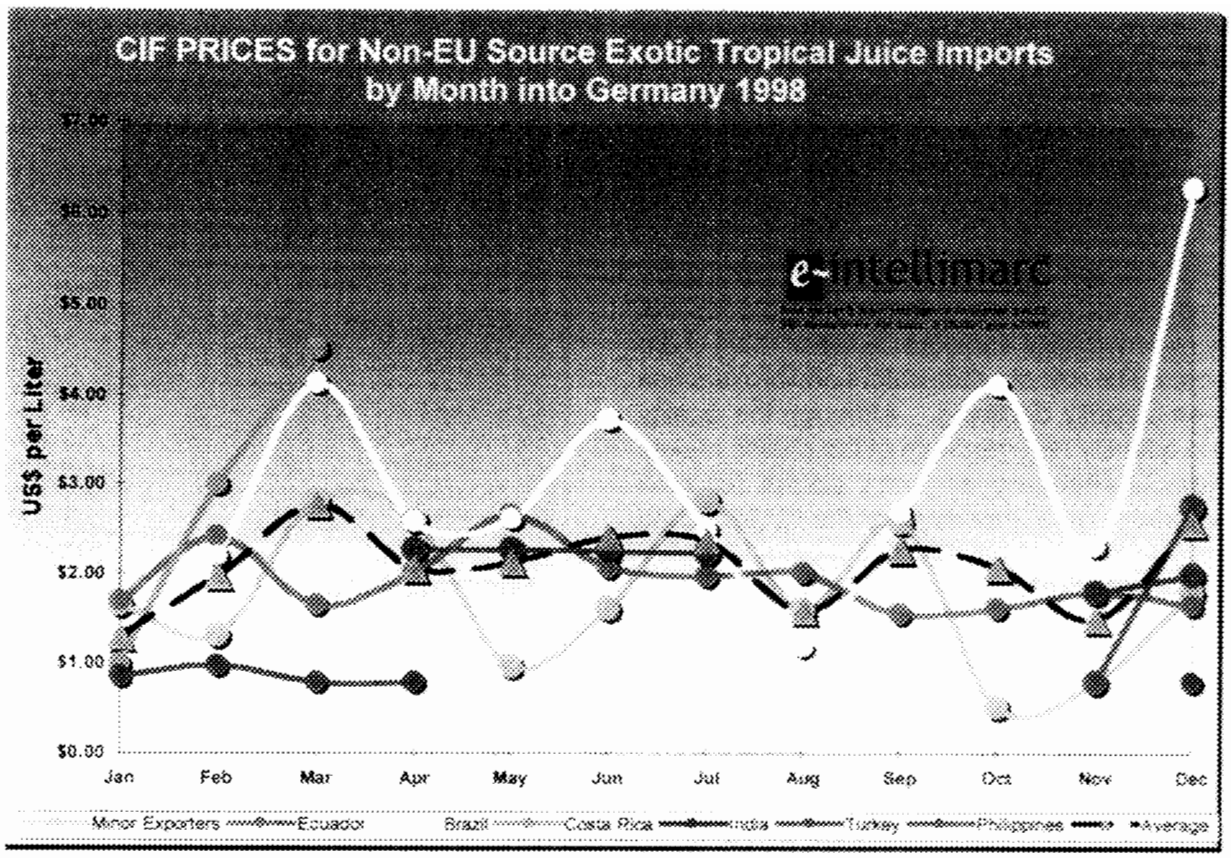
The tables and graphs on this page and the opposite page present the monthly average CIF (domestic cost of goods, transport insurance and freight) price received by each of the EU (this page) and Non-EU (opposite page) supplying countries of imported exotic tropical juice into Germany in 1998. These figures and graphs can be useful indicators of the viability and profitability of exporting from Egypt during different seasons of the year.

By comparing these CIF prices with the estimated product, packing, packaging costs, insurance and freight to Germany from Egypt, it

EU Source Exotic Tropical Fruit Juice Imports into Germany 1998 by Mounth and Exporting Country

	Netherlands	Italy	Austria	Denmark	Average
January	$1.55	$1.64	$2.04		$1.74
February					
March	$3.67	$1.41			$2.54
April	$2.95	$1.45	$2.76	$5.19	$3.09
May	$1.89	$4.82			$3.36
June	$2.78	$1.21		$5.45	$3.14
July	$2.47	$1.14	$3.71		$2.44
August	$1.53				$1.53
September	$2.55	$0.91	$3.86		$2.44
October	$2.78	$1.61	$2.83		$2.41
November	$2.94	$1.48	$2.60		$2.34
December	$2.66	$2.25	$1.47		$2.13
Average	$2.53	$1.79	$2.75	$5.32	$2.47

Note: "Exotic Tropical Fruits" excludes pineapple and citrus. The major exotic tropical juices in the German retail market are (1) passion fruit, (2) guava and (3) mango. Juices and concentrates of various brix values are included.



is possible to make preliminary rough estimates of potential profitability. By making this comparison with specific competitor countries it is possible to make preliminary estimates of competitive viability against specific supplier countries in specific seasons. Comparison of a processor's estimated "breakeven" CIF price in Germany with these averages can provide a useful preliminary screening criterion of export viability.

Non-EU Source Exotic Tropical Fruit Juice Imports into Germany 1998 by Mounth and Exporting Country

January	$1.66	$1.71		$1.00	$0.87			$1.51
February	$1.32	$2.44	$2.21		$0.93			$1.74
March	$2.84	$1.67	$4.13	$4.52	$0.81			$2.79
April	$2.61	$2.02	$2.59		$0.81	$2.29		$2.07
May	$0.98	$2.66	$2.63					$2.09
June	$1.63	$2.08	$3.73			$2.27		$2.43
July	$2.82	$1.98	$2.50			$2.25		$2.39
August	$1.61	$2.02	$1.21					$1.61
September	$2.59	$1.56	$2.70					$2.28
October	$0.52	$1.62	$4.11					$2.08
November	$0.81	$1.81	$2.32			$1.82	$0.81	$1.51
December	$1.81	$1.67	$6.31				$2.78	$3.14
Average	$1.77	$1.94	$3.13	$2.76	$0.87	$2.16	$1.79	$2.12

Note: "Exotic Tropical Fruits" excludes pineapple and citrus. The major exotic tropical juices in the German retail market are (1) passion fruit, (2) guava and (3) mango. Juices and concentrates of various brix values are included.

4. Distribution Channels and Estimated Distributor Acquisition Contract Prices

The table to the right estimates the percentage of food which is sold through the five different types of retail stores in Germany. The list of stores below includes the ones, highlighted in red, which have been selected for profiles and briefs in the following sections.

Over the last 20 years, more and more juice products are purchased directly from processors by supermarkets and other types of retail chain stores. The role of wholesalers and brokers has been steadily declining. Although the quality and quantity requirements of the chains makes them challenging as entry points for new exporters, its is important for the longer run to begin planning for direct sale arrangements to the chains.

Even if a broker, wholesaler, or processor is the Egyptian exporter's entry point into the market, it is still important for that exporter to understand the pricing structure and product specifications of the chains in order to negotiate a profitable wholesaler deal.

SRD Estimates of Food Sales by Type of Retail Outlet for Germany	
Hypermarkets	28.0%
Supermarkets	29.8%
Trad. Grocers	13.1%
Discounters	27.9%
Specialists	1.2%

Hypermarkets

Owner Group	*Facias*	
Metro Group (*Asko, SB-Kauf Deutsche, MHB*)	Massa Basar Huma/Suma	'real-' Meister Primus
Tengelmann	Gross Magnet Magnet Markte	Kaiser
AVA	Marktkauf	
Lidl & Schwarz	Kaufland	Concord
Allkauf	Allkauf	
Globus	Globus	
Wertkauf	Wertkauf	
Rewe & Co.	Toom	
Promohypermarkt	Continent	Plaza

Discounters

Lidl & Schwarz	Lidl	
Tengelmann	Plus	LeDi
Spar Handels	Netto	
Aldi	Aldi	

Supermarkets

Owner Group	*Facias*	
SHV Makro	Otto Reichelt	
Tenglemann	Tenglemann	
Metro Group	Mien Markt	extra
Lidl & Schwarz	Handelshof	
Kathreiner	Komm	Krone
AVA	Dixi	
Deutscher Supermarkt		

Traditional Small Stores

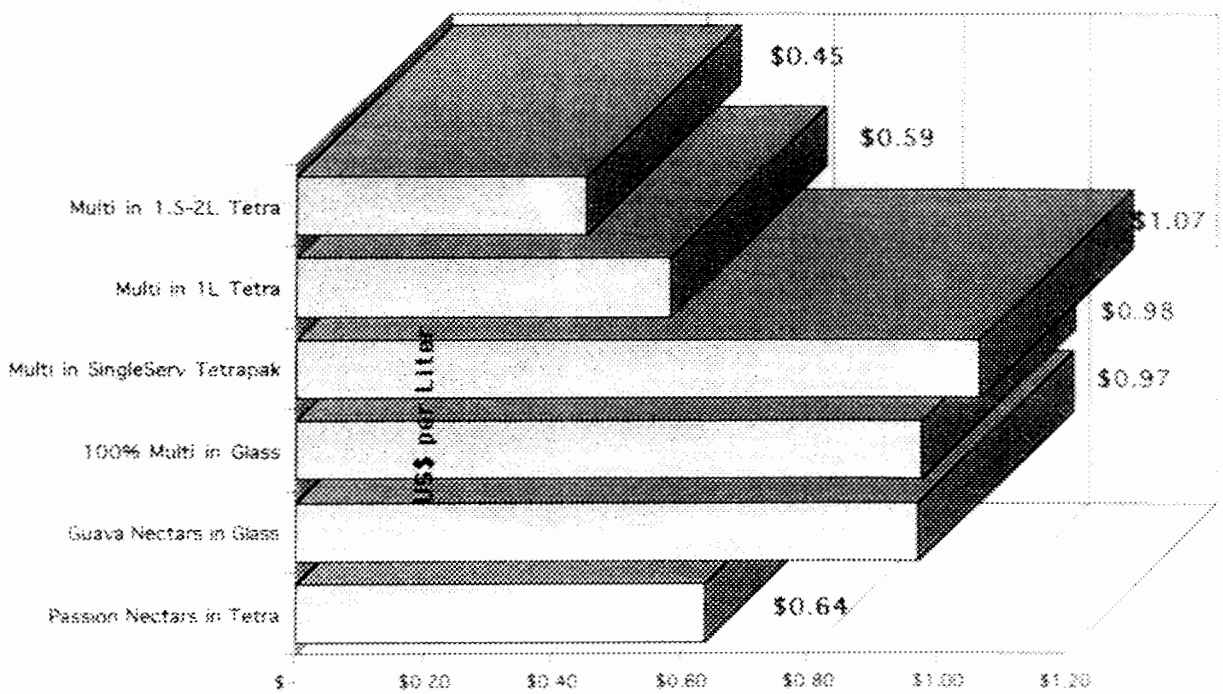
Tenglemann	Mini
Kupsch	Kupsch
Norma	**Norma**
Edeka	Neukhauf

The graph below estimates the average price during the whole year of 1998 which the five profiled types of retail chains in Germany paid for an average liter of exotic tropical fruit juices and mixtures.

The figures represent averages of all stores sampled and group juices by different product types (single juice nectars, mixes and multivitamin), and all package sizes and types (glass, tetrapak). The chart below averages SRD/*e-intellimarc* estimates of all store types, all products and all packages to illustrate acquisition prices.

The table below provides averages of product and packaging specifications for all stores and products.

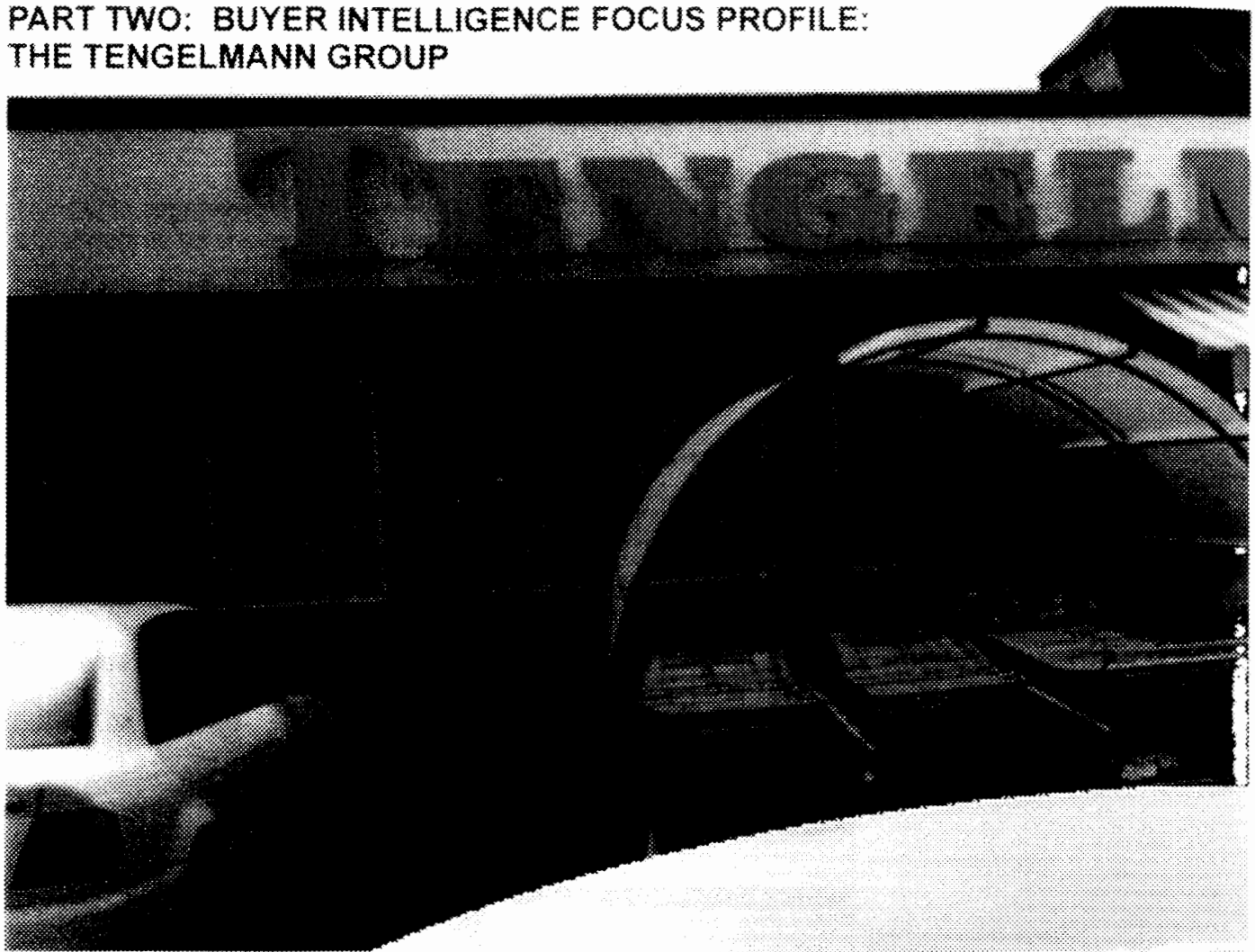
Retail Store Estimated Acquisition Contract Prices for Exotic Tropical Fruit Juices by Product and Package Format (Year 2000 Acquisitions)



Averages for All Stores by Product & Package Format

	Passion Fruit 25-50% Nectars in 1L Tetrapak	Guava 20% Nectars in Glass	100% Fruit Juice Multivitamin in Glass	50-100% Fruit Juice Multivitamin in Single Serving	20-55% Fruit Juice Miltivitamin in 1L Tetrapak	20-55% Fruit Juice Multivitamin in 1.5-2L Tetrapak
Net Contents (Liters)	1.00	0.75	0.75	0.23	1.00	1.63
Height cm	16.8	19.0	27.2	10.6	16.8	22.3
Width cm (or diameter if cylindrical)	9.5	9.1	7.1	5.5	9.5	9.7
Depth cm (or diameter if cylindrical)	6.0	9.1	7.1	5.6	6.0	7.6
Shelf Space (Cubic Centimeters)	92,408	44,055	253,206	35,233	109,166	596,490
Price Local Currency (DM)	1.57	1.79	1.79	0.59	1.44	2.06
Price in USD Retail per Package	$0.72	$0.82	$0.82	$0.27	$0.66	$0.94
USD/Liter of Single Strength Equivalent	$0.72	$1.10	$1.10	$1.20	$0.66	$0.58
Estimated 2000 Retailer Acquisition Contract Price						
US$/Package	$0.64	$0.73	$0.73	$0.24	$0.59	$0.64
US$/Liter of Single Strength Equivalent	$0.64	$0.97	$0.98	$1.07	$0.59	$0.45
Brix	13.6	14.3	12.4	15.1	5.5	14.7
SRD 4 Panel Taste Preference (1-10 scale all fruit juic	7.8	9.0	6.0	5.7	4.7	5.3
Shelf Life in Months from POP	10.0	10.0	14.0	11.8	10.0	10.8

PART TWO: BUYER INTELLIGENCE FOCUS PROFILE: THE TENGELMANN GROUP



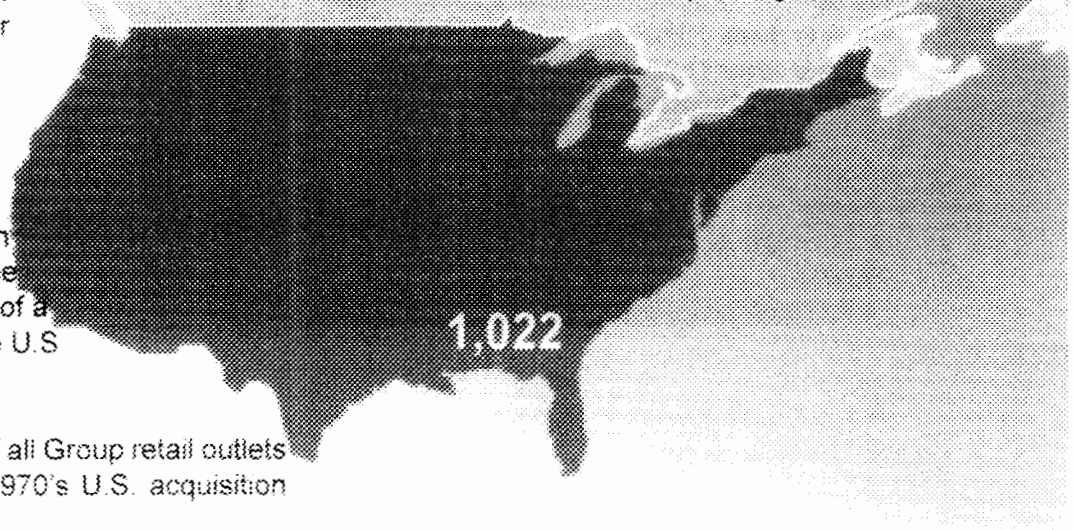
5. The Tegelmann Group: Buyer Focus Profile

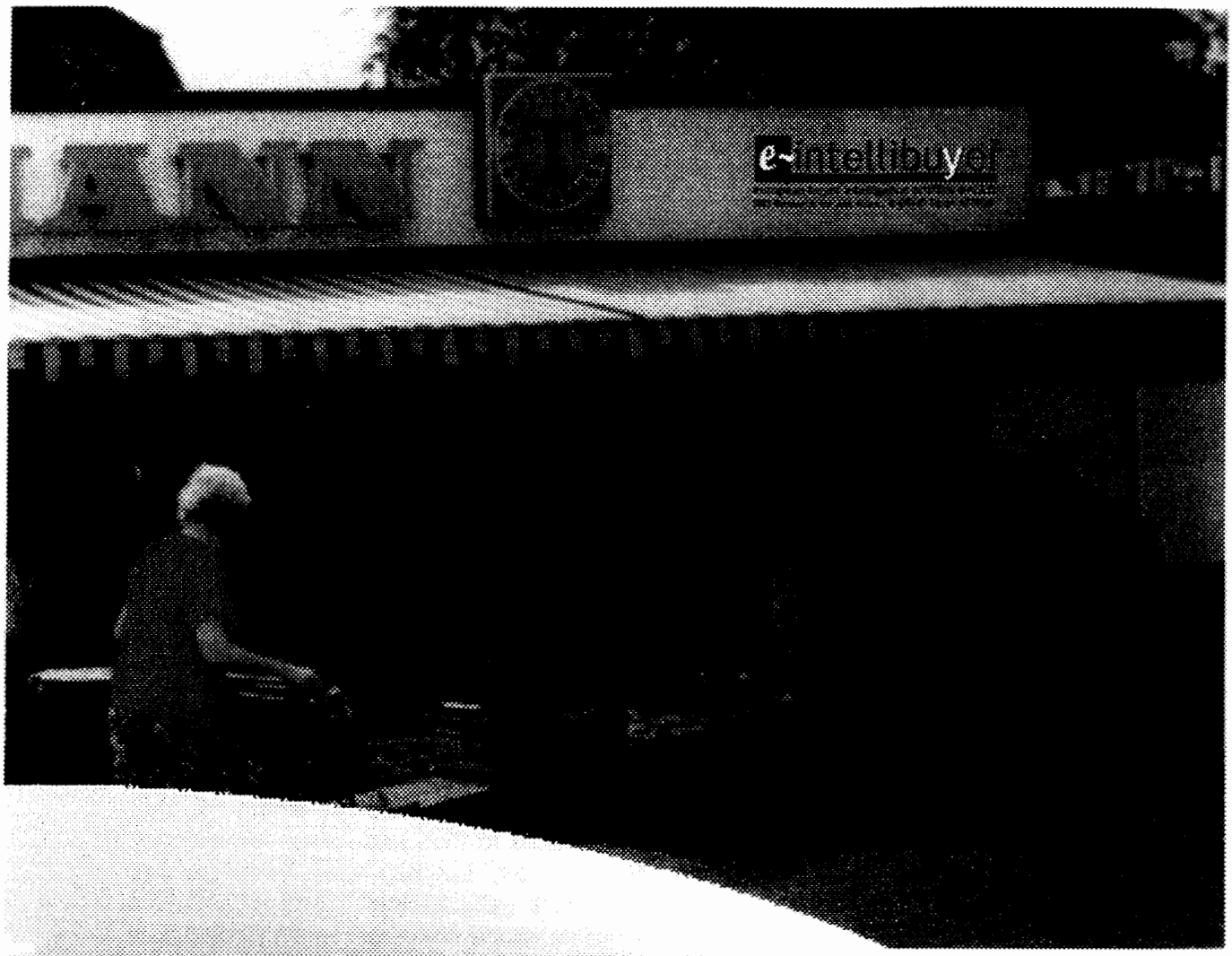
a. The Tengelmann Group: Worldwide Corporate Overview

Karl Erivan and Christian Haub are the heirs apparent to the Tengelmann Group family fortune which employs over 200,000 and sells over $20B in food and household goods. The Haub fortune was established over 100 years ago in Germany and now owns a varied set of over seven thousand retail outlets in nine countries.

During the last few decades the empire has grown principally through acquisitions, including the puchase in the late 70's of a controlling interest in the U.S supermarket giant, A&P.

Seventy three percent of all Group retail outlets are in Germany. The 1970's U.S. acquisition continues to place the U.S. in second position internationally, and Christian has formally taken over its direction. Central Europe, comprised of Austria, Hungary, the Czech Republic and Poland comprise 8% of outlets and a significant future opportunity for the group. Holland is a recent acquisition with unclear strategic import, but Italy and Spain are commonly viewed by the UK, France and Germany, as high potential



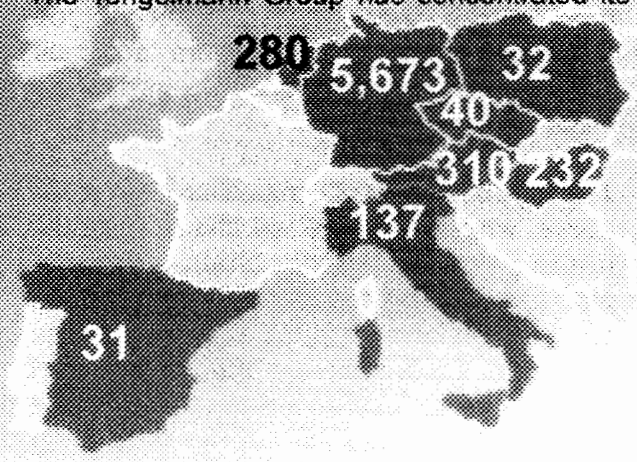


THE WORLD OF TENGELMANN

growth areas, and Tengelmann is no exception, together they contain 170 outlets. Tengelmann has recently broken new ground with the opening of a formal joint venture in Italy with a Venetian group which heralds increased activity there over the next few years.

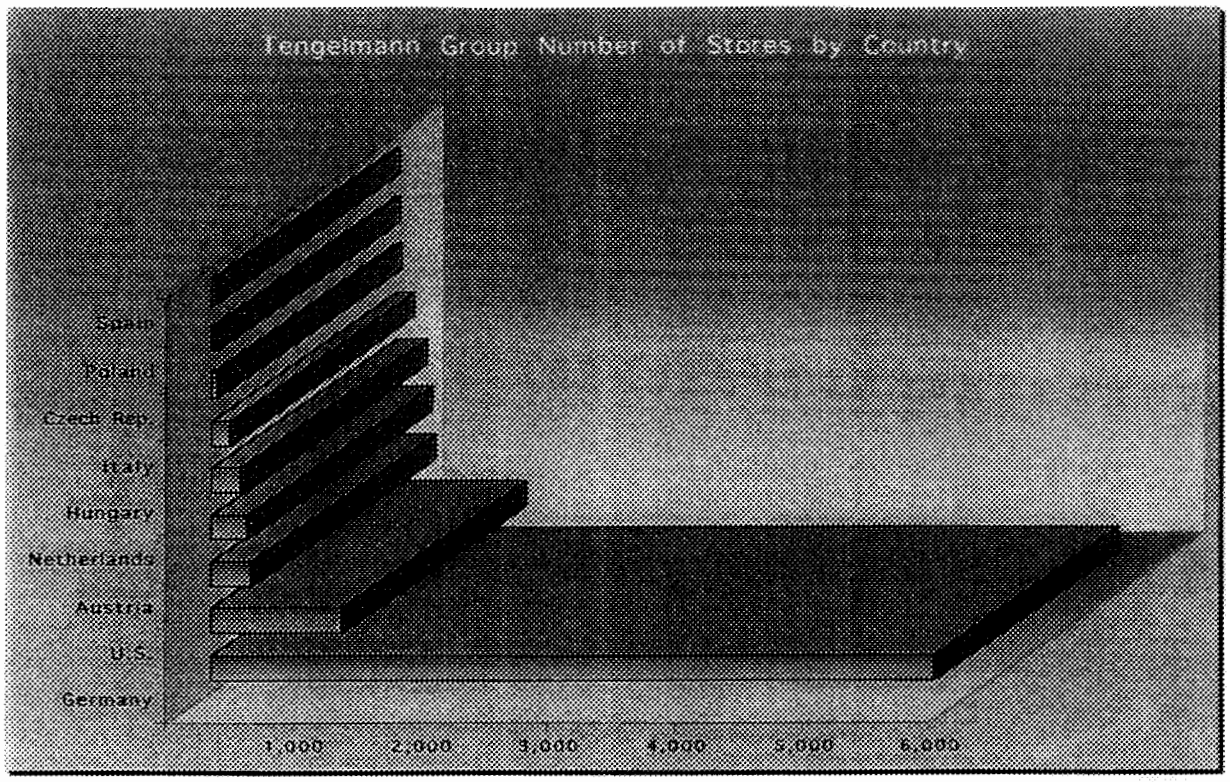
b. Tengelmann Group Marketing Strategy

The Tengelmann Group has concentrated its



marketing strategy in its original food marketing core, but very significant parts of the empire are now composed of non-food retail outlets such as the DIY monster OBI.

Perhaps the largest factor dominating marketing strategy and group structure during the last decade has been competitive pressure from discounter food supermarkets led by Lidl and Aldi. The principal strategic response of Tengelmann was to enter the discounter sector in a big way. The Tengelmann discounter facias, Plus and LeDi are now major players, much larger in fact, than the original Tengelmann supermarket facia. Large supermarket chains in the U.K., like Sainsburys, made similar forays directly into the discounter world in the 80's and 90's but has since retreated to expand and stgrengthen their original supermarket terrain. The Tengelmann group is one of the very few major European chains to have made such a vast and continuing discounter presence work.



As a private company, strategies are not widely publicized and must be sketched from actual group actions as well as statements. Officially, the Haubs talk of change through closing unproductive outlets and a "fresh front" campaign to offer an outstanding line of fresher foods. The somewhat weak and late introduction of a line of healthy foods, *naturkind* is the major obvious action in this area. There has also been emphasis on increasing private label as a marketing strategy, but the meagre 400 labels Tengelmann's now has is a relatively poor showing when one considers that they market over 30,000 total product lines.

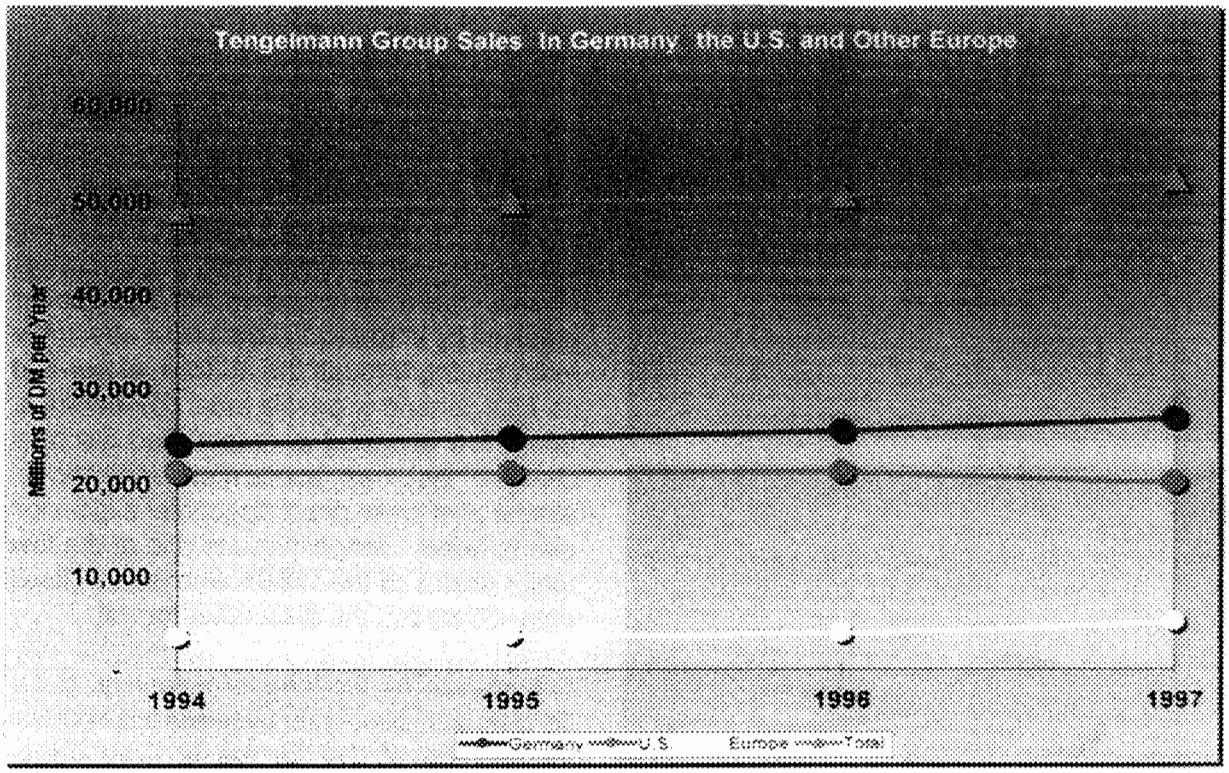
c. Tengelmann Group Strengths, Weaknesses and Strategic Opportunities

From SRD's perspective the major strengths of the Tengelmann Group are (1) the uniquely appropriate *balance* in its store format structure to confront the bipolar competition patterns which we beilive lie in the future of "supply chain" intensive sectors such as food and home "furnishings", and (2) its strong geographic position to exploit Germany's natural advantage in Central, South Eastern and Eastern Europe.

For the purpose of understanding and evaluating Tengelmann's "*balance*" strength, it is useful to sketch the growth future of the product sector which SRD charaterizes as "supply chain" intensive, which roughly corresponds to food and home "furnishings". "Supply chain" intensity refers to the need to maintain a geographically complex and time sensitive supply chain due to the presence of perishable products in the retail product mix.

Thus retail food outlets must include fresh, frozen and short shelf-life products, and given the seasonality of production, the supply chain must include tropical as well as nearby supply locations. The word "furnishings" in the product category "home furnishings" does not refer to furniture, but to all of the other home and garden products which are characteristically sold in DIY and garden center outlets. Like food syores, these outlets must include perishable items such as flowers, and their supply chain therefore qualifies as "supply chain intensive".

The bi-polar pattern of competition, referred to above, which we belive will characterize the future of these "supply chain intensive" products, involves the concentration of growth opportunities at store format scales above the traditional supermarket in the hypermarket sector, and at pricing patterns below the traditional supermarket in the discounter sector. Thus, from SRD's point of view, the



ideal competitive structure to take advantage of future growth opportunities would be one which is strong in two directions, scale and product. On the scale side, the ideal structure would include strong positions in both the hypermarket and discounter formats. On the product side, it would include strong positions in both food and the home (DIY/gardening) "supply-chain" intensive product sectors.

Although some European supermarket chains like Sainsburys (UK), have continuing strong DIY components, most have retreated from their earlier discounter positions, and few, if any, are as ideally balanced for the future as Tengelmann along both the scale and product dimensions of these bi-polar competition axes.

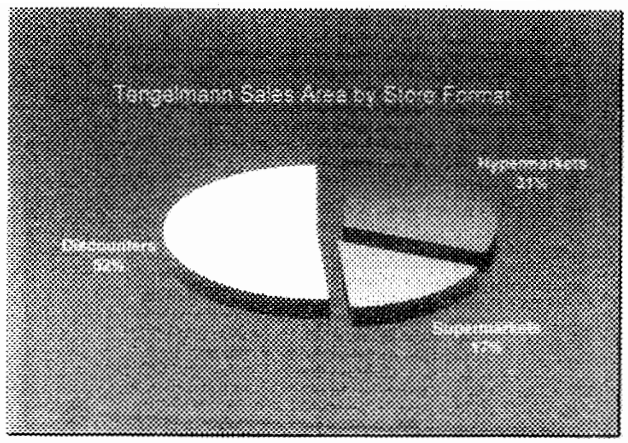
The second major Tengelmann strength is a geographic one, positioned as it is with existing strong and reasonably profitable outlets to the emerging economies East of Germany. This, SRD believes, is the geographic future of the German retail marketing giants, even though U.K. merchants are doing their best to claim terrain there.

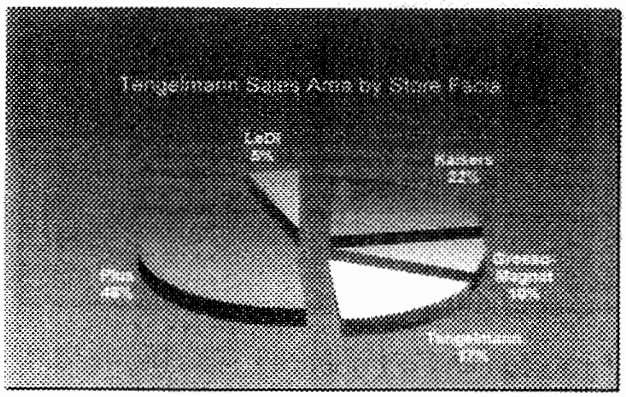
Tengelmann's principal weaknesses appear to be (1) stagnating profits in whole major facia segments of the empire, including the U.S., (2) scattered unprofitability of stores in otherwise profitable facias, and (3) a lack of adequate supply chain "verticality" to take full advantage of the inherent strength of its format structure mentioned above.

The major strategic opportunities which face Tengelmann correspond to their identified strenghts in expanding on either side (hyper and discount) of the traditional supermarket format, and in combining food and "supply intensive" home products in the opening markets of Central, South Eastern and Eastern Europe. Tengelmann's format balance gives it an opportunity to deepen market share at home and expand to the East.

Tengelmann Group Sales (Millions, DM) in Germany, U.S. and Europe

	Germany	U.S.	Europe	Total
1994	24,237	21,162	3,591	48,990
1995	24,916	21,248	3,746	49,910
1996	25,346	21,242	3,983	50,571
1997	27,070	20,180	5,110	52,360





d. Tengelmann Food Group Store Formats and Sales Area in Germany

The structural balance of the Tengelmann store formats alluded to in the previous section is described in the graphs and charts in this section. These descriptions divide Tengelmann stores first by format and second by facia. The table at the bottom of the opposite page combines both concepts by showing format and facia statistics. All of these statistics on sales area and sales in this section relate only to food stores located in Germany. Tengelmann Group non-food stores in Germany and all international operations are excluded.

The graph at the top of this page shows the propotional share of store sales area in square meters for each of the three format types, hypermarkets, supermarkets and discounters. The discounter format represents 52% percent of Tengelmann food store area in Germany. This represents a major adjustment shift by Tengelmann during the last two decades in response to fierce competition pressure. Most European supermarket chains have responded to discounter pressure by introducing aggressive cost/price restructuring through the addition of low-end no-frills generic or private label product lines. Some few acquired or established discount chains of their own, but as mentioned above, almost all of these direct discounter expansion efforts failed. Tengelmann is one of the few major chains of the 1980's who is now itself concentrated in the discounter format.

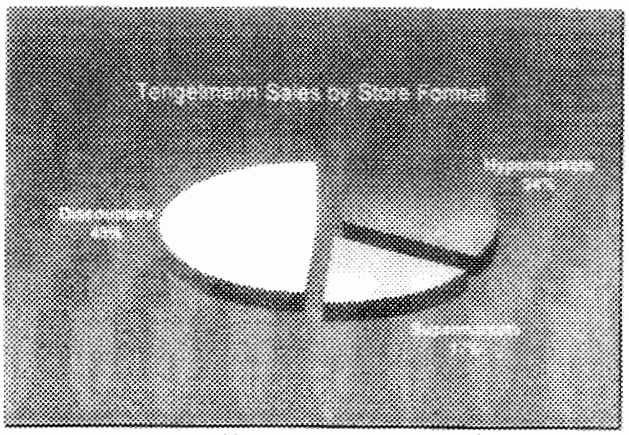
One reason for the long term survival of the Tengelmann discounter business lies in clever fine tuning of the format in their major discounter facia, Plus. Plus is not a true hard-core cement floor and pallet display discounter, and it has a respectable fresh produce offer to prove it. The graph on the left indicates that 46%, out of the 52% discounter sales area is in the modified format Plus facia, and only 5% is in the hard-core discounter format represented by LeDi. Easily the most important trend in the last two decades for European supermarket chains has been competitive pressure from discounters. The Tengelmann group is positioned at the beginning of the 21st century not just to respond to that pressure, but to harness it and benefit directly from it.

The second major format for Tengelmann store sales area is the hypermarket format with 31%, divided between the Kaisers (22%) and Grosso-Magnet (10%) facias. Since the

Tengelmann Group Food Sales (Millions DM 1997) and Sales Area (000 Sq.M.1997) by Store Format in Germany

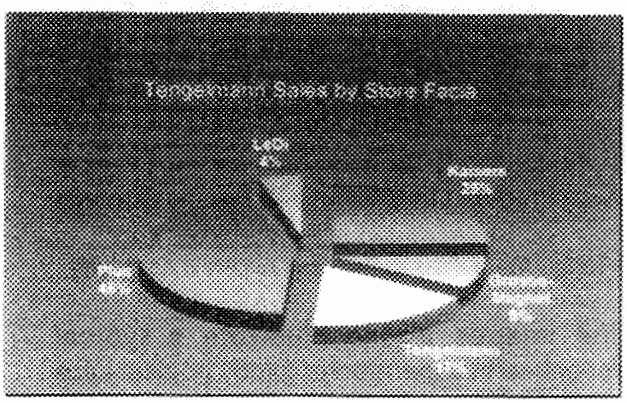
Outlet Type	Sales (Million DM)	Sales Area (Sq. Meters)	% Sales (%)	% Sales Area (%)	Sales/Sq.M. (DM/Sq.M.)
All Stores	19,744 DM	2,643,610	100.0%	100.0%	7,469 DM
Hypermarkets	6,630 DM	832,486	33.6%	31.5%	7,964 DM
Supermarkets	3,450 DM	452,706	17.5%	17.1%	7,621 DM
Discounters	9,664 DM	1,358,418	48.9%	51.4%	7,114 DM

hypermarket format has the highest turnover per square meter, this translates into 34% of overall food sales as illustrated in the graph on the right.

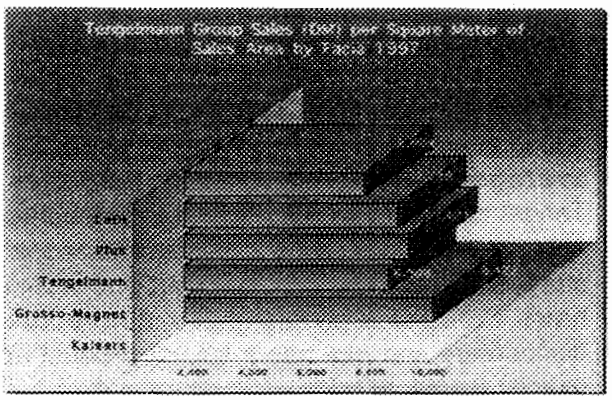


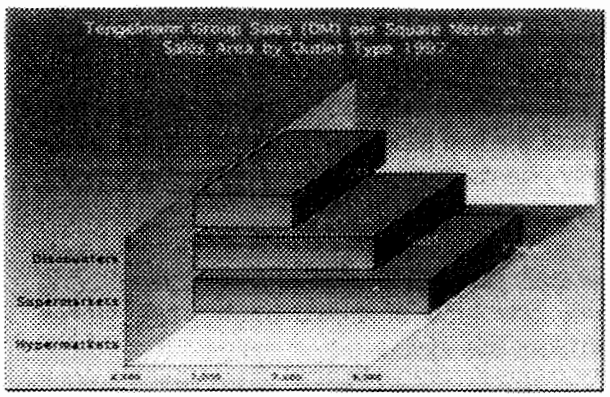
The traditional supermarket format, represented by the Tengelmann facia, lies in the middle of the discounter and hypermarket poles with sales per square meter at 7,621DM. This gives the supermarket format the same , albiet low, percentage (17%) in both sales area and sales.

e. Negotiation Notes and Models for Developing Tengelmann Strategic Alliances



Two factors are important in developing a model for negotiating possible supply and related strategic alliances with the Tengelmann Group. The first is to realize that in contrast to groups like Migros in Switzerland, Tengelmann does not have its own vertically integrated fruit juice processor. Thus an Egyptian fruit juice supplier must either produce its own final consumer pack and be able to meet Tengelmann's volume and quality requirements, or strike an industrial product deal with a Tengelmann supplying processor. The second factor is that the Tengelmann group has recently backed off from its earlier strategy to consolidate its supply chain across facias. What is left is a complex and somewhat inconsistent system of partially integrated and partially independent supply chains for each facia. Thus strategic supply alliances must be approached facia by facia and not for the group as a whole.





Tengelmann Group Food Sales (Millions DM 1997) and Sales Area (000 Sq.M 1997) by Store Format and Facia in Germany

Facia	Outlet Type	Sales (Million DM)	Sales Area (Sq. Meters)	% Sales	% Sales Area (%)	Sales/Sq.M. (DM/Sq.M.)
Kaisers	Hypermarket	4,890 DM	580,591	24.8%	22.0%	8,422 DM
Grosso-Magnet	Hypermarket	1,740 DM	251,895	8.8%	9.5%	6,908 DM
Tengelmann	Supermarket	3,450 DM	452,706	17.5%	17.1%	7,621 DM
Plus	Discounter	8,780 DM	1,213,126	44.5%	45.9%	7,238 DM
[illegible]	Discounter	884 DM	145,292	4.5%	5.5%	6,084 DM
[illegible]	[illegible]	19,744 DM	2,643,610	100%	100%	7,469 DM

Tengelmann Supermarket Typical Exotic Tropical Juice Shelf Display

f. Tengelmann Supermarket Exotic Tropical Juice Product Line, Brand and Pricing Strategy

i. Tengelmann Exotic Tropical Juice Product Line

The images above illustrate a typical Tengelmann supermarket exotic tropical juice shelf display excluding pineapple and citrus juices. The Tengelmann exotic juice product line is comprised of only two offerings, a passion fruit 25% nectar in a no-frills 1 liter tetrapak and a 12 juice 100% multivitamin in a 750 ml glass pack. This appears to be a relatively disinterested offering, it is even small when compared with the much smaller discounter and traditional stores which display three or four products in their exotic juice line. Passion is the most offered single exotic, four out of the five stores sampled carried it, while only one carried guava, and none displayed a mango nectar.

Tengelmann's was also the only store carrying only one type of mixed exotic, two stores product line included four mixes.

The brix level of Tengelmann's 25% passion fruit nectar was measured at 13.0 and 12.5 for the 100% 12 fruit multivitamin mix. The taste preference panel rated the passion nectar at 8.0 and the multivitamin at 7.5. These scores were the highest for each of these categories for the five stores sampled.

ii. Tengelmann Exotic Tropical Juice Brand Strategy

Reflecting the earlier mentioned lack of vertical integration and lack of Tengelmann private labels, both of the exotic juice products are produced by independent suppliers and neither is a Tengelmann label. The no-frills passion nectar tetrapak product is processed by Krings Herrath Fruit-Drinks of Monchengladbach, and the glass pack multivitamin by Emig AG in Rellingen.

iii. Tengelmann Exotic Tropical Juice Pricing

Tengelmann's priced its 25% passion nectar at US$ 0.82/liter, which was somewhat above the normally more expensive traditional store at , Kupsch, but expectedly above the price competitor discounter Aldi at US$ 0.59/liter and the Hypermarket, Kaufland, at US$ 0.68/liter.

The Tengelmann 100% juice multivitamin was priced at US$ 0.85/liter significantly below the average of all stores, US$ 0.98/liter. Tengelmann's price position was expected appropriately lower than the high end traditional store, Kupsch (US$ 1.60/liter) but one would have thought it would price above the discounters, yet Aldi has a similar product at exactly the same price.

g. Tengelmann Exotic Tropical Juice Shelf Space Allocation and Product Movement Analysis

The typical Tengelmann supermarket shelf space allocation for exotic tropical juice occupies a total of 228 liters of gross cubic shelf area. The widest divergence and most surprising differences between the stores sampled is in shelf space allocation. One

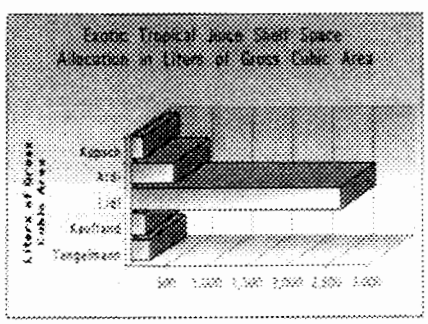
would expect that in an exotic product category, a mid-sized store like Tengelmann would be expected to have a mid range in the number of its products on offer and in the total shelf space devoted to the exotic line. Correspondingly, a much larger hypermarket such as Kaufland, and smaller traditional stores like Kupsch would be expected to play their roles with more or less offerings and spaced allocated.

The discounters would be expected to be a bit unpredictable, since they specialize in a spotty selection of products with large space allocations to each. Tengelmann, and to an even greater degree Kaufland, appear to have little confidence in exotic juices as a product line.

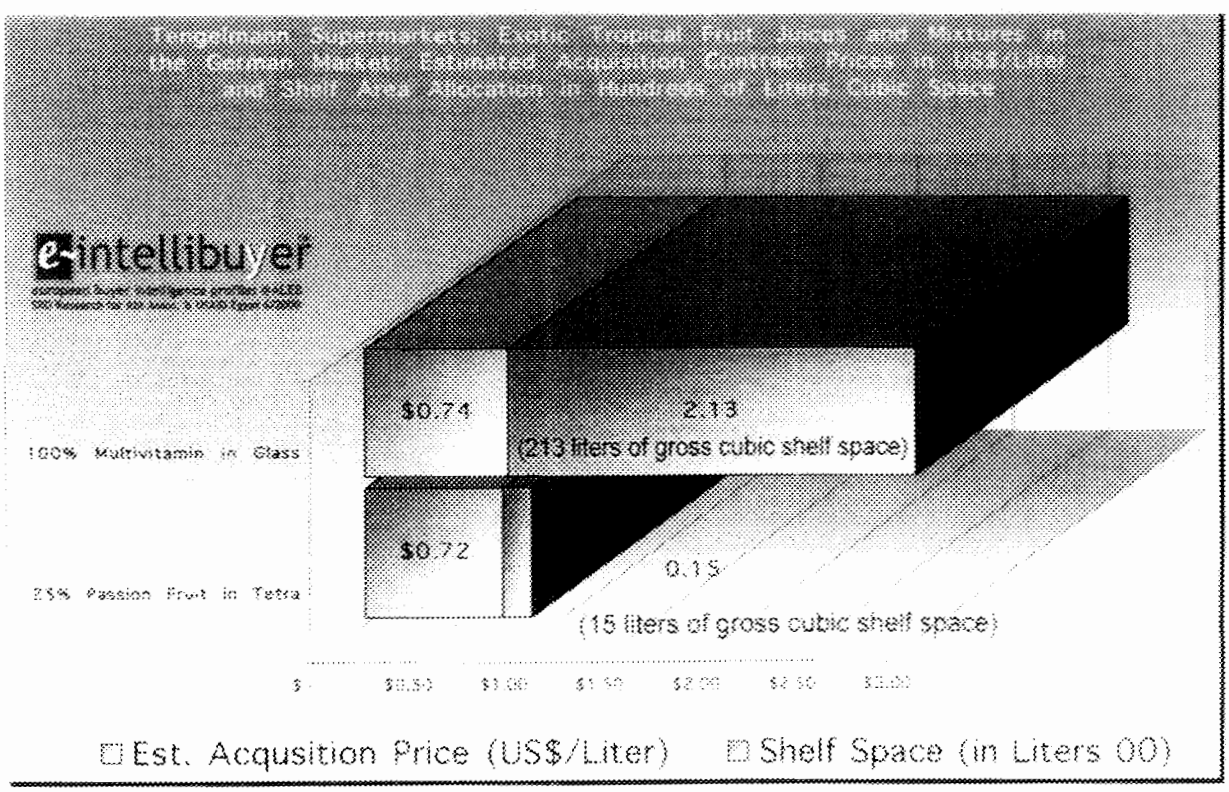
Tengelmann has chosen the smallest offering, only two products, devoting almost all of its modest shelf space to the single 12 juice multivitamin product. In contrast, Kaufland has a "shotgun" offering of six products but a very small total area, almost as small as the neighborhood traditional store, Kupsch.

In contrast, the two relatively small discounter chains have both bet heavily on the exotic line. Lidl has concentrated on a single product type the 12 fruit multivitamin juice, which they offer in four different strengths, from 20%-100% and in a dazzling range of sizes from 20ML single use to 2 liter family pack. With a store size considerably smaller than Tengelmann, Lidl allocates more than ten times as much shelf space to exotic juices. Aldi has allocated only one fifth the Lidl area, but that is still more than double the space allocated by the much larger Tengelmann stores.

Exotic Juice Shelf Space in Liters Gross Cubic Area	
Tengelmann	228.23
Kaufland	171.55
Lidl	2,597.07
Aldi	532.69
Kupsch	150.65
Average	736.04



These differences indicate a wide range of differing views as to customer demand for exotic juices. The strong discounter position suggests that there is more potential among average income consumers than one might expect for a specialty product like exotic tropical juices.

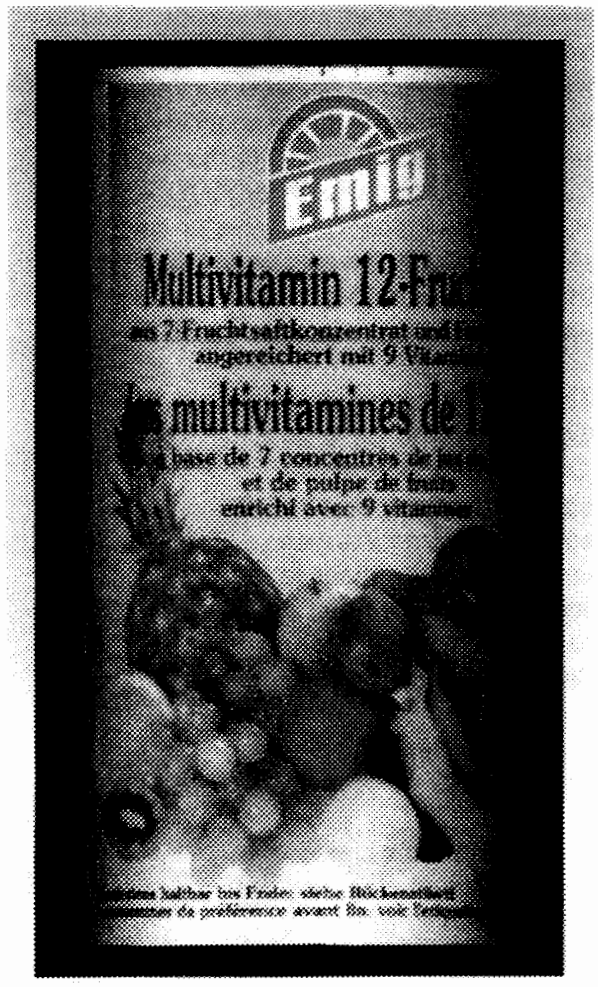


h. Tengelmann Exotic Tropical Juice Packaging

The table below provides detailed specifications for the Tengelmann exotic tropical juice packaging. In Germany, most single tropical juices are marketed in tetrapak containers, like the Tengelmann passion fruit 1 liter pack. There are some exceptions to this such as the Eckes Granini glass-pack sold by Kaufland.

In contrast, the tropical fruit juice mixtures, which are popular in Germany and Switzerland as health drinks with added vitamins, are sold in both tetrapak and glass.

The passion fruit tetrapak used by Tengelmann is a no-frills package without a screw-top or combi opening. The package is printed with four color CMYK separations with a heavy wax coated, and foil backed paper. Tengelmann's sole multivitamin mixture is packed in a good quality brown glass container with 750 ml capacity. The bottle has a twist top screw cap with good quality labelling.



Supermarkets

Store Facts and Parent	Tengelmann Facts: Tengelmann Group		
Product Type	Passion Nectar 25%	12 Fruit Multivitamin 100%	Average
Brand	Kinigs	Emig	
Net Contents (Liters)	1.00	0.75	0.88
Package Type	Tetra Pak	Brown Glass	
Height cm	16.8	27.0	21.9
Width cm (or diameter if cylindrical)	8.5	7.4	8.0
Depth cm (or diameter if cylindrical)	6	7.4	6.7
Shelf Space (Cubic Centimeters)	15,322	212,907	114,114
Price Local Currency (DM)	1.79	1.39	1.59
Price in USD Retail per Package	$0.82	$0.64	$0.73
USD/Liter of Single Strength Equivalent	$0.82	$0.85	$0.84
Estimated 2000 Retailer Acquisition Contract Price			
US$/Package	$0.72	$0.56	$0.64
US$/Liter of Single Strength Equivalent	$0.72	$0.74	$0.73

Estimated Packaging Specifications (reverse engineered)

	Foilpacked Tetra short rectangle format with screw or combi opening. Cartons: 0.5mm, foils: 14mm, films: 0.2mm, 4 color CMYK sep. print, w. wax coat	Brown Glass with screwtop cap. Base 7.4cm diameter. 5mm glass thickness. Mouth opening 2.8cm. Paper labels w 4 color CMYK sep. printing on 20 lb. Chromacote. Back label with three spot color printing on 20 lb. Chromacote

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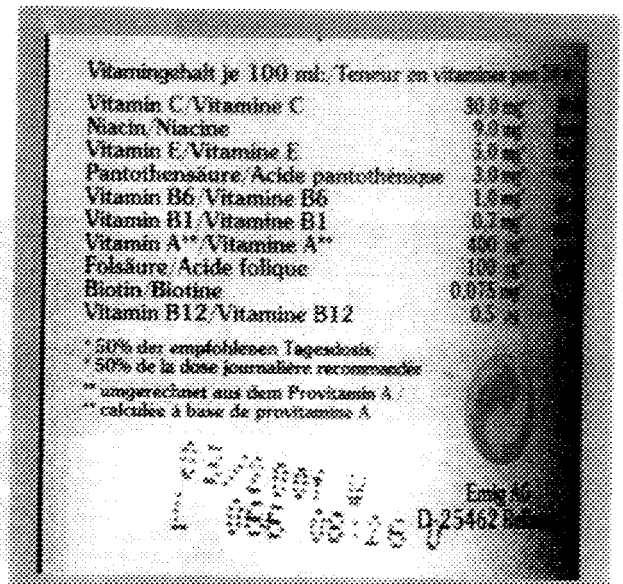
360 Research for the food, beverage & retail trade worldwide

Product Specifications

	Reconstituted from passion fruit concentrate. Minimum fruit content 25%. Ingredients: Water, passion fruit juice, sugar, glucose syrup	100% fruit juice reconstituted from concentrates and pulps. Product contents in order of proportions: apple juice, orange juice, pineapple juice, apricot pulp, grape juice, lemon juice, banana pulp, passion fruit juice, mango pulp, guava pulp, cacaya pulp, kiwi juice, with 10 vitamins, preserves
Brix	13.0	12.5
SRD 4 Panel Taste Preference (1-10 scale all fruit juices)	8	7.5
Shelf Life in Months from POP	10	11


Vitamingehalt je 100 ml: Teneur en vitamines pour

Vitamin C/Vitamine C	30,0 mg*
Niacin/Niacine	9,0 mg*
Vitamin E/Vitamine E	5,0 mg*
Pantothensäure/Acide pantothénique	3,0 mg*
Vitamin B6/Vitamine B6	1,0 mg*
Vitamin B1/Vitamine B1	0,7 mg*
Vitamin A**/Vitamine A**	400 µg*
Folsäure/Acide folique	100 µg*
Biotin/Biotine	0,075 mg*
Vitamin B12/Vitamine B12	0,5 µg*

* 50% der empfohlenen Tagesdosis
* 50% de la dose journalière recommandée
** umgerechnet aus dem Provitamin A
** calculée à base de provitamine A

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Emig AG
D-25462 Rellingen

0 ml:

100 ml enthalten durchschnittlich:
Brennwert 207 kJ = 48 kcal,
Eiweiß 0,4 g, Kohlenhydrate 10,8 g,
Fett 0,2 g. 1 BE = 111 ml.

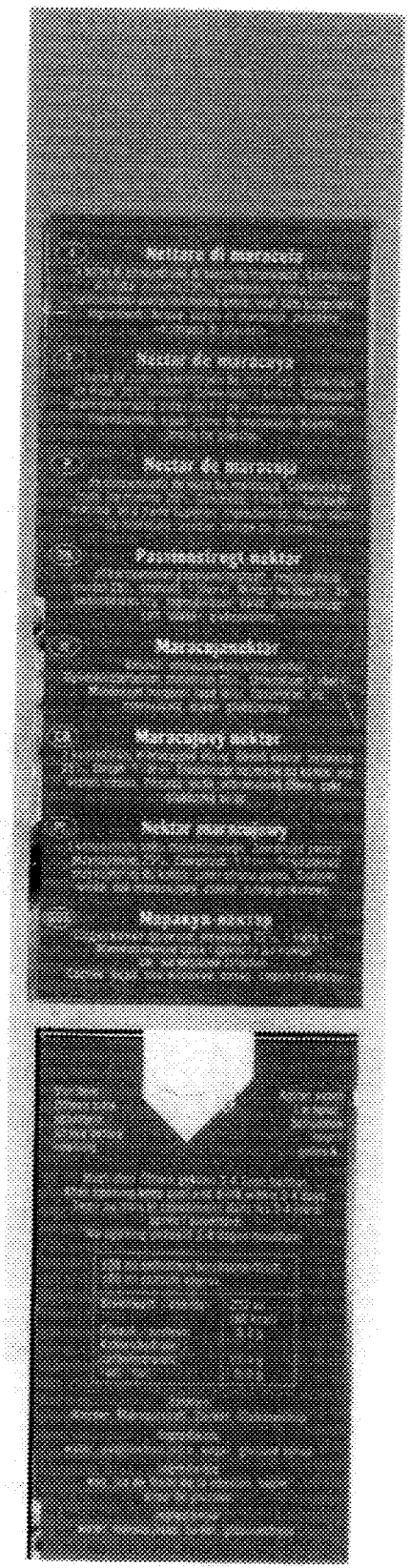
100 ml contiennent en moyenne:
valeur énergétique 207 kJ = 48 kcal,
protéines 0,4 g, glucides 10,8 g,
lipides 0,2 g. 1 unité pain = 111 ml.

Fabriqué en Allemagne

Zutaten: Apfel-, Orangen-, Ananassaft, Aprikosenmark, Trauben-, Zitronensaft, Bananenmark, Marakujasaft, Mango-, Guaven-, Papayamark, Kiwisaft, Vitamin C, Niacin, Vitamin E, Pantothenat, Provitamin A, Vitamin B6, Vitamin B1, Folsäure, Biotin, Vitamin B12

Ingrédients: jus de pomme, -d'orange, -d'ananas, pulpe d'abricot, jus de raisin, -de citron, pulpe de banane, jus de fruit de la passion, pulpe de mangue, -de goyave, -de papaye, jus de kiwi, vitamine C, niacine, vitamine E, pantothénate, provitamine A, vitamine B6, vitamine B1, acide folique, biotine, vitamine B12

CLASSIC
Kings
fruit-drinks
Nectar de fruits
de la passion
Maracujanektar



CLASSIC
Krings
fruit-drinks
Nectar de fruits
de la passion
Maracujanektar

PART THREE: BUYER INTELLIGENCE BRIEFS: KAUFLAND, LIDL, ALDI, & KUPSCH

6. Kaufland: Hypermarket Buyer Brief

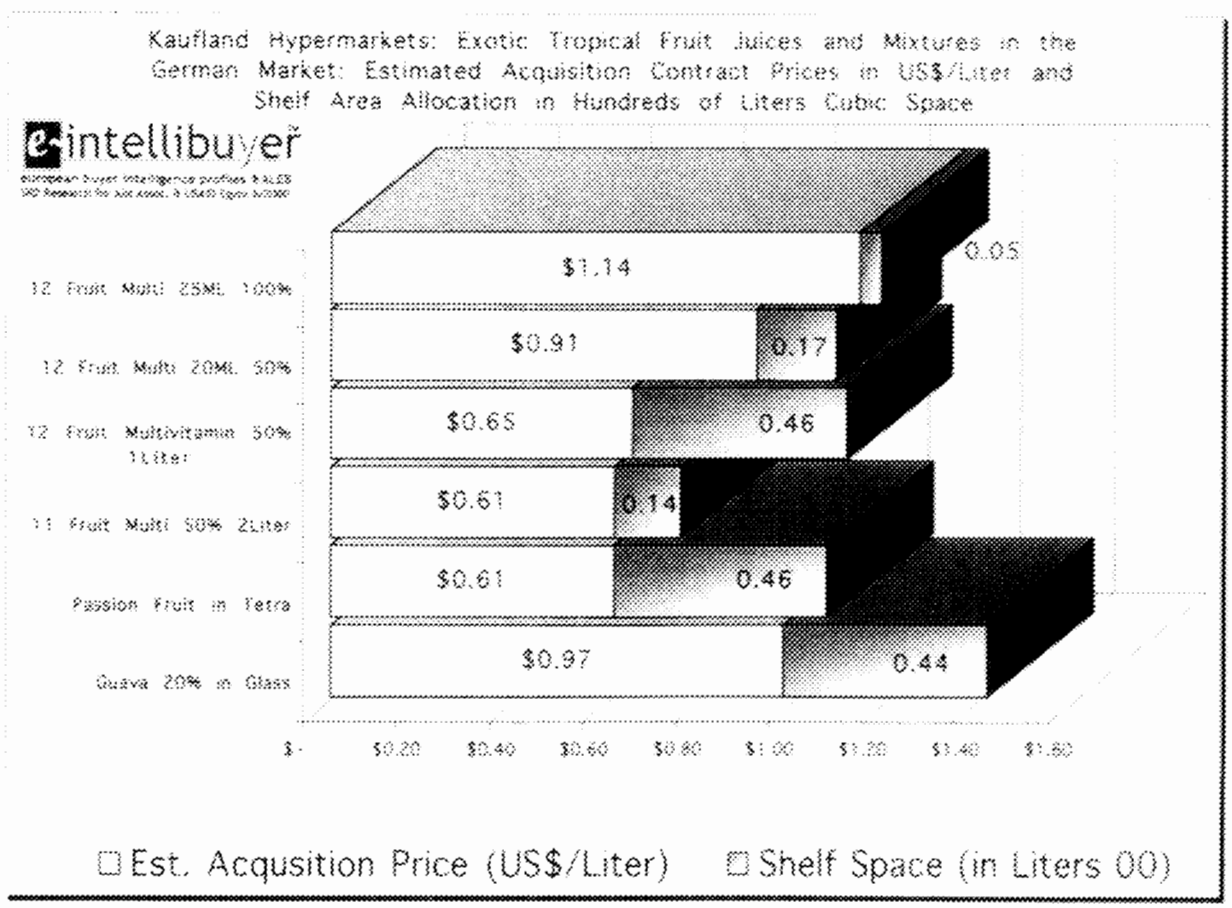
a. Estimated Buyer Acquisition Contract Prices for Hypermarkets

The graph opposite presents the SRD/*e-intellimarc* estimates of the acquisition contract price paid and shelf space allocated on average by hypermarket chains for each major product type and package size. The acquisition price estimates do not measure a specific transaction. They are intended only as general guidelines based on estimated margins and import product costs.

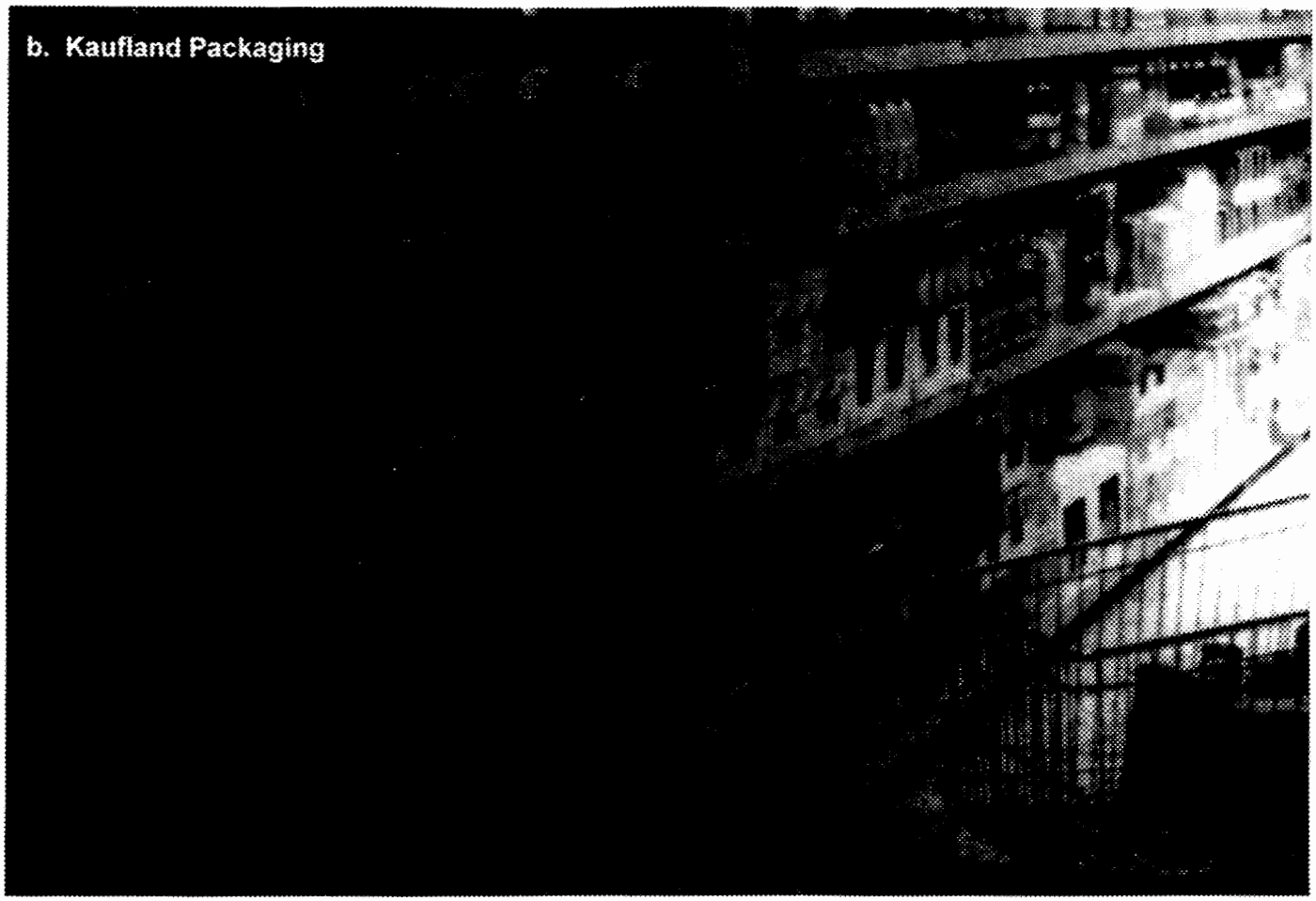
The acquisition price estimates by package size and type can give potential exporters a more refined idea of the quality and price relationships in the German market place and assist in developing concrete feasibility studies and export business plans. Retail chains do not release their actual acquisition contract pricing for public information. These estimates are based on SRD's best secondary information on

retail to acquisition margins, applied to direct measurements of actual retail sales prices. They should be used only as preliminary indicators, and must be confirmed through actual market tests and direct negotiations with buyers.

The table on the next page provides more precise details on pricing, packaging and product specifications for each product and package type.

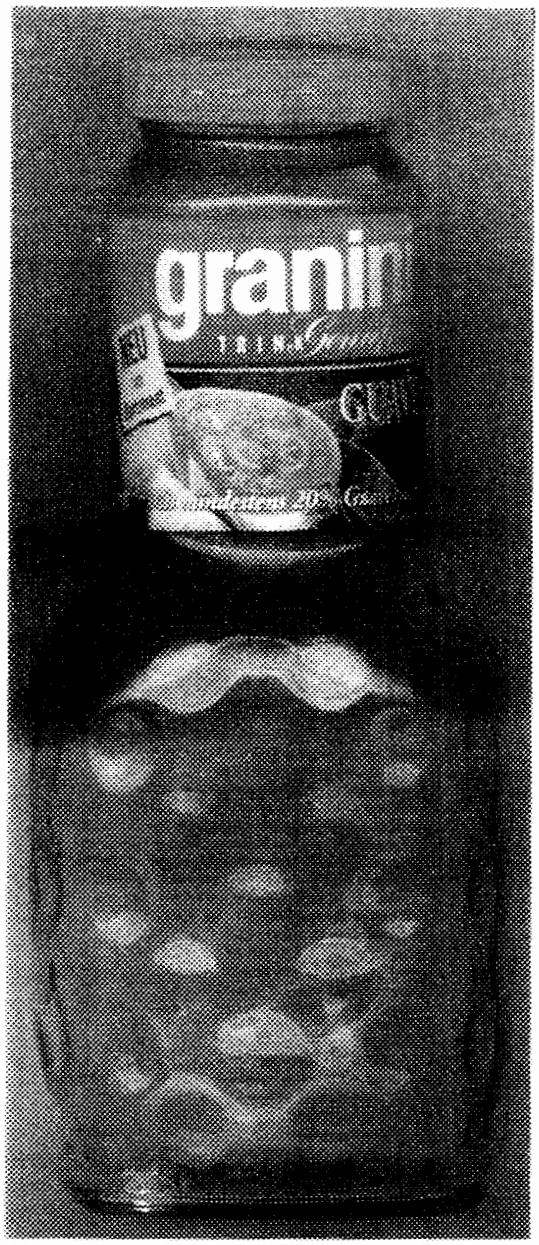


b. Kaufland Packaging

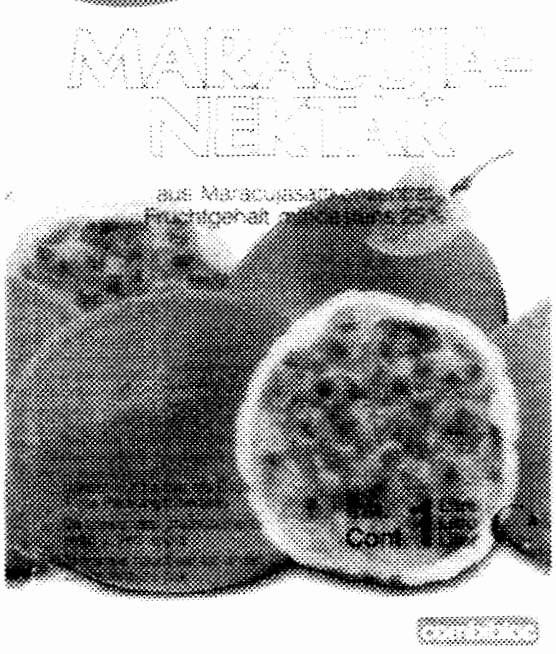


Store Facia and parent			Kaufl
Product Type	Guava Juice 20%	Passion Nectar 25%	11 Fruit Multivitamin 50%
Brand	Granima	Hardthof	Pfanner
Net Contents (Liters)	0.75	1.00	2.00
Package Type	Glass	Tetra Fol	Tetra Fol
Height cm	19	16.8	20.7
Width cm (or diameter if cylindrical)	9.1	9.5	9.2
Depth cm (or diameter if cylindrical)	9.1	6.0	9.2
Shelf Space (Cubic Centimeters)	44,055	45,965	14,016
Price Local Currency (DM)	1.79	1.49	2.99
Price in USD Retail per Package	$0.82	$0.68	$1.37
USD/Liter of Single Strength Equivalent	$1.10	$0.68	$0.69
Estimated 2000 Retailer Acquisition Contract Price			
US$/Package	$0.73	$0.51	$1.22
US$/Liter of Single Strength Equivalent	$0.97	$0.61	$0.61
Estimated Packaging Specifications (reverse engineered)	Clear glass with screw top cap. Custom modeled glassware 9.1cm at base, expanding to 9.8cm a 6cm height. 4.8cm diameter neck of 6.2 cm length embossed by a 4 color OMPK sep print label on 33lb. Chromecoat. Glass gage 3.5 cm, top opening 4 cm diameter.	Foilbacked Tetra short rectangle format with screw or metal opening. Carton 18lines, foils 1mm, film 0.2mm, 4 color OMK sep print w/ wax coat	Foilbacked Tetra Milk Carton tent top format w Screw Opening. Carton 18lines, Foils 1.2mm, Film 0.2mm. 4 Color OMPK sep print w/wax
Product Specifications	20% guava juice reconstituted from guava pulp. Product content in order of proportions: water, guava pulp, sugar, lime juice, Boysenberry juice, pectin	25% passion fruit juice reconstituted from concentrate. Product content in order of proportions: water, passionfruit juice, glucose syrup, sugar	50% fruit content multivitamin juice reconstituted from purees and concentrates. Product content in order of proportions: water, apple and pineapple juice concentrates, apricot and peach purees, grape, orange passionfruit and pear juice concentrates, banana, guava and mango purees, sugar, acid and vitamins
Brix	14.3	15.3	11.0
SRD 4 Panel Taste Preference (1-10 scale all fruit jui	9	7	4
Shelf Life in Months from POP	10	11	11.5

Store Facia and parent	Iand Facia, Lidl & Schwarz Owner			
Product Type	12 Fruit Multivitamin 50%	12 Fruit Multivitamin 50%	Fruit Multivitamin 100%	Average
Brand	Hardthof	Hardthof	WeserGold	
Net Contents (Liters)	1.00	0.20	0.25	0.87
Package Type	Tetra Fol	Tetra Fol	Tetra Fol	
Height cm	19.2	8.7	13.0	16.7
Width cm (or diameter if cylindrical)	7.0	6.0	8.0	7.6
Depth cm (or diameter if cylindrical)	7.0	7.6	3.5	6.4
Shelf Space (Cubic Centimeters)	45,158	17,004	4,550	28,438
Price Local Currency (DM)	2.99	0.69	0.99	$1.82
Price in USD Retail per Package	$1.37	$0.32	$0.45	$0.84
USD/Liter of Single Strength Equivalent	$1.37	$1.58	$1.82	$1.21
Estimated 2000 Retailer Acquisition Contract Price				
US$/Package	$1.22	$0.28	$0.40	$0.74
US$/Liter of Single Strength Equivalent	$1.22	$1.41	$1.61	$1.07
Estimated Packaging Specifications (reverse engineered)	Foilbacked Tetra short rectangle format with screw or combi opening, Carton: 35mm, folds: 1mm, film: 32mm, 4 color OPTX wag print w/ wax coat	Foilbacked Tetra wage opening, 20, short rectangle format with attached plastic screw and foil covered straw-hole, Carton: 35mm, folds: 1mm, film: 35mm, 4 color OPTX wag print w/ wax coat	Foilbacked Tetra wage opening 25ts, tall rectangle format with attached plastic screw and foil covered straw-hole, Carton: 35mm, folds: 1mm, film: 35mm, 4 color OPTX wag print w/ wax coat	
Product Specifications	50% 12 fruit content multivitamin juice reconstituted from purees and concentrates. Product content in order of proportions: water, apple, orange and pineapple juice concentrates, apricot pulp, lemon, grapefruit, and passionfruit juice concentrates, banana, mango and guava purees, grape and kiwifruit juice concentrates, carbohydrates, sugar and vitamins.	50% 12 fruit content multivitamin juice reconstituted from purees and concentrates. Product content in order of proportions: water, apple, orange and pineapple juice concentrates, apricot pulp, lemon, grapefruit, and passionfruit juice concentrates, banana, mango and guava purees, grape and kiwifruit juice concentrates, carbohydrates, sugar and vitamins.	100% 12 fruit content multivitamin juice reconstituted from purees and concentrates. Product content in order of proportions: apple, orange, pear, pineapple, grape, passion fruit and lemon juice concentrates, banana, nectarine, mango, guava and papaya purees, and vitamins.	
Box	16.5	16.5	16.5	16.5
SKU 4 Panel Taste Preference (1-10 scale all fruit juic	5.4	5.4	3.4	6.0
Shelf Life in Months from POP	9.0	9.0	9.0	9.0


granin

MARACUJA-NEKTAR
Hardthof


NEKTAR

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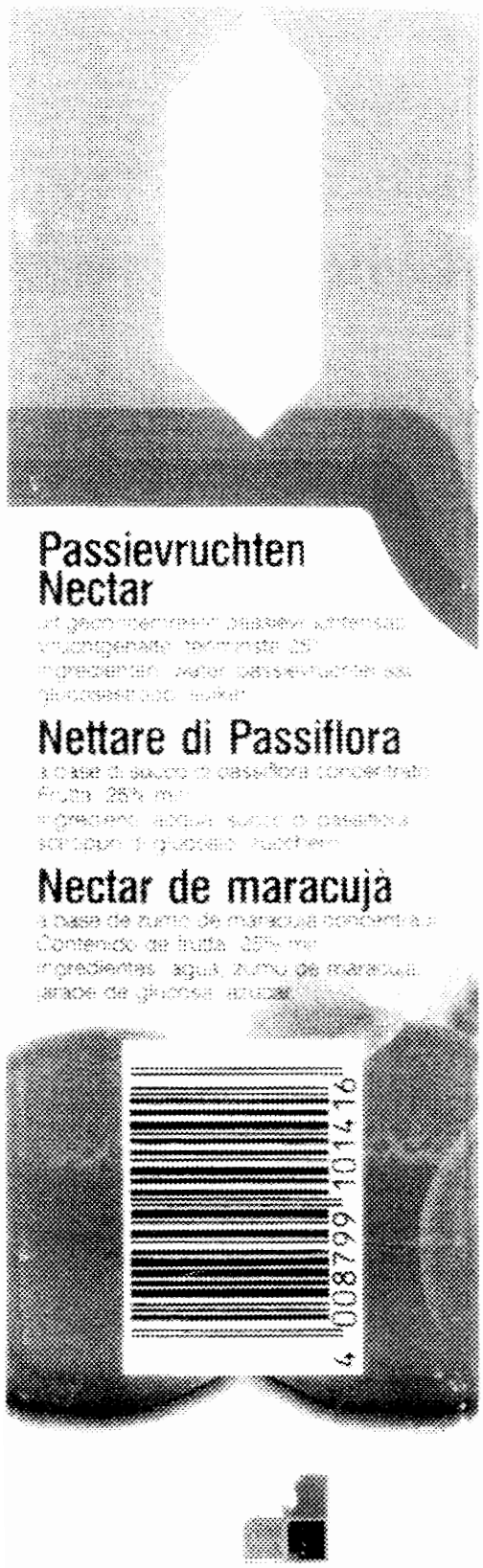
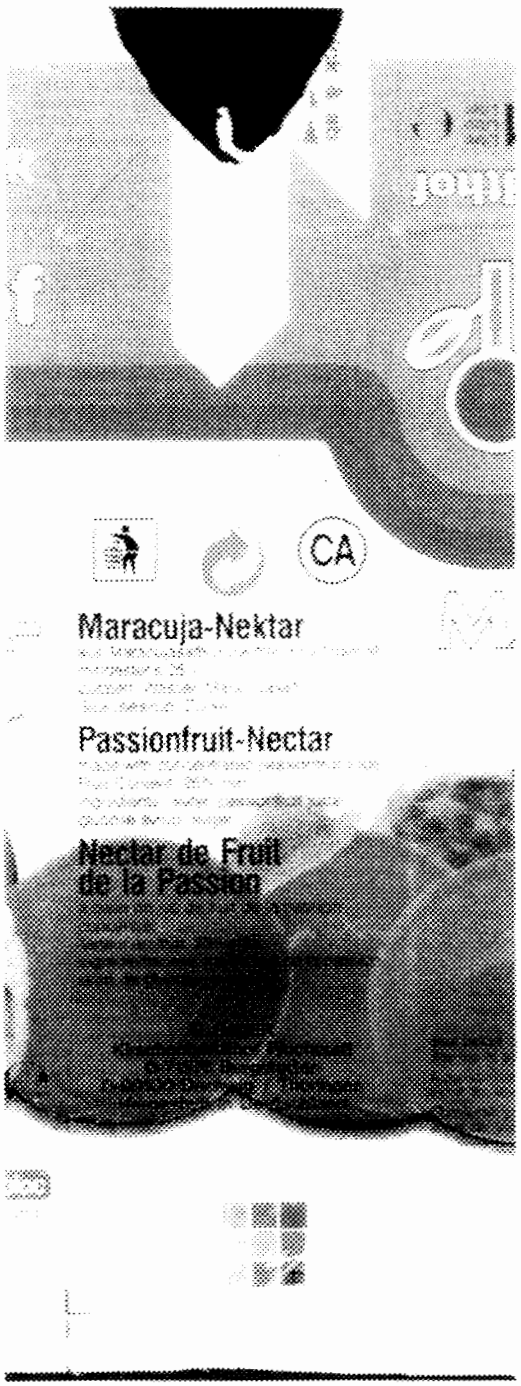
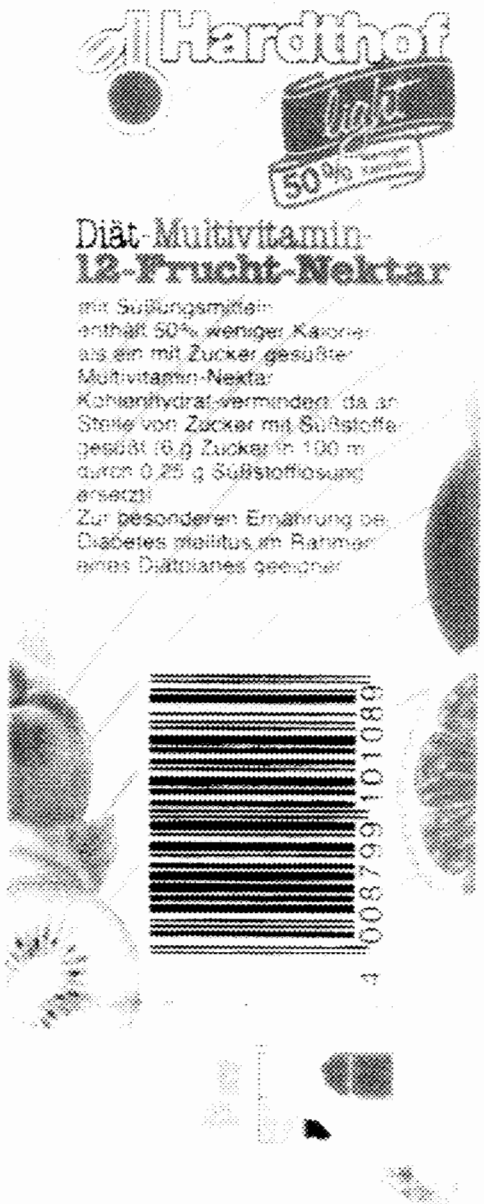
Guave-Fruchtsaftgehalt


Passievruchten
Nectar
Nettare di Passiflora
Nectar de maracujà
4 008799 101416


CA
Maracuja-Nektar
Passionfruit-Nectar
Nectar de Fruit
de la Passion

Diät-Multivitamin-
12-Frucht-Nektar
Hardthof
Light
50%
Diät-
Multivitamin-
12-Frucht-Nektar
e 1 L
Diät-Multivitamin-
12-Frucht-Nektar
Hardthof Fruchtsaft GmbH & Co
D-71576 Burgstetten
Hergestellt in Deutschland


Hardthof
light
50%
Diät-Multivitamin-
12-Frucht-Nektar
4 008799 101089

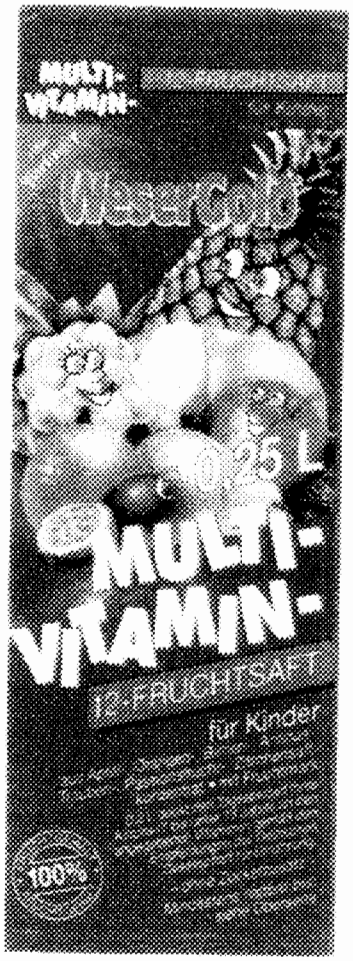
2 LITER
Vor dem Öffnen gut schütteln.
ó Pfanner
Multivitamin
Nektar
MIT 8 VITAMINEN
UND 1 PROVITAMIN
2,0 L

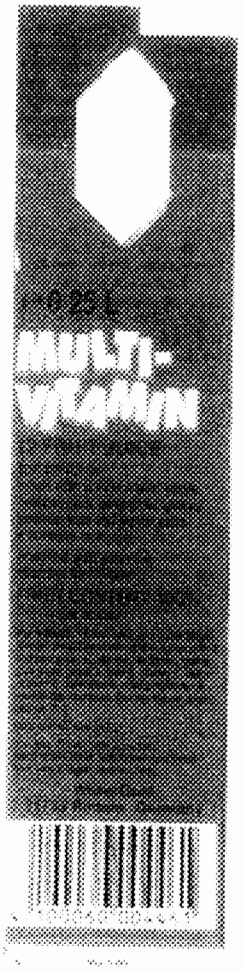
MULTIVITAMIN MEHRFRUCHT NEKTAR

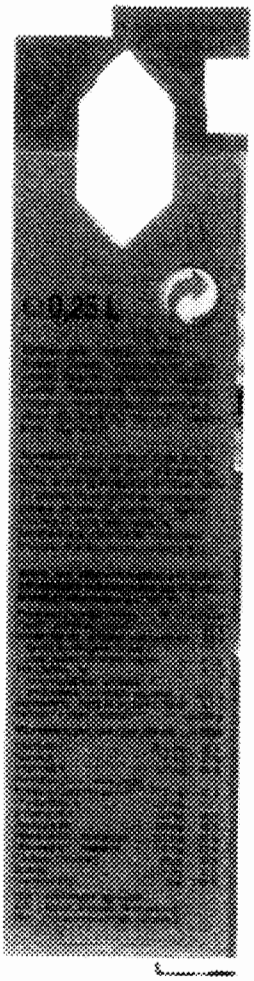
NETTARE MULTIVITAMINICO DI PIÙ FRUTTI

MIXED FRUIT NECTAR WITH VITAMINS

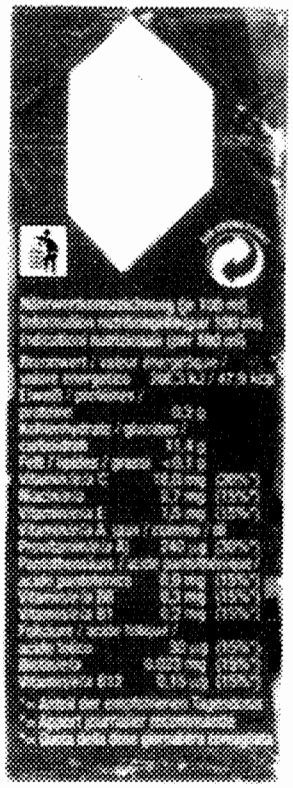
MULTIVITAMÍNOVÝ NEKTAR


MULTI-
VITAMIN-
0,25 L
MULTI-
VITAMIN-
12-FRUCHTSAFT
für Kinder
100%


0,25 L
MULTI-
VITAMIN


0,25 L

12-FRUCHT-NEKTAR
Hardthof
12-FRUCHT-NEKTAR
0,2 l



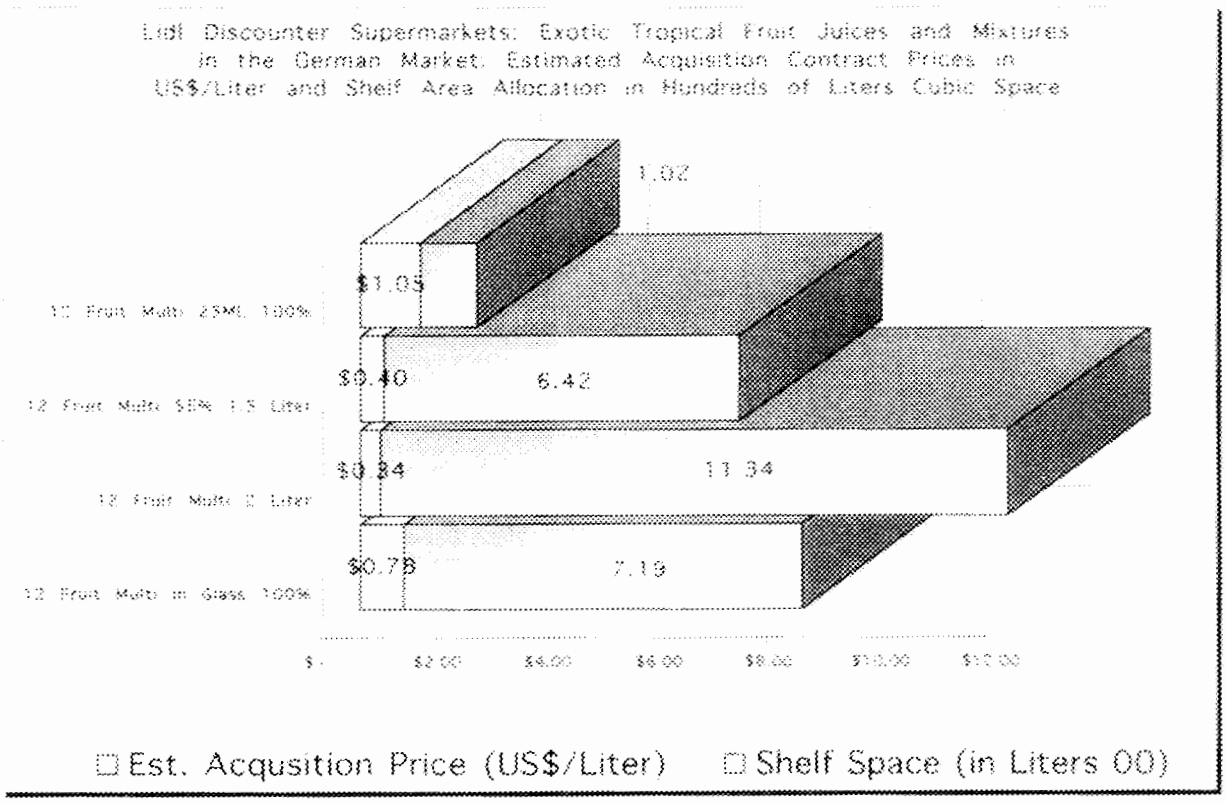
Nettare di 12 frutti

7.Lidl and Aldi: Discounter Buyer Briefs

a. Lidl Estimated Buyer Acquisition Contract Prices and Shelf Space Allocation

The graph opposite presents the SRD/*e-intellimarc* estimates of the acquisition contract price paid and shelf space allocated on average by the discounter supermarket chain, Lidl, for each major exotic tropical juice product type and package size. The acquisition price estimates do not measure a specific transaction. They are intended only as general guidelines based on estimated margins and import product costs.

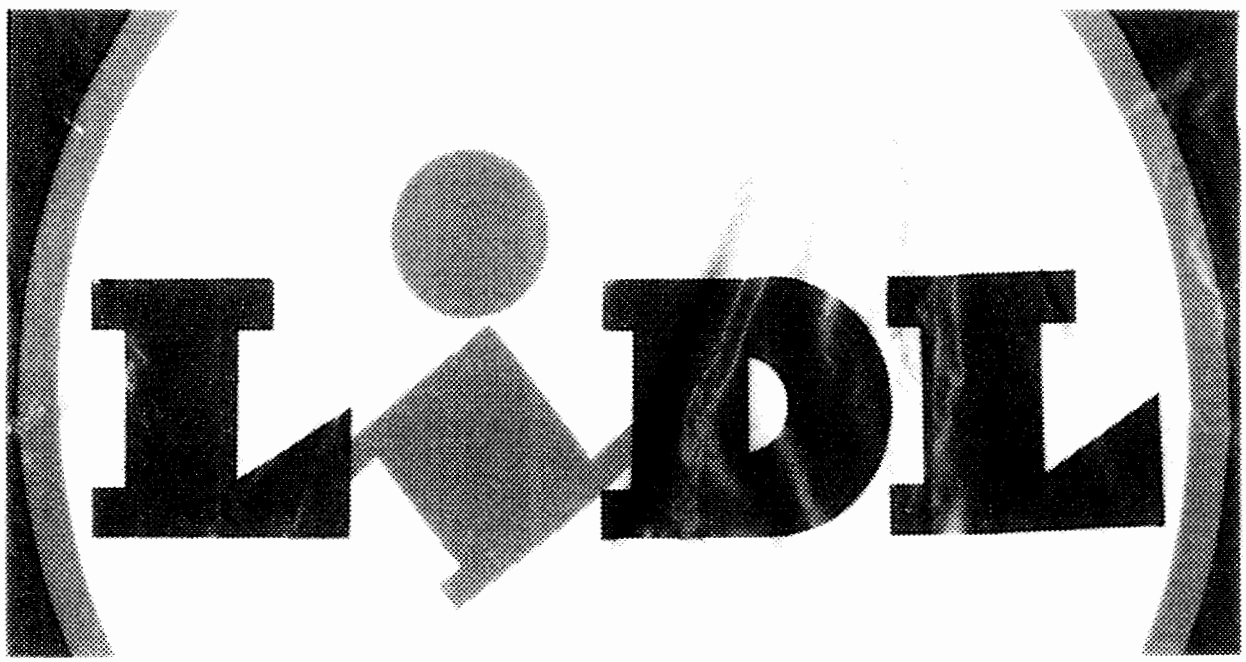
The acquisition price estimates by package size and type can give potential exporters a more refined idea of the quality and price



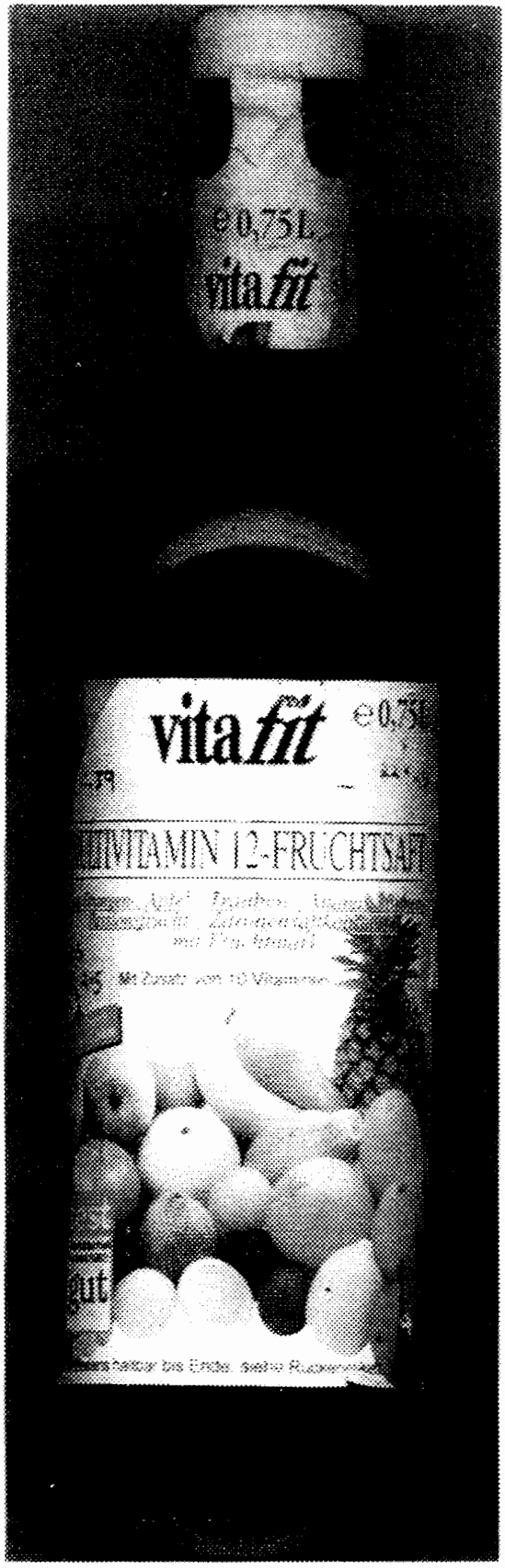
relationships in the German market place and assist in developing concrete feasibility studies and export business plans. Retail chains do not release their actual acquisition contract pricing for public information. These estimates are based on SRD's best secondary information on retail-to-acquisition margins, applied to direct measurements of actual retail sales prices. They should be used only as preliminary indicators, and must be confirmed through actual market tests and direct negotiations with buyers.

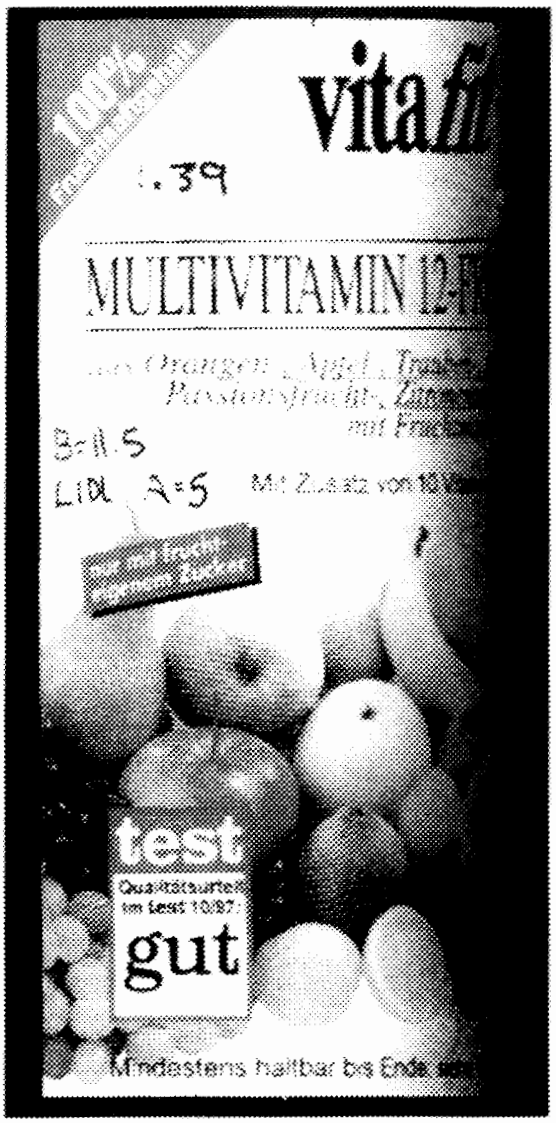
b. Lidl Pricing, Packaging and Product Specifications

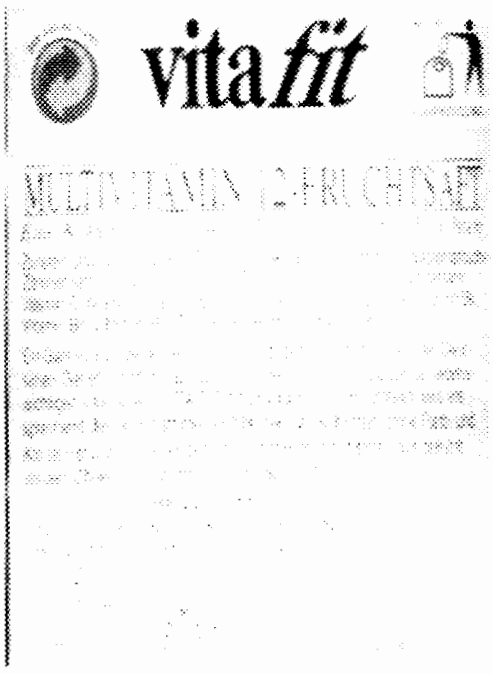
The table below provides more precise details on pricing, packaging and product specifications for each product and package type. The images which follow on subsequent pages provide additional detail on product and packaging specifications.



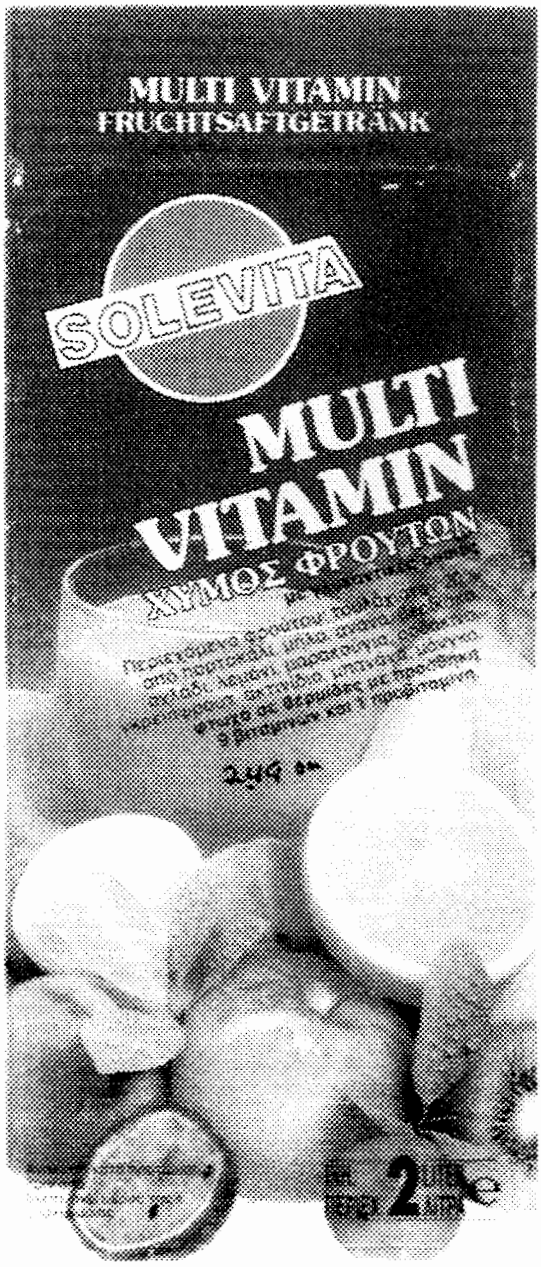
Store Facts and period	Lidl Facts: Owner Lidl and Schwarz Group				
Product Type	Fruit Nectar/water 100% 12	Fruit Nectar/water 50%	12 Fruit Nectar 55%	12 Fruit Nectar 100%	Average
Brand	Vitalife	Solevita	Solevita	Solevita	
Net Contents (Liters)	0.75	2.00	1.50	0.75	1.13
Package Type	Brown Glass	Tetra Pak	Tetra Pak	Tetra Pak	
Height cm	27.5	23.5	22.5	13.0	21.7
Width cm (or diameter if cylindrical)	7.0	11.0	9.0	6.0	8.0
Depth cm (or diameter if cylindrical)	7.0	7.0	6.4	3.0	6.1
Shelf Space (Cubic Centimeters)	718,242	1,133,693	641,520	102,870	649,047
Price Local Currency (DM)	1.09	1.69	1.49	0.5475	1.20
Price in USD Retail per Package	$0.54	$0.79	$0.68	$0.30	$0.60
USD/Liter of Single Strength Equivalent	$0.85	$0.39	$0.46	$1.19	$0.72
Estimated DSGV Retailer Acquisition Contract Price					
US$/Package	$0.49	$0.69	$0.61	$0.26	$0.54
US$/Liter of Single Strength Equivalent	$0.79	$0.34	$0.40	$1.05	$0.63
Estimated Packaging Specifications (inferred engineered)	Brown Glass with screw top. Base Tetra Brandy. 5.8mm glass thickness. Mouth opening 2.5cm. Two labels at 1 euro (DM) sale price or 20 % discount. Rear label with three spot color printing in 20 % Dominoes.	Foldboxed Tetra Pak rectangle formed w/ cones opening Cartons 3.0cm, top, 1cm, Bottom 4 color (DM) sale price w/ less cost	Foldboxed Tetra Pak rectangle formed w/ cones opening Cartons 3.0cm, top, 1cm, Bottom 4 color (DM) sale price w/ less cost	Foldboxed Tetra single serving. 12L Lid rectangle formed w/ a rectangular shape, where you find opened screw hole. Cartons 3.0cm, top, 1cm, Bottom 4 color (DM) sale price w/ less cost	
e-intellibuyer worldwide buyer intelligence provided by A.C.E.S. Inc. Guadalupe, CA, USA, 8.19.2000 Copyright A.C.E.S.	100% fruit juice concentrates from concentrates and water. Product contains a mixture of proportions apple, grape, pear, concentrates, lemon juice, orange, plum, cherry, peach and 10 minor additives.	50% 12 fruit juices reconstituted juice concentrates from purees and concentrates. Product contains not necessarily a mixture of proportions after water, water, orange, apple, pineapple, lemon juice, lemon concentrate, plum, grapefruit, pear, cherry, mango and our vitamins.	55% 12 fruit contain multivitamin juice reconstituted from purees and concentrates. Product contains a mixture of proportions water, apple, and orange juice concentrates, lemon puree, mango, grapefruit, and passion fruit juice concentrates, cherry, mango and guava purees, guava and kiwi fruit juice concentrates, concentrate sugar and our vitamins.	100% 12 fruit juices reconstituted juice reconstituted from purees and concentrates. Product contains a mixture of proportions orange, apple, grape, pineapple, pear, passion fruit and lemon juice concentrates, guava, mango, kiwi, cherry and passion fruit juices and our vitamins.	
Product Specifications					
SKU	11.5	16.1	11.5	11.5	12.3
SKU + Retail Space (Reference 1.0 = 1.0 equal to floor size)	0.5	0.4	0.1	0.72	0.5
Shelf Life in Months from DOP	12	9.0	12.0	12.0	11.5

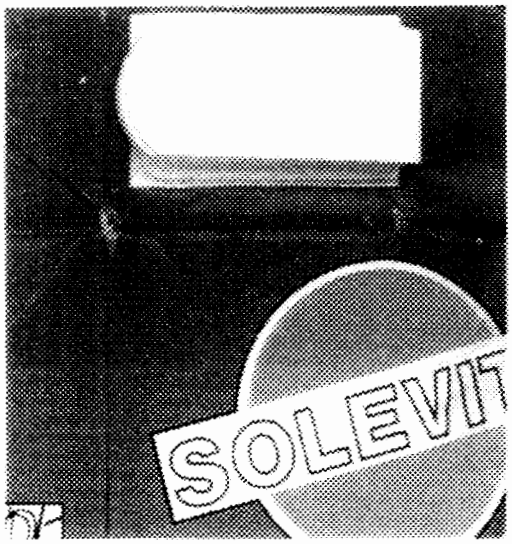

e 0,75 L
vitafit
vitafit
MULTIVITAMIN 12-FRUCHTSAFT

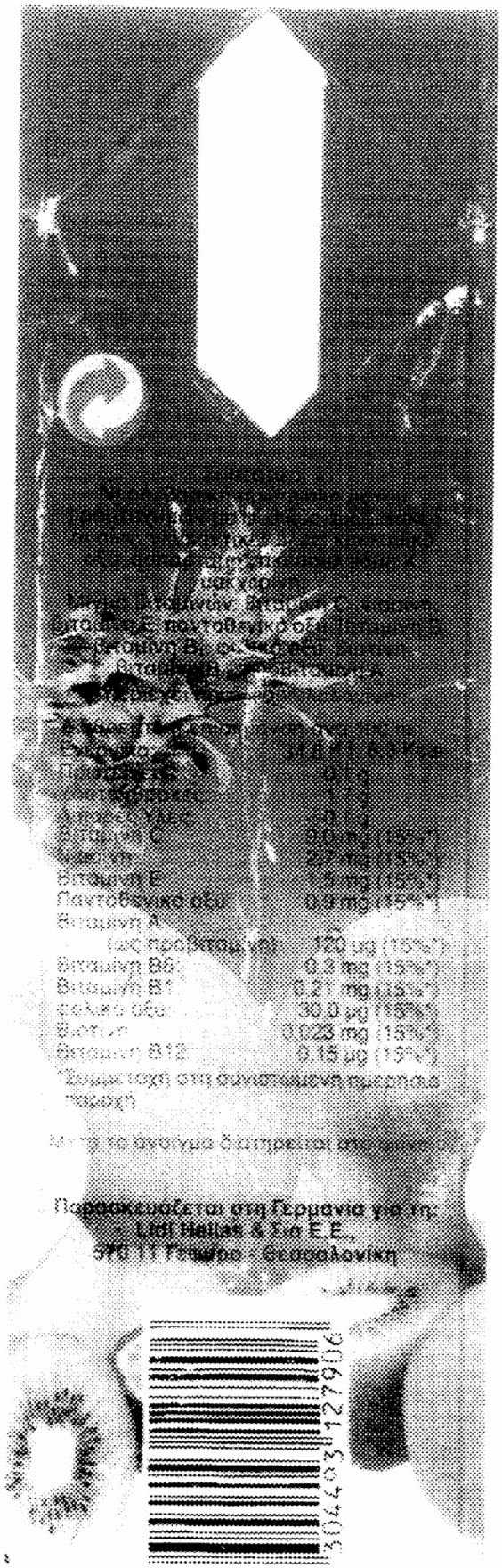

vitafit
1.39
MULTIVITAMIN 12-
B-11.5
LIDL A-5
test
gut

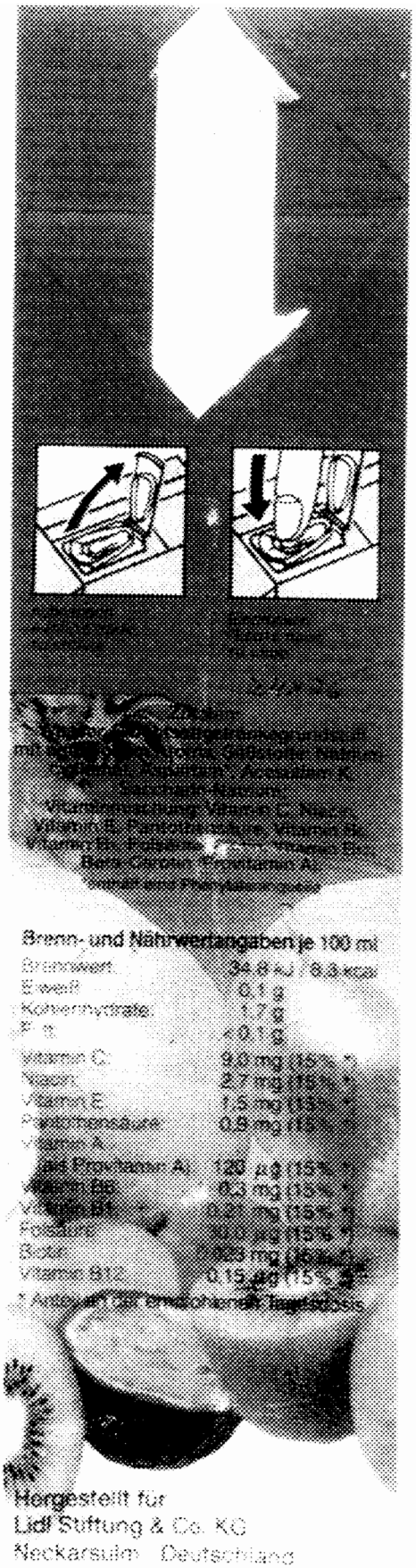

vitafit

vita fit
0,75L
TAMIN 12-FRUCHTSAFT

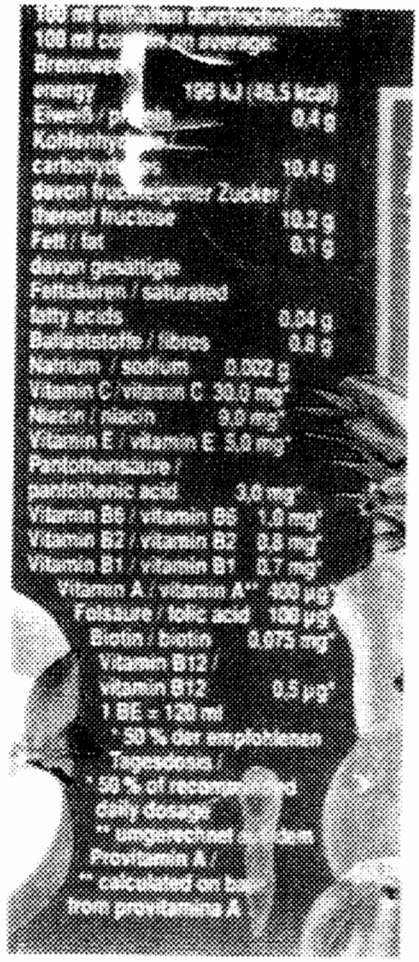

MULTI VITAMIN
FRUCHTSAFTGETRÄNK
SOLEVITA
MULTI
VITAMIN
ΧΥΜΟΣ ΦΡΟΥΤΩΝ
2,99


SOLEVIT


Βιταμίνη C
Βιταμίνη E
Παντοθενικό οξύ
Βιταμίνη A
Βιταμίνη B6
Βιταμίνη B1
Βιτίνη
Βιταμίνη B12
Παρασκευάζεται στη Γερμανία για τη:
Lidl Hellas & Σία Ε.Ε.,
3046031127906

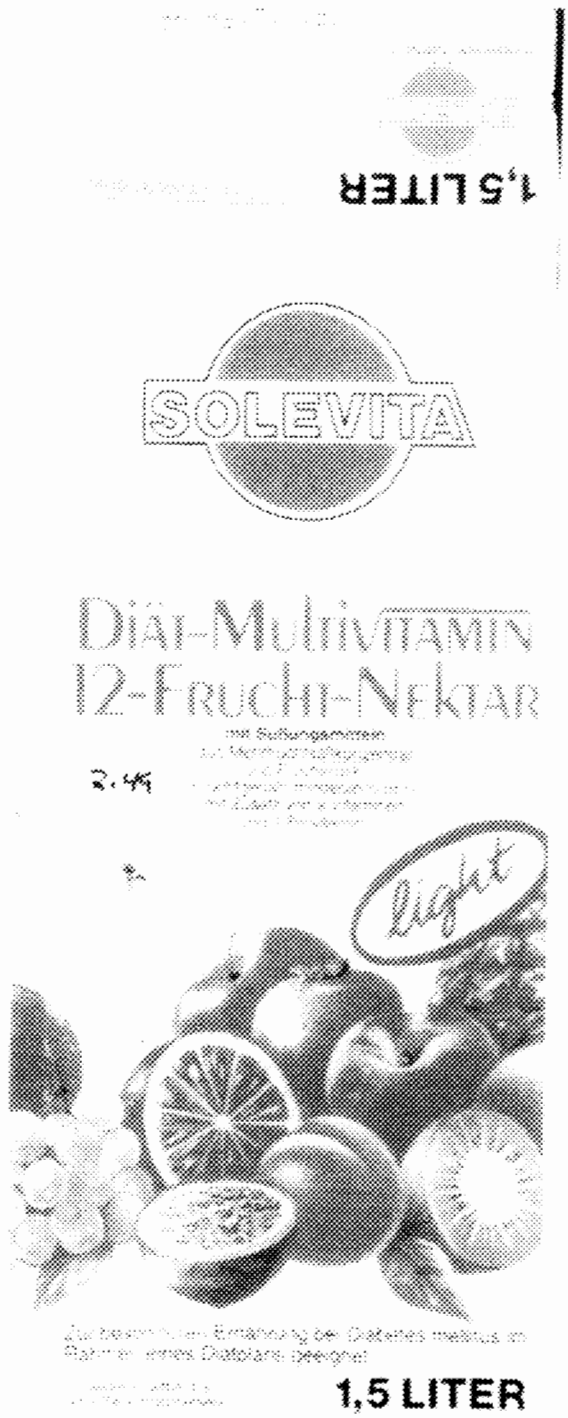

Brenn- und Nährwertangaben je 100 ml
Brennwert
Eiweiß
Kohlenhydrate
Vitamin C
Vitamin E
Pantothensäure
Vitamin A
Vitamin B6
Vitamin B1
Biotin
Vitamin B12
Hergestellt für
Lidl Stiftung & Co. KG
Neckarsulm Deutschland

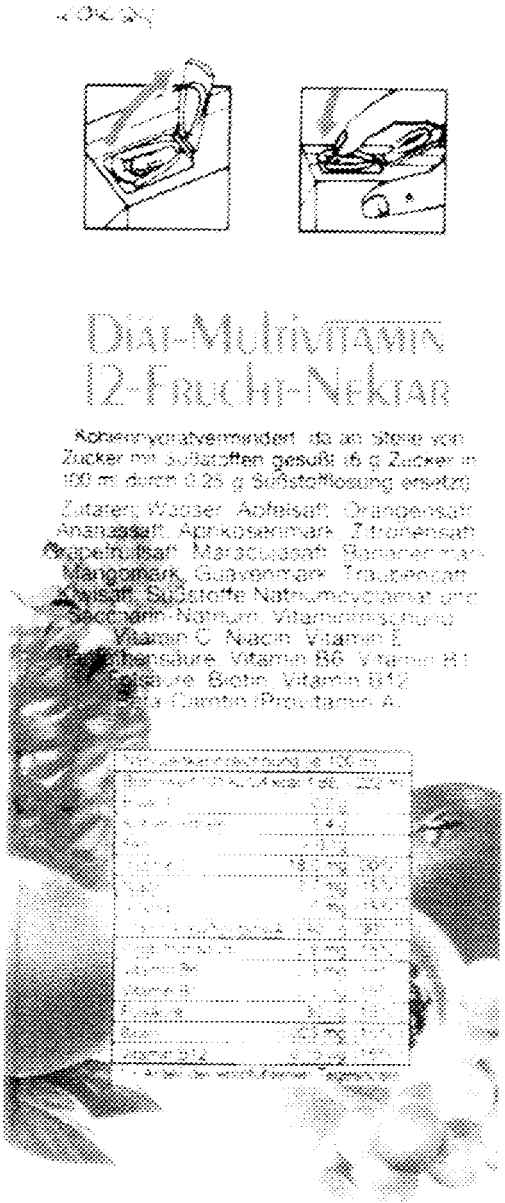
SOLEVITA
Multivitamin
12-Fruit Juice
from concentrated orange-, apple-, grape-, pineapple-, pear-, maracuja- and lemon juice with fruit puree
10 vitamins added
2.29
Fruit content 100%
0,25 l
A= 6.75


100 ml enthalten durchschnittlich:
100 ml contain on average:
Brennwert
energy 196 kJ (46.5 kcal)
Eiweiß / protein 0.4 g
Kohlenhydrate /
carbohydrates 10.4 g
davon fruchteigener Zucker /
thereof fructose 10.2 g
Fett / fat 0.1 g
davon gesättigte
Fettsäuren / saturated
fatty acids 0.04 g
Ballaststoffe / fibres 0.8 g
Natrium / sodium 0.002 g
Vitamin C / vitamin C 30.0 mg*
Niacin / niacin 9.0 mg*
Vitamin E / vitamin E 5.0 mg*
Pantothensäure /
pantothenic acid 3.0 mg*
Vitamin B6 / vitamin B6 1.0 mg*
Vitamin B2 / vitamin B2 0.8 mg*
Vitamin B1 / vitamin B1 0.7 mg*
Vitamin A / vitamin A** 400 µg*
Folsäure / folic acid 100 µg*
Biotin / biotin 0.075 mg*
Vitamin B12 /
vitamin B12 0.5 µg*
1 BE = 120 ml
* 50 % der empfohlenen
Tagesdosis /
* 50 % of recommended
daily dosage
** umgerechnet auf dem
Provitamin A /
** calculated on ba
from provitamina A

Zutaten: Orangen-, Apfel-, Trauben-, Ananas-, Birnen-, Passionsfrucht-, Zitronensaft, Guaven-, Mango-, Pfirsich-, Bananen-, Papayamark, Vitamin C, Niacin, Vitamin E, Pantothenat, Provitamin A, Vitamin B6, Vitamin B2, Vitamin B1, Folsäure, Biotin, Vitamin B12
Ingredients: Orange-, apple-, grape-, pineapple-, pear-, maracuja-, lemon juice, guave-, mango-, peach-, banana-, papaya puree, vitamin C, niacin, vitamin E, pantothenic acid, provitamin A, vitamin B6, vitamin B2, vitamin B1, folic acid, biotin, vitamin B12
Bitte vor dem Öffnen schütteln!
Nach dem Öffnen kühl aufbewahren und innerhalb von 3-4 Tagen verbrauchen.
Shake well before opening!
Once opened, keep refrigerated and consume within 3-4 days.
Hergestellt für:
Lidl Stiftung & Co. KG
D-74172 Neckarsulm
Lidl Austria GmbH
Pf 9, A-5014 Salzburg
Specially made for:
Lidl UK GmbH - 19,
Worple Road
London - SW 19 4JS

aus Mehrfruchtsaftkonzentrat und Fruchtmark
SOLEVITA
DIÄT-MULTIVITAMIN
12-FRUCHT-NEKTAR
light
1,5 LITER

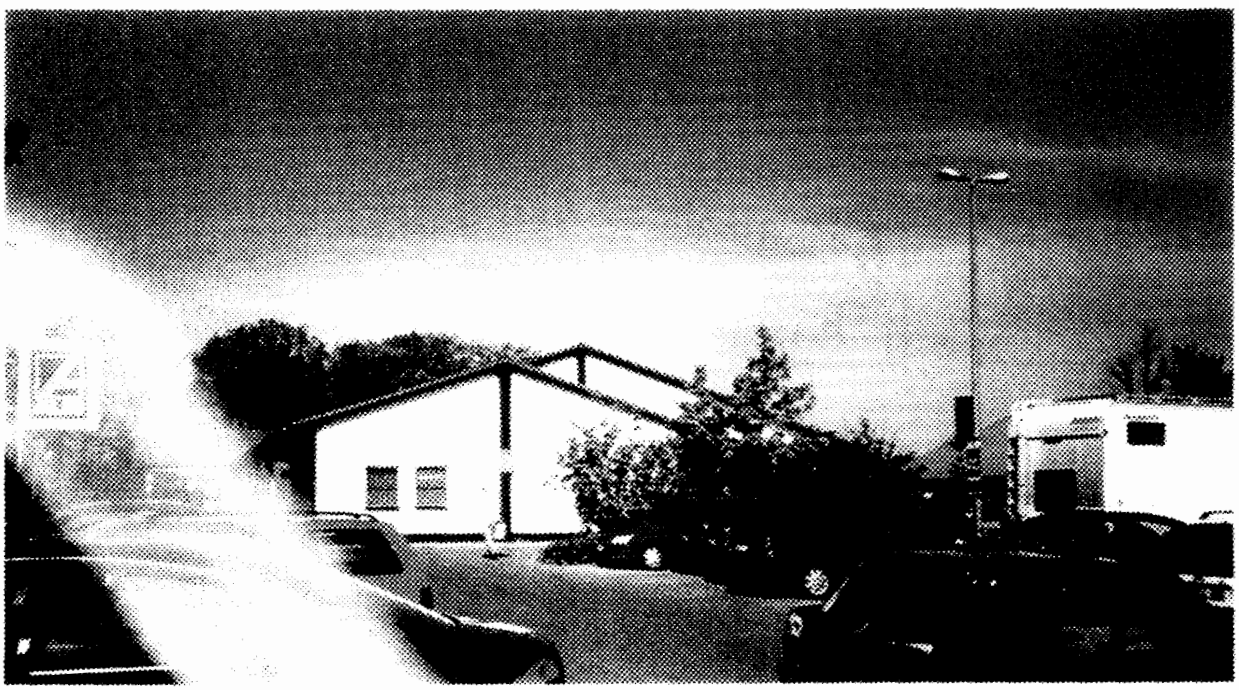

1,5 LITER
SOLEVITA
DIÄT-MULTIVITAMIN
12-FRUCHT-NEKTAR
light
1,5 LITER


DIAI-MULTIVITAMIN
12-FRUCHT-NEKTAR
Wiederverwertbare Verpackung
DER GRÜNE PUNKT

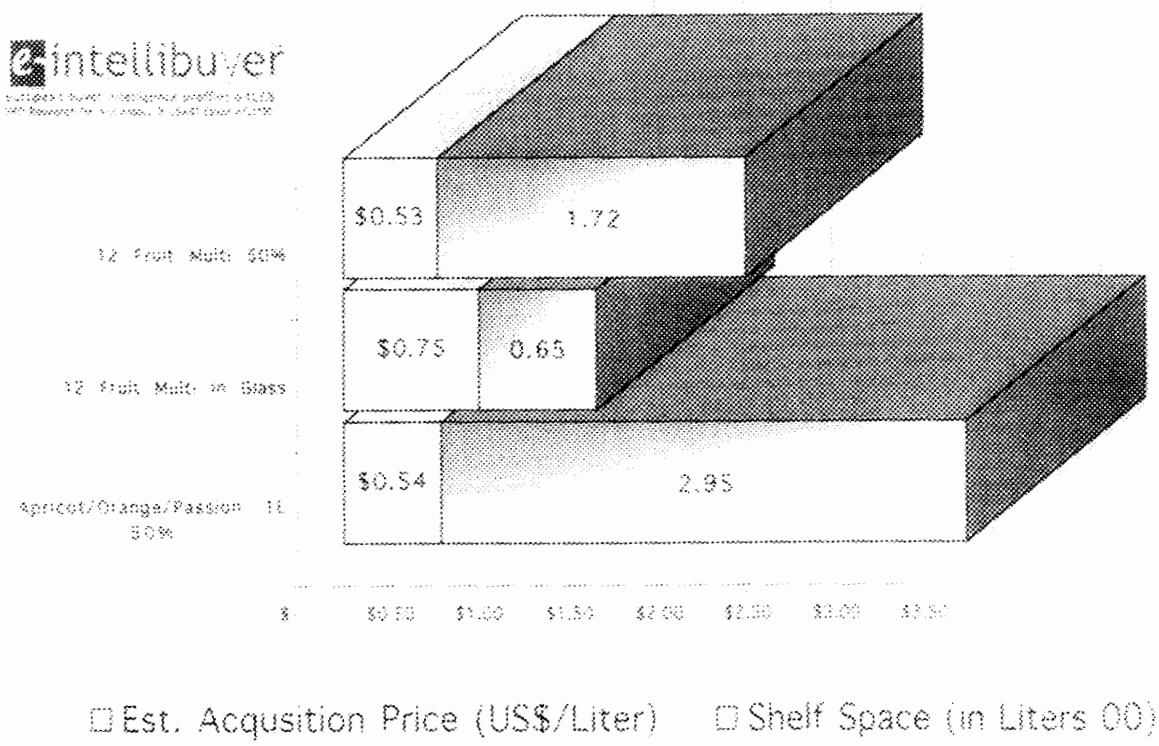
c. Aldi Estimated Buyer Acquisition Contract Prices and Shelf Space Allocation

The graph opposite presents the SRD/*e-intellimarc* estimates of the acquisition contract price paid and shelf space allocated on average by the discounter supermarket chain, Aldi, for each major exotic tropical juice product type and package size. The acquisition price estimates do not measure a specific transaction. They are intended only as general guidelines based on estimated margins and import product costs.

The acquisition price estimates by package size and type can give potential exporters a more refined idea of the quality and price



Aldi Discounter Supermarkets: Exotic Tropical Fruit Juices and Mixtures in the German Market: Estimated Acquisition Contract Prices in US$/Liter and Shelf Area Allocation in Hundreds of Liters Cubic Space



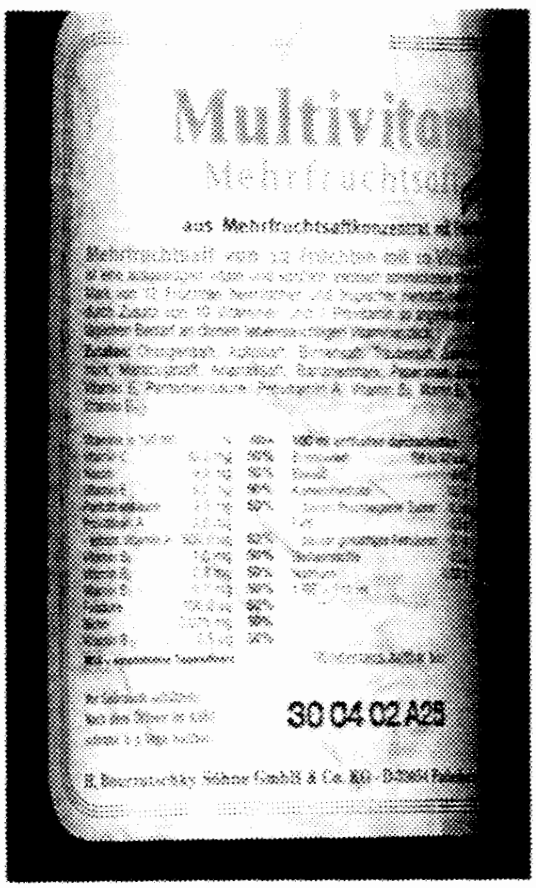
relationships in the German market place and assist in developing concrete feasibility studies and export business plans. Retail chains do not release their actual acquisition contract pricing for public information. These estimates are based on SRD's best secondary information on retail-to-acquisition margins, applied to direct measurements of actual retail sales prices. They should be used only as preliminary indicators, and must be confirmed through actual market tests and direct negotiations with buyers.

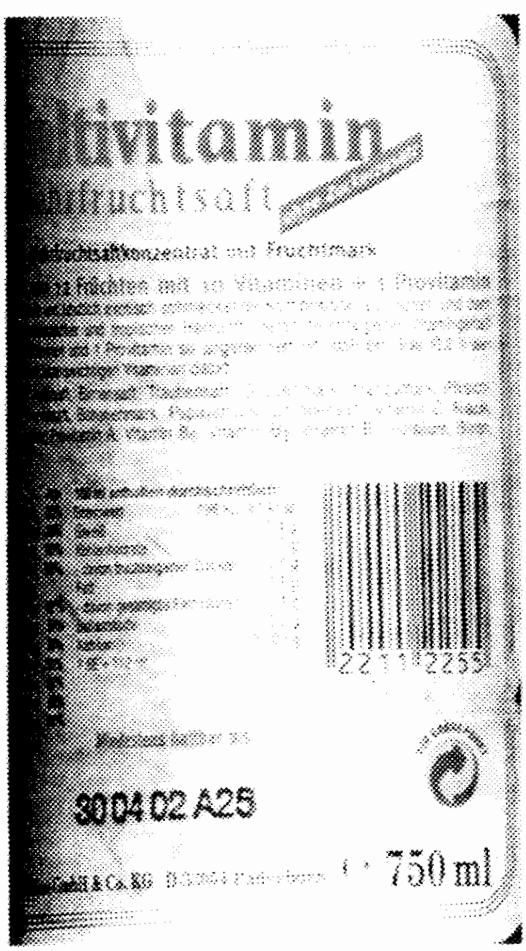
d. Aldi Pricing, Packaging and Product Specifications

The table below provides more precise details on pricing, packaging and product specifications for each product and package type. The images which follow on subsequent pages provide additional detail on product and packaging specifications.

Store Facts and Survey	Aldi			
Product Type	Apricot, Orange, Passion 50% 2 Fruit Multivitamin 100%		12 Fruit Multivitamin 50%	Average
Brand	Ramo	Multivitamin	Sunny	
Net Contents (Liters)	1.00	0.75	1.00	0.92
Package Type	Tetra Foil	Brown Glass	Tetra Foil	
Height cm	16.8	27.8	16.8	20.5
Width cm (or diameter if cylindrical)	9.5	7.0	9.5	8.7
Depth cm (or diameter if cylindrical)	6.0	7.0	6.0	6.3
Shelf Space (Cubic Centimeters)	294,941	65,386	172,368	177,565
Price Local Currency (DM)	1.09	1.09	1.09	1.32
Price in USD Retail per Package	$0.58	$0.64	$0.58	$0.61
USD/Liter of Single Strength Equivalent	$0.58	$0.85	$0.58	$0.69
Estimated 2000 Retailer Acquisition Contract Price				
US$/Package	$0.54	$0.67	$0.53	$0.54
US$/Liter of Single Strength Equivalent	$0.54	$0.75	$0.53	$0.61
Estimated Packaging Specifications (reverse engineered)	Hallbacked Tetra short rectangle format with screw or cradle opening. Dimensions (Bottom, Side, Top, Rim-Diameter, & color CMYK text print on was coat	Brown Glass with screwcap cap. Base Turn diameter. 3.6mm glass thickness. Mouth opening 2.0cm. Two labels w 4 color CMYK was printing on 20 lb. Chromecoat. Back label with three spot color printing on 20 lb. Chromecoat.	Hallbacked Tetra short rectangle format with screw or cradle opening. Dimensions (Bottom, Side, Top, Rim-Diameter, & color CMYK text print on was coat	
Product Specifications	50% three fruit nectar mix reconstituted from juice concentrates and purees. Product content in order of proportions: water, apricot puree, orange and passionfruit juice concentrates, sugar, glucose syrup.	100% fruit juice reconstituted from concentrates and pulps. Product content in order of proportions: orange, apple, pear and grape juice concentrates, guava, mango, and plum purees, passion fruit, and pineapple juice concentrates, banana and papaya purees, lemon juice concentrate with 11 vitamin additives.	50% 12 fruit nectar, mixed from juice reconstituted from purees and concentrates. Product content in order of proportions: water, orange juice concentrate, banana and plum purees, water, pineapple, pear, grape, passion fruit and lemon juice concentrates, mango, guava and papaya purees, concentrates, sugar and mineral vitamins	
Bev	12.3	12.5	9.5	10.3
SRD A Panel Taste Preference (1-10 scale all fruit bev	5.0	6	4	5.0
Shelf Life in Months from FOP	11.0	23.0	11.0	15.0

Mehrfruchtsaft
1.39 DM
aus Orange, Apfel, Birne, Traube,
Guave, Mango, Pfirsich, Maracuja,
Ananas, Banane, Papaya, Zitrone


30 04 02 A25


30 04 02 A25
750 ml

LIGHT
MULTIVITAMIN
12-FRUCHTNEKTAR

süssli

LIGHT
MULTIVITAMIN
12-FRUCHTNEKTAR

aus Mehrfruchtsaftkonzentrat · mit Fruchtmark
kalorienvermindert · mit Süßungsmitteln

Fruchtgehalt: mindestens 50%

aus Orange, Banane, Pfirsich, Apfel, Ananas, Birne, Trauben, Maracuja, Zitrone, Mango, Guava, Papaya.
Ausgewählte Früchte + lebenswichtige Vitamine.
Mindestens haltbar bis: siehe Kopfseite

e1LITER

süssli

Zur besonderen Ernährung
bei Diabetes mellitus im Rahmen
eines Diätplanes geeignet.

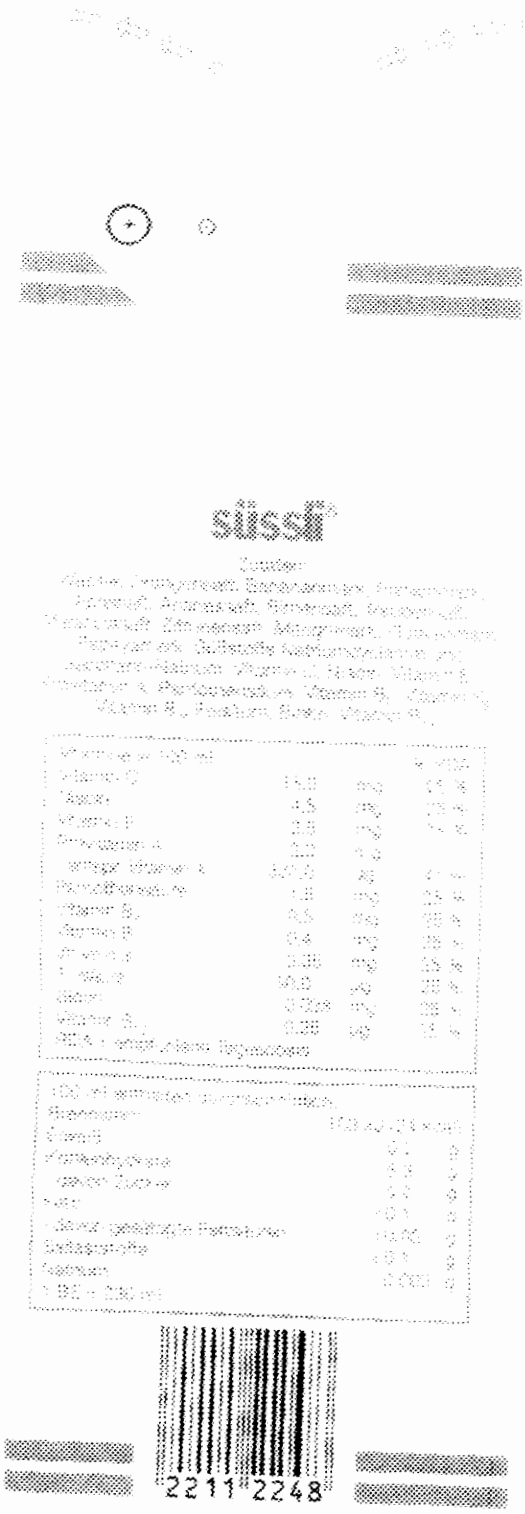
Kohlenhydratvermindert, da an Stelle von Zucker mit Süßstoffen gesüßt (5,6 g Zucker sind durch 0,026 g Süßstoffe pro 100 ml ersetzt).
Enthält 50% weniger Kalorien als ein mit Zucker gesüßter Fruchtnektar und ist eine ausgewogen vitale und köstlich exotisch schmeckende Komposition aus Säften und dem Mark von 12 Früchten heimischer und tropischer Herkunft, deren fruchteigener Vitamingehalt durch Zusatz von 10 Vitaminen und 1 Provitamin so angereichert ist, daß 400 ml den täglichen Bedarf an diesen lebenswichtigen Vitaminen decken.

e1LITER

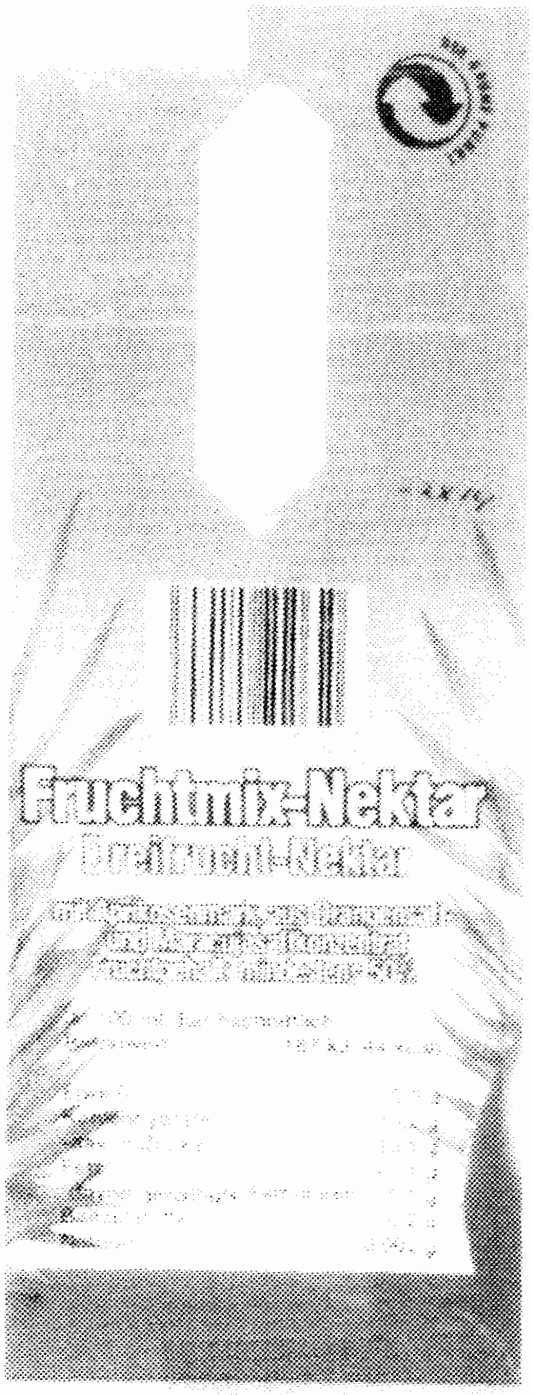
Vor Gebrauch schütteln –
nach dem Öffnen im Kühlschrank
2 – 3 Tage haltbar.

Wesergarten Getränke GmbH
31735 Rinteln

Tetra Brik®
Aseptic
Tetra Pak®


süssli
2211 2248
AN 3820
5

Fruchtmix-Nektar
Dreifrucht-Nektar
RANJO
Fruchtmix-Nektar
Dreifrucht-Nektar
mit Aprikosenmark, aus Orangensaft
und Maracujasaftkonzentrat
Fruchtgehalt mindestens 50%
e 1 Liter



W. Kirberg GmbH & Co. KG
D-33064 Paderborn

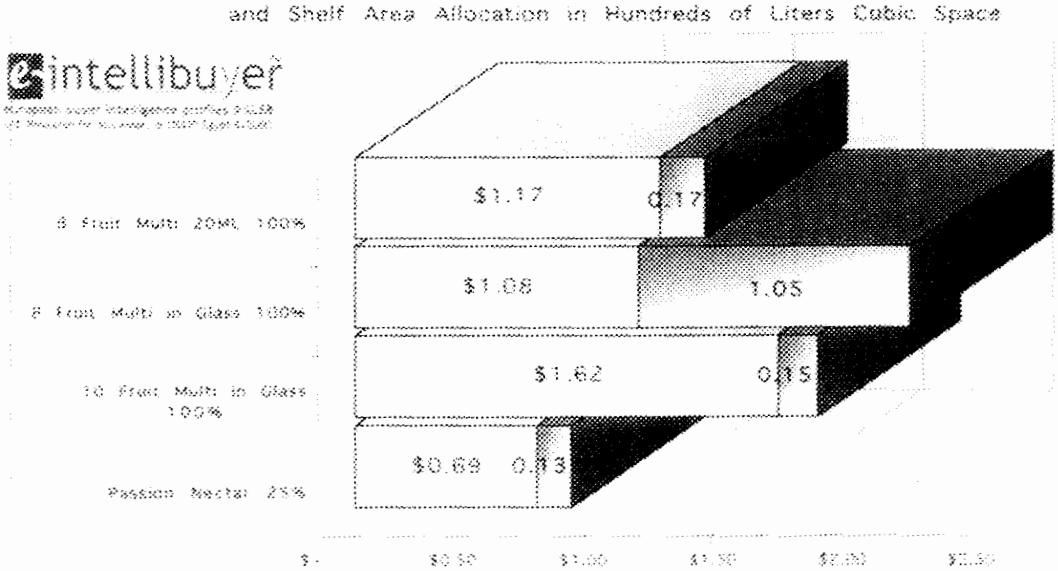
7. Kupsch Traditional Store Buyer Briefs

a. Kupsch Estimated Buyer Acquisition Contract Prices and Shelf Space Allocation

The graph opposite presents the SRD/*e-intellimarc* estimates of the acquisition contract price paid and shelf space allocated on average by the traditional store Kupsch, for each major exotic tropical juice product type and package size. The acquisition price estimates do not measure a specific transaction. They are intended only as general guidelines based on estimated margins and import product costs.

In aller Frische. kupsch

Kupsch Traditional Stores: Exotic Tropical Fruit Juices and Mixtures in the German Market: Estimated Acquisition Contract Prices in US$/Liter and Shelf Area Allocation in Hundreds of Liters Cubic Space



The acquisition price estimates by package size and type can give potential exporters a more refined idea of the quality and price relationships in the German market place and assist in developing concrete feasibility studies and export business plans.

Retail chains do not release their actual acquisition contract pricing for public information. These estimates are based on SRD's best secondary information on retail-to-acquisition margins, applied to direct measurements of actual retail sales prices. They should be used only as preliminary indicators, and must be confirmed through actual market tests and direct negotiations with buyers.

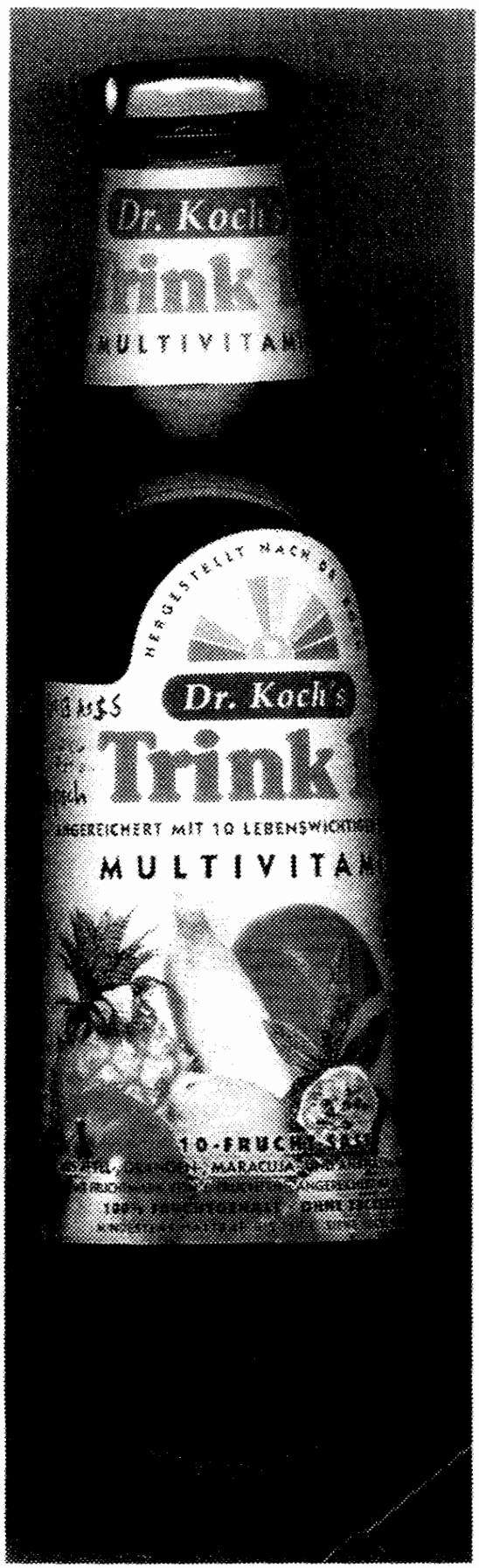
b Kupsch Pricing, Packaging and Product Specifications

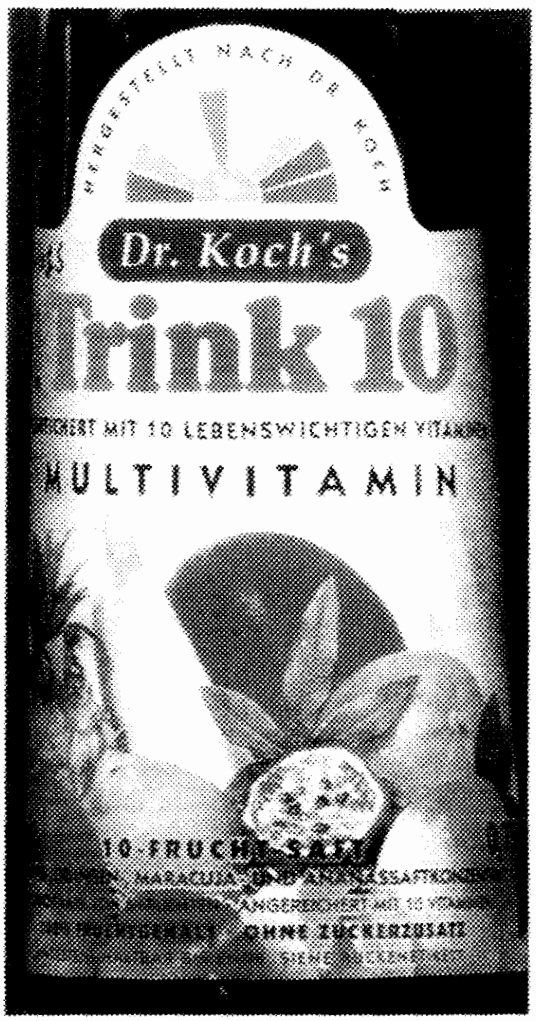
The table below provides more precise details on pricing, packaging and product specifications for each product and package type. The images which follow on subsequent pages provide additional detail on product and packaging specifications.

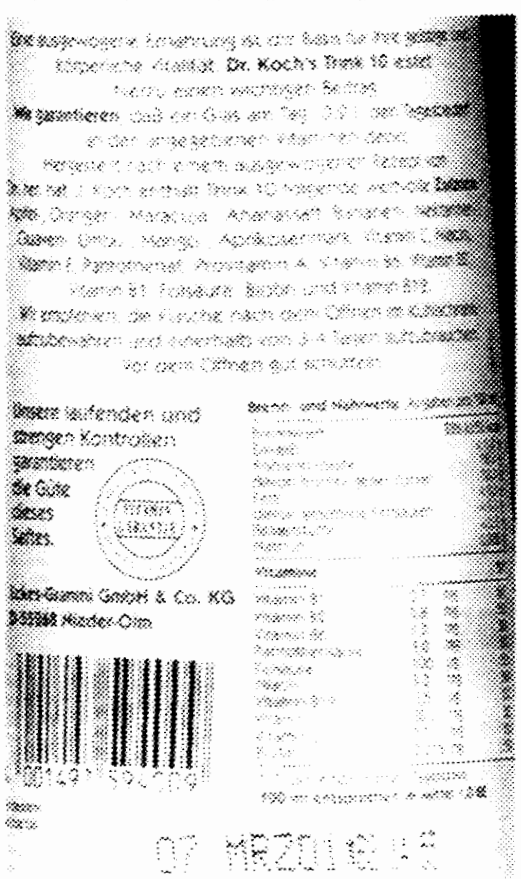
Traditional Stories

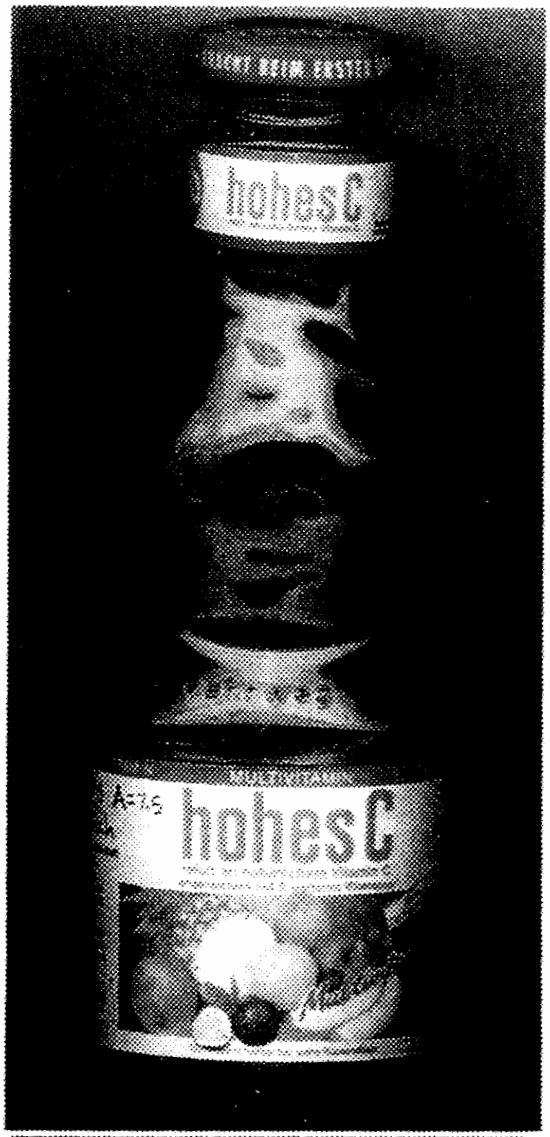
Kupsch

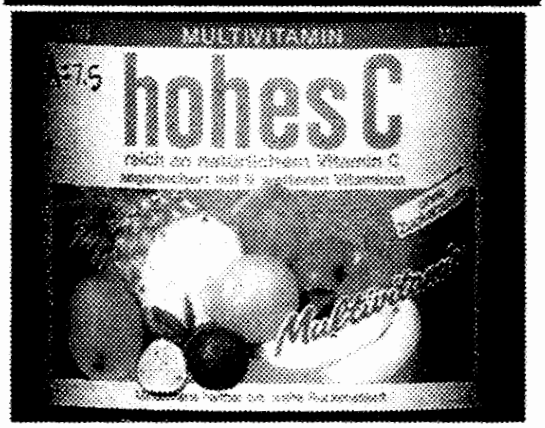
Store Price (all taxes)	Passion nectar 25%	10 Fruit Multivitamin 100%	8 Fruit Multivitamin 100%	8 Fruit Multivitamin 100%	Average
Product Type	nectar/fruit	Dr. Kuschs	fruitiest C	fruitiest C	
Brand	1.0ltr	0.75	0.75	0.20	0.66
Net Contents (Liter)	Tetra Pak	Brown Glass	Glass	Tetra Pak	
Package Type	15.6	26.0	23.0	8.2	18.3
Height cm	9.8	7.0	7.8	6.0	7.4
Width cm (or diameter if cylindrical)	6.0	7.0	7.8	3.6	6.1
Depth cm (or diameter if cylindrical)	13,408	15,288	104,949	17,004	37,450
Shelf Space (Cubic Centimeters)	1.49	2.99	1.99	0.57	1.81
Price Local Currency (LC)	$0.78	$1.37	$0.91	$0.26	$0.83
Price in US$ Retail per Package	$0.78	$1.83	$1.22	$1.31	$1.28
US$/Liter of Single Strength Equivalent					
Estimated 2000 Retailer Acquisition Discount Price US$/Package	$0.63	$1.22	$0.81	$0.23	$0.74
US$/Liter of Single Strength Equivalent	$0.66	$1.62	$1.08	$1.17	$1.14
Contracted Packaging Specifications (special engineered)	Traditional Tetra short rectangle format w/ screw or press opening. Cartons: Sheet, non-Tetra, Non-Gloss, 4 color CMYK logo print w/ aqueous coat	Brown Glass with screw cap. Base Foil diameter. 1 color glass contained. Round drawing 2.8cm, circular taper shape from a curve diameter of 7cm to 5cm at 18cm height. A 6cm neck follows with a taper from a 5cm diameter to 3 5cm. Two labels in 4 color CMYK logo printing on 20 lb. Chromolux. Neck label black only on 20 lb. Chromolux	Glass with screw cap. Unique three taper format. Front and back labels in 4 color CMYK logo printing on 20 lb. chromolux. Neck label with two spot color printing on 20 lb. Chromolux	Traditional Tetra single serving 20 sheet rectangle format w/ attached plastic straw and for opened consumption. Cartons: Sheet, Non-Tetra, Non-Gloss, 4 color CMYK logo print w/ aqueous coat
Product Specifications	100% pressed fruit juice reconstituted from concentrate. Product contains a range of concentrates apple, orange, pineapple, black currant, grape, blueberry, citrus, sugar	100% fruit juice reconstituted from concentrates and water. Product contains a range of concentrates apple, orange, pineapple, black currant, mandarin, grape, cranberry, orange and apricot puree, with 10 vitamins/minerals	100% 8 fruit concentrate multivitamin juice reconstituted from purees and concentrates. Product contains a range of concentrates apple, orange and pineapple juice concentrates, apricot and banana purees, passion fruit juice concentrates, orange and mandarine purees with 10 vitamins	100% 8 fruit concentrate multivitamin juice reconstituted from purees and concentrates. Product contains a range of concentrates apple, orange and pineapple juice concentrates, apricot and banana purees, passion fruit juice concentrates, orange and mandarine purees with 10 vitamins	
Size	13.5	13.0	10.0	18.5	13.4
SKU # (Base Case) Pressure (1-10 range of high or low)	3	2.5	2.5	3.4	2.9
Shelf Life in weeks from P.P.	8.0	10.0	10.0	17.0	11.3

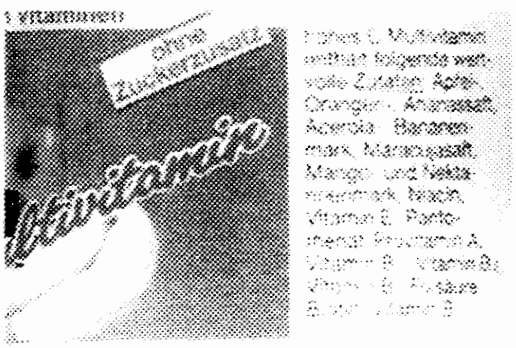

Dr. Koch's
Trink
MULTIVITAM
HERGESTELLT NACH DR. KOCH
Dr. Koch's
Trink
MULTIVITAM
10-FRUCHT-SAFT


HERGESTELLT NACH DR. KOCH
Dr. Koch's
Trink 10
MULTIVITAMIN
10-FRUCHT-SAFT
OHNE ZUCKERZUSATZ

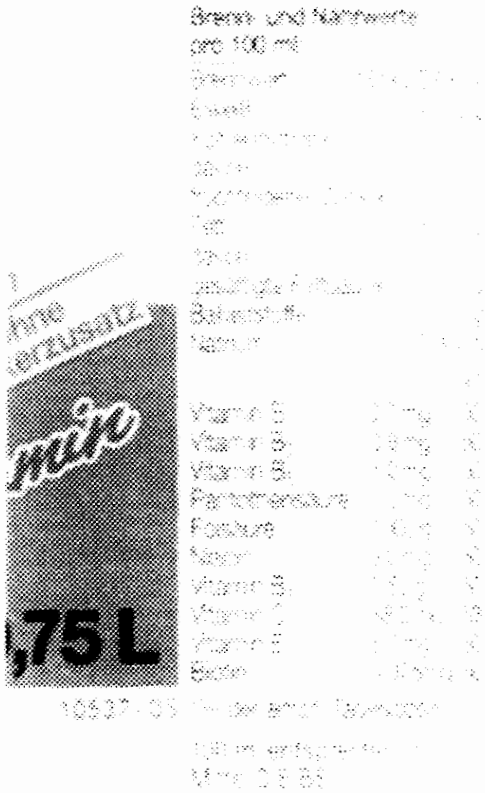

Dr. Koch's Trink 10
Unsere laufenden und strengen Kontrollen garantieren die Güte dieses Saftes.
Ickes-Gummi GmbH & Co. KG
Hinzler-Olm







MULTIVITAMIN



MULTIVITAMIN

B=10.5 A=7.5

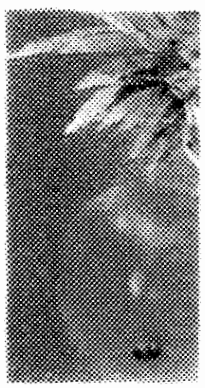
Kupsch

Mehrfrucht-Saft
aus Apfel-, Orangen-, Ananas- und Maracujasaft-konzentrat.

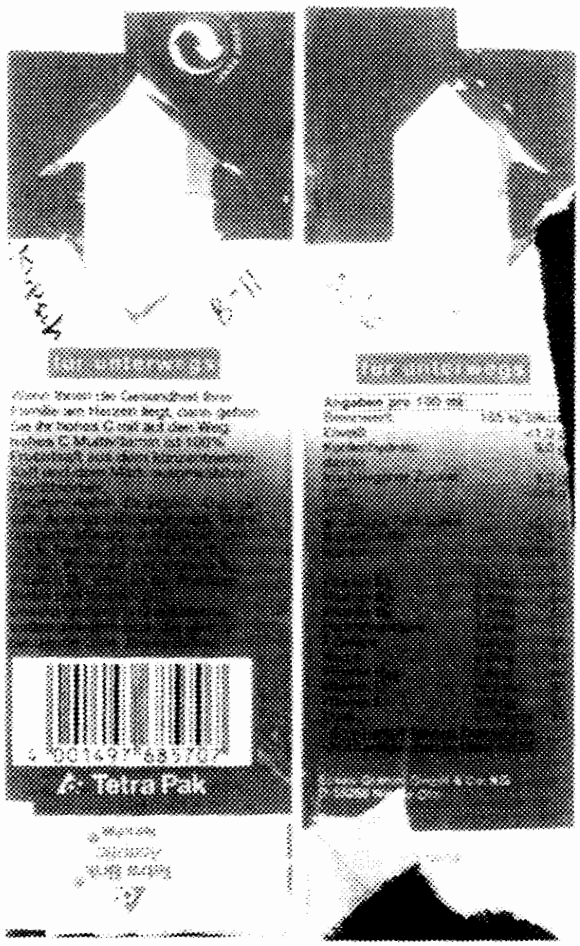
Mit Fruchtmark von 4 Früchten, angereichert mit 9 Vitaminen.

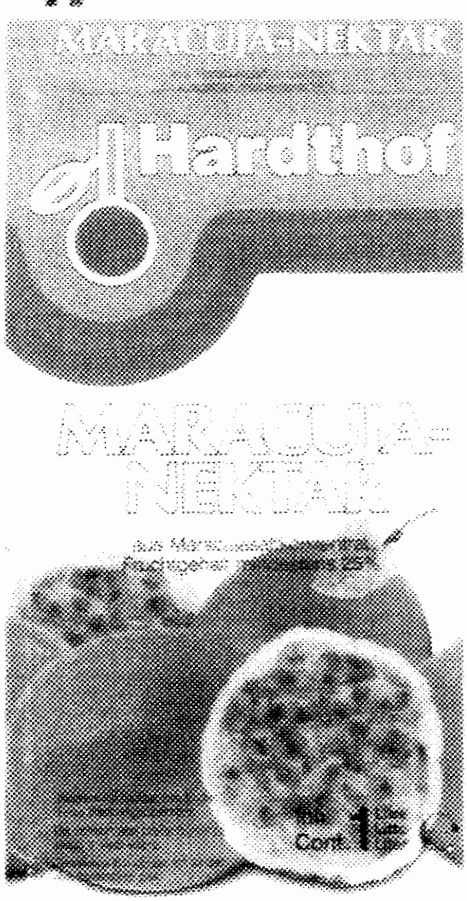
Fruchtgehalt 100 %

0,75 L



MULTIVITAMIN
hohes C
Mehrfruchtsaft
Fruchtgehalt: 100 %


Tetra Pak


MARACUJA-NEKTAR
Hardthof
MARACUJA-NEKTAR

CA
Maracuja-Nektar
Passionfruit-Nectar
Nectar de Fruit de la Passion
Passievruchten Nectar
Nettare di Passiflora
Nectar de maracuja

e-intellimarc

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for export opportunity identification