

- PN-ADC-540 -

Egyptian GRAPE JUICE

e-intellimarc
EXPORT OPPORTUNITY IDENTIFICATION FOR EXPORT BUSINESSES

in the German Market

**Supporting Egypt's
Processed Foods**

Export Industry

**Prepared By
Agriculture-Led
Export Businesses**

(ALEB)

July 2000

Funded by
U.S. Agency for
International

Development

USAID/Egypt

RP 0264

Under Contract No.
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USAID Cognizant

Technical Office: USAID/
Egypt/EG/ED

CTO: Mr. Tarek Shata

ALEB Egypt Agriculture Led
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*supporting Egypt's processed
foods export industry*

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Funded by USAID Contract No. 263-C-00-99-00011-00*

an ALEB/SRD *expo marc profile*
for export opportunity identification

1 Liter



Egyptian

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GRAPE JUICE



in the German Market

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supporting Egypt's processed
foods export industry**



SRD RESEARCH GROUP INC.
Food and business 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

**an ALEB/SRD expomarc profile
for export opportunity identification**

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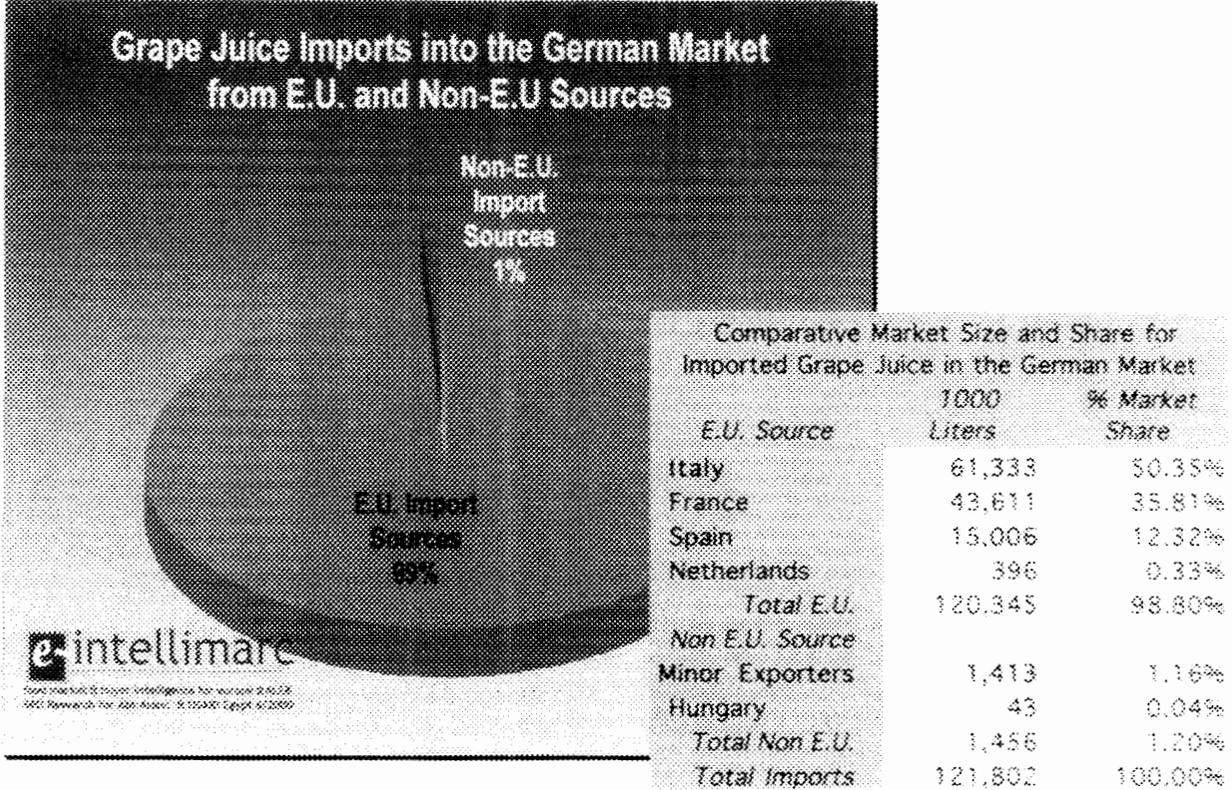
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Imported Grape Juice in the German Market

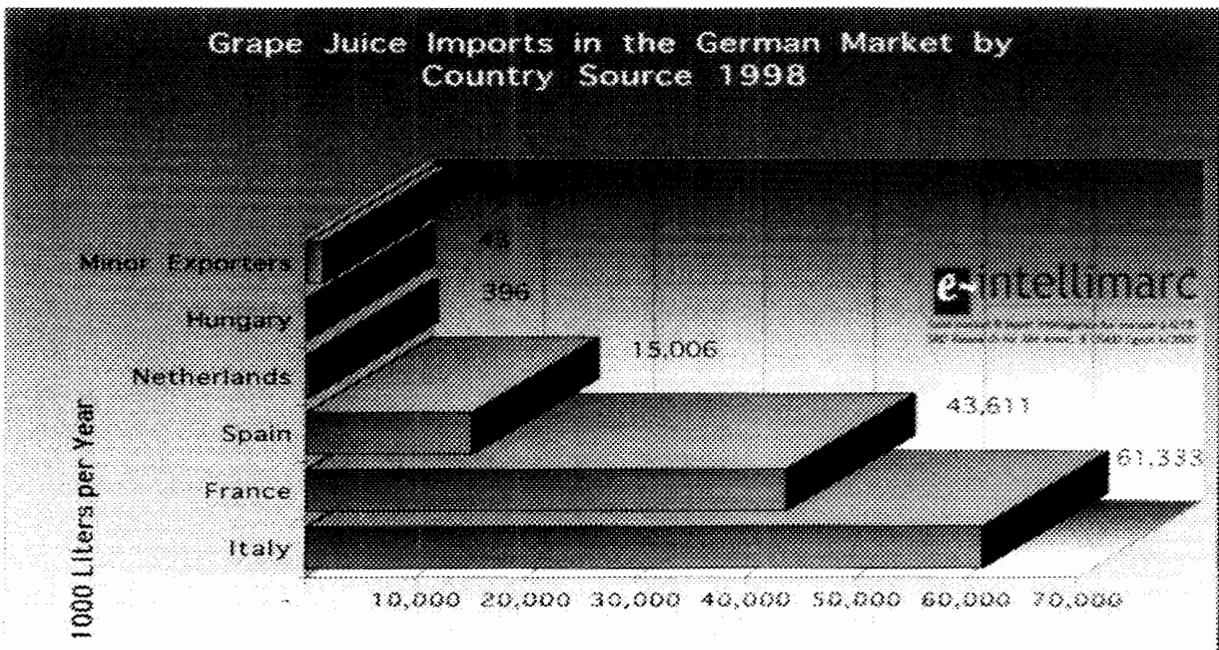
1. Export Opportunity Identification

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

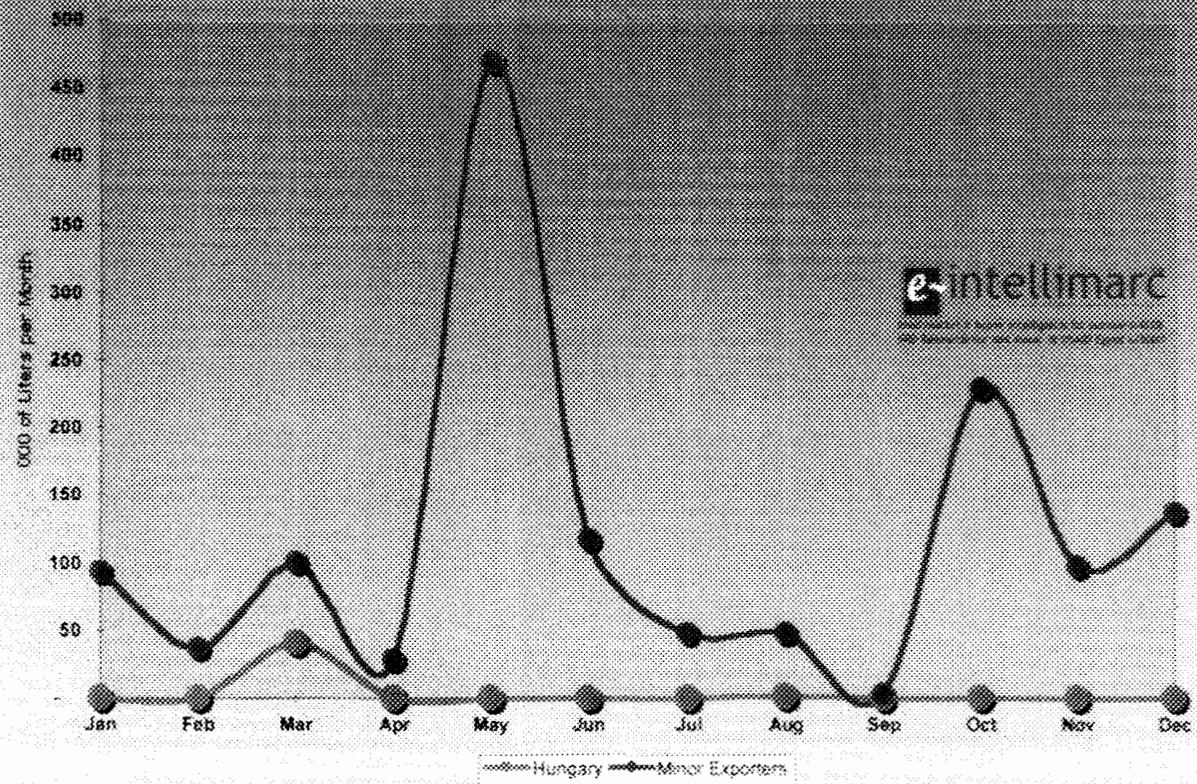
The tables and charts on this page measure the metric tons of imported product received from each supplying country during 1998 and the percentage share each has in the German import market. These tables and charts assist in identifying the size and competitive structure of the German grape juice export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



b. Import Market Share by Competitive Supplier Country

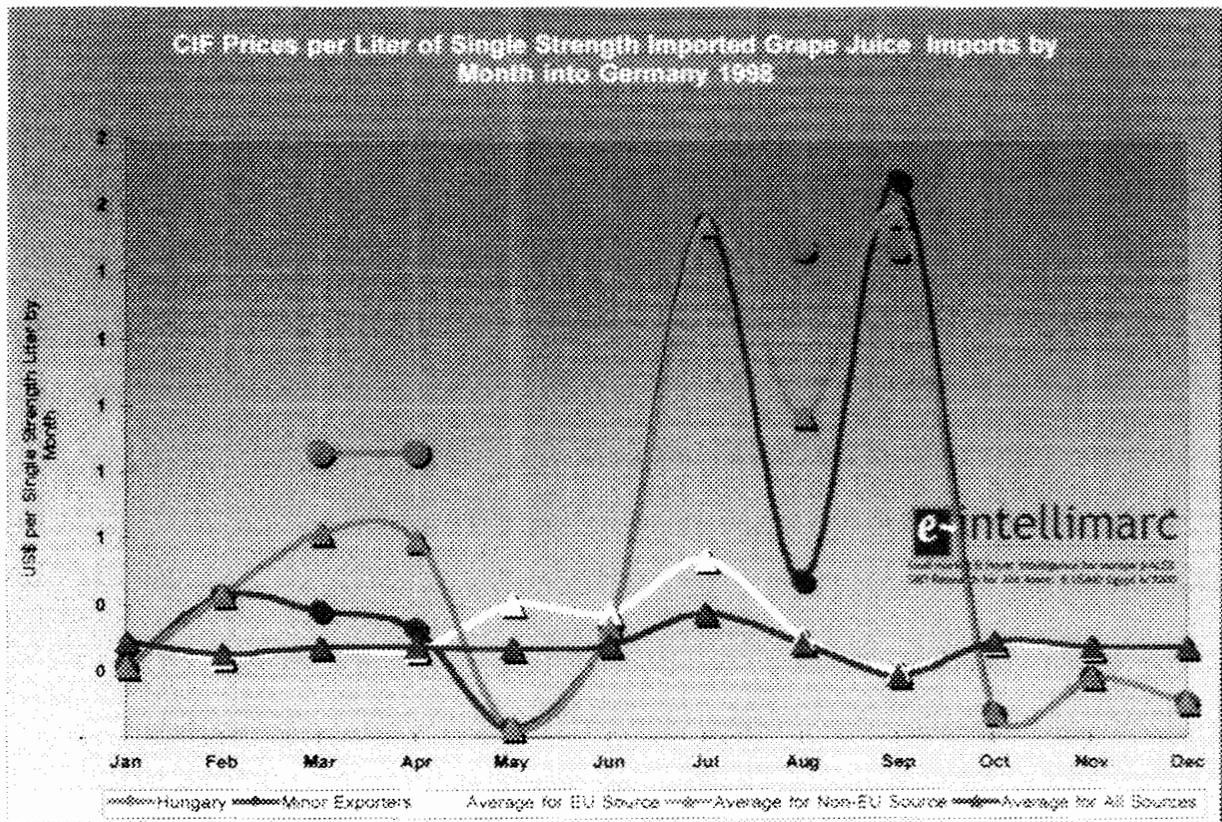


Non EU Source Grape Imports by Month into Germany 1998



Non-EU Source Monthly Grape Juice Imports into Germany 1998
(000 of Single Strength Equivalent Liters per Month)

	Hungary	Minor Exporters	Total Non-EU Imports	Total EU Source Imports	Total All Source Imports
Jan	-	94	94	5,459	5,553
Feb	-	37	37	12,612	12,649
Mar	41	101	142	10,402	10,544
Apr	-	28	28	10,591	10,619
May	-	470	470	8,800	9,270
Jun	-	118	118	8,771	8,889
Jul	-	48	48	9,909	9,957
Aug	2	49	51	10,499	10,550
Sep	-	2	2	8,112	8,114
Oct	-	230	230	11,986	12,215
Nov	-	98	98	9,434	9,533
Dec	-	138	138	13,772	13,909
Total	43	1,413	1,456	120,345	121,802



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.

CIF Price Per Liter by Month for Non-EU Source Imported Grape Juice into Germany 1998 (Single Strength Juice Equivalent)

	Average for		Average for		Average for	
	Hungary	Minor Exporters	EU Source	Non-EU Source	All Sources	
Jan		\$ 0.22	\$ 0.29	\$ 0.22	\$ 0.29	
Feb		\$ 0.43	\$ 0.24	\$ 0.43	\$ 0.25	
Mar	\$ 0.86	\$ 0.38	\$ 0.28	\$ 0.62	\$ 0.28	
Apr		\$ 0.33	\$ 0.27	\$ 0.33	\$ 0.28	
May		\$ 0.03	\$ 0.40	\$ 0.03	\$ 0.27	
Jun		\$ 0.33	\$ 0.28	\$ 0.33	\$ 0.28	
Jul		\$ 1.55	\$ 0.54	\$ 1.55	\$ 0.38	
Aug	\$ 1.47	\$ 0.47	\$ 0.30	\$ 0.97	\$ 0.28	
Sep		\$ 1.68	\$ 0.20	\$ 1.68	\$ 0.19	
Oct		\$ 0.08	\$ 0.28	\$ 0.08	\$ 0.29	
Nov		\$ 0.18	\$ 0.27	\$ 0.18	\$ 0.27	
Dec		\$ 0.11	\$ 0.27	\$ 0.11	\$ 0.27	
Average	\$ 1.16	\$ 0.48	\$ 0.32	\$ 0.82	\$ 0.28	

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.

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 ² 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	
10 Aidi	Aidi	

Supermarkets

Owner Group	Facias	
SHV Makro	Otto Reichert	
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	Neukauf	

Specialists

Rodeturm Apotheke		
Tengelmann	Fachmarkte	

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 grape juice.

This represents an average of all stores in the category, including all different product types

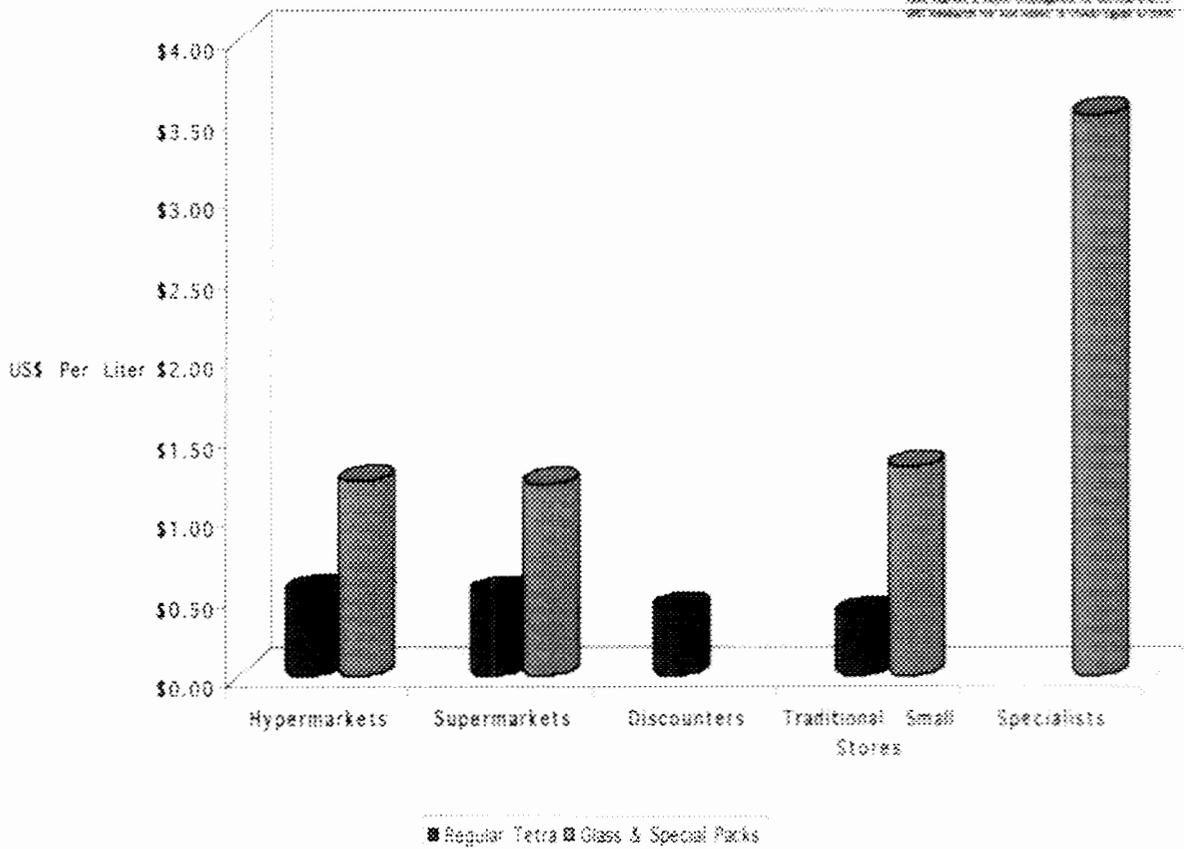
(white, red and dietetic juice), and all package sizes and types (tetra and glass).

The chart below averages SRD/e-intellimarç estimates of all store types, all products and all packages to illustrate acquisition prices



Estimated Retail Acquisition Contract Prices for Grape Juice in Germany by Type of Outlet and General Package Type, May 2000

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PART TWO: BUYER INTELLIGENCE FOCUS PROFILE: THE TENGELMANN GROUP



5. The Tengelmann Group: Buyer Focus Profile

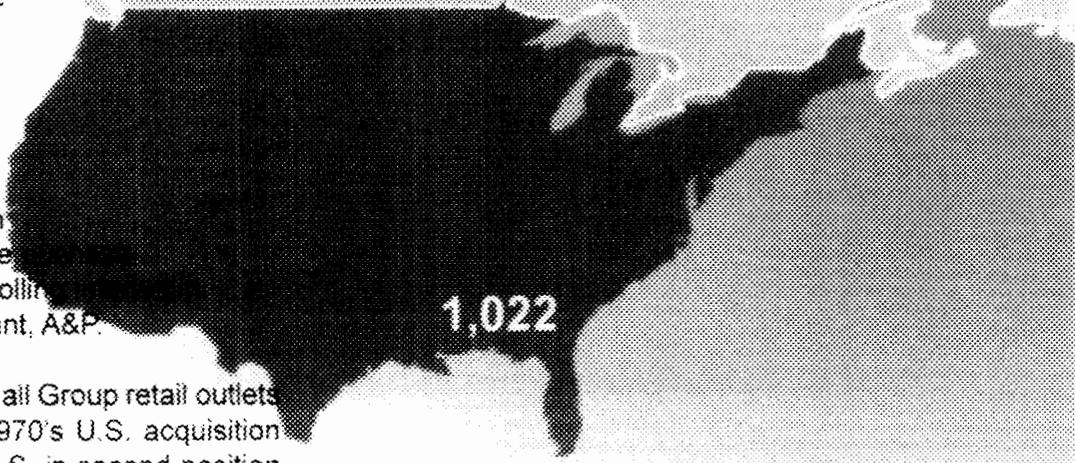
a. The Tengelmann Group: Worldwide Corporate Overview

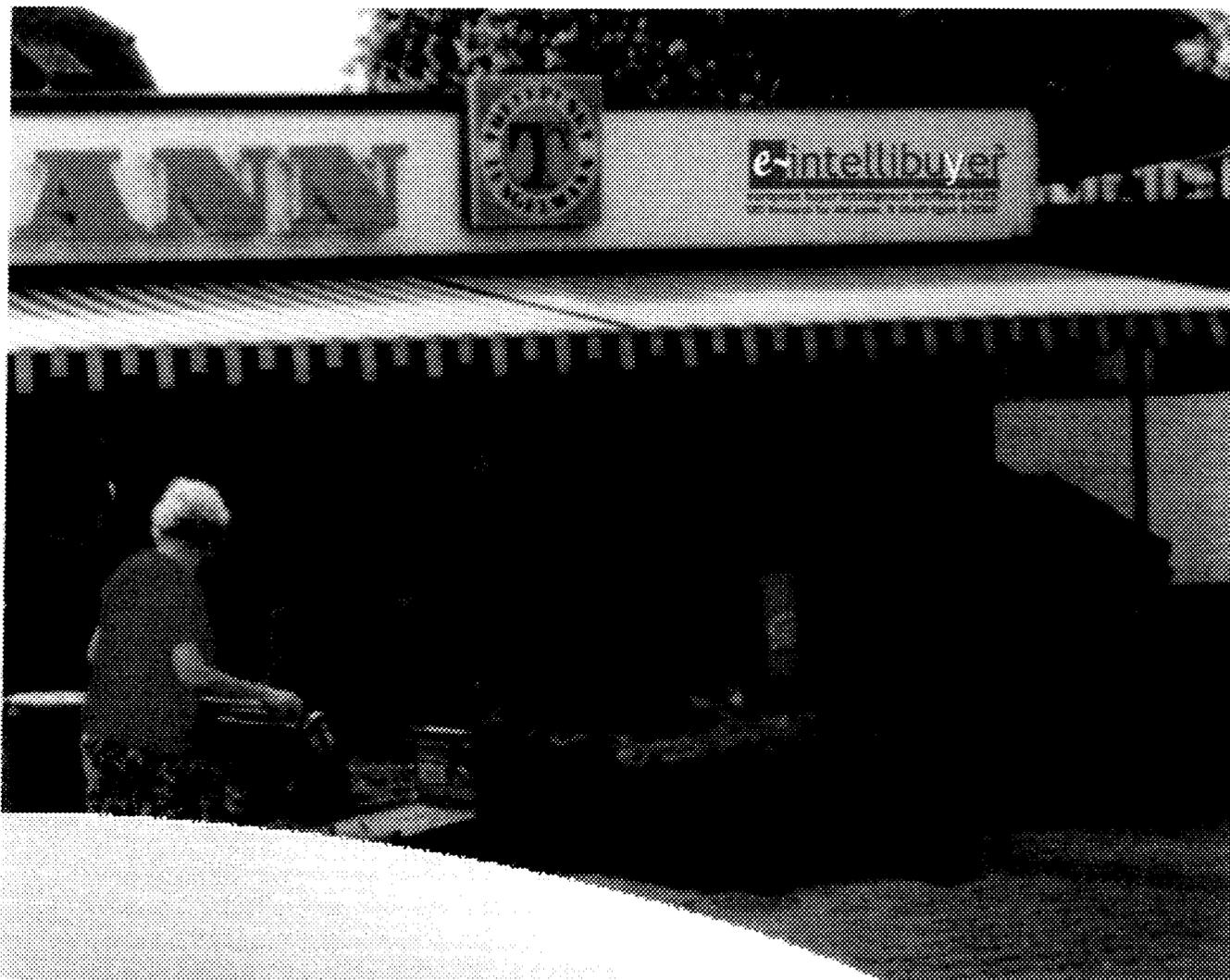
Karl Erivan and Christian Haub are the heirs apparent to the Tengelmann Group family fortune which employs over 200,000 and sells over \$20B in food and household goods. The Haub fortune was established over 100 years ago in Germany and now owns a varied set of over seven thousand retail outlets in nine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

During the last few decades the empire has grown principally through acquisitions, including the purchase 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 growth areas, and Tengelmann is no exception.



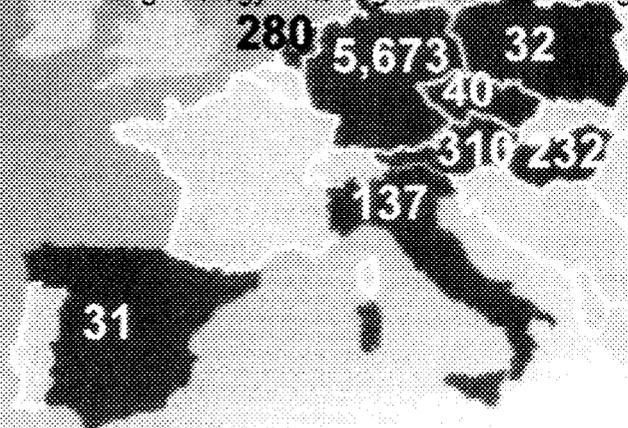


THE WORLD OF TENGELMANN

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.

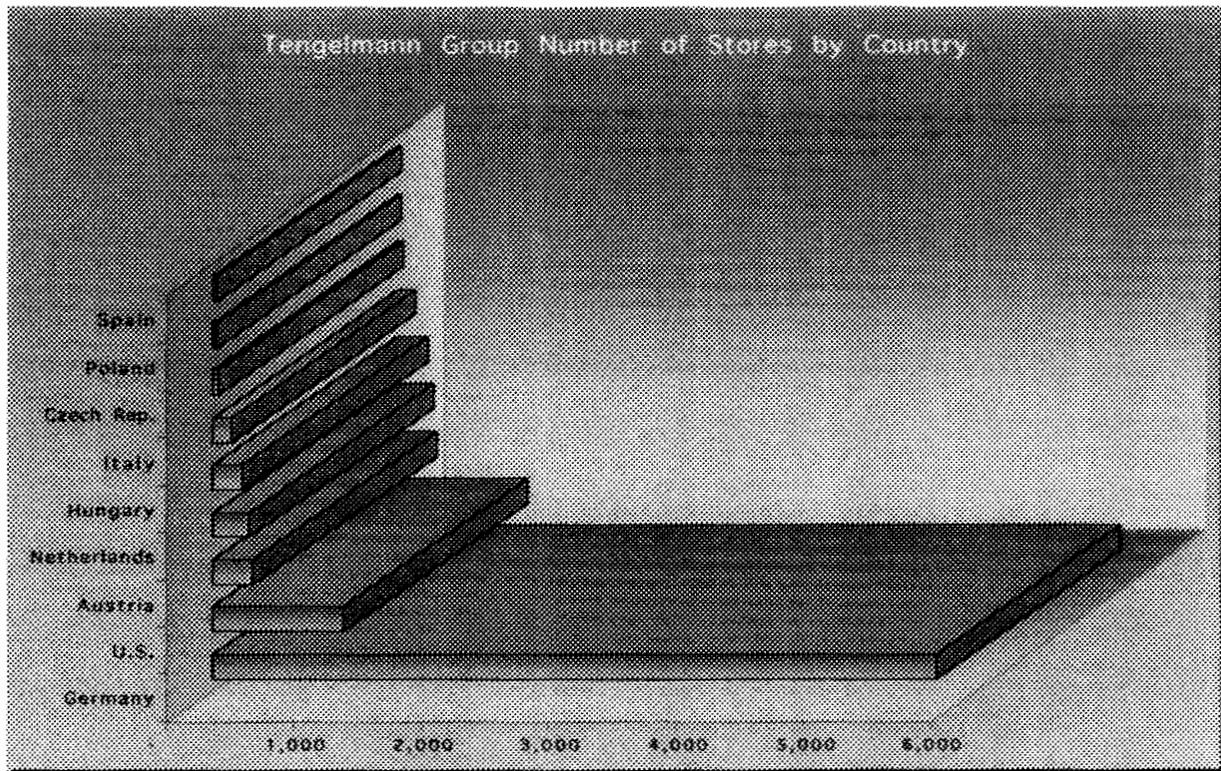
b. Tengelmann Group Marketing Strategy

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 facias. 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 strengthen 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.

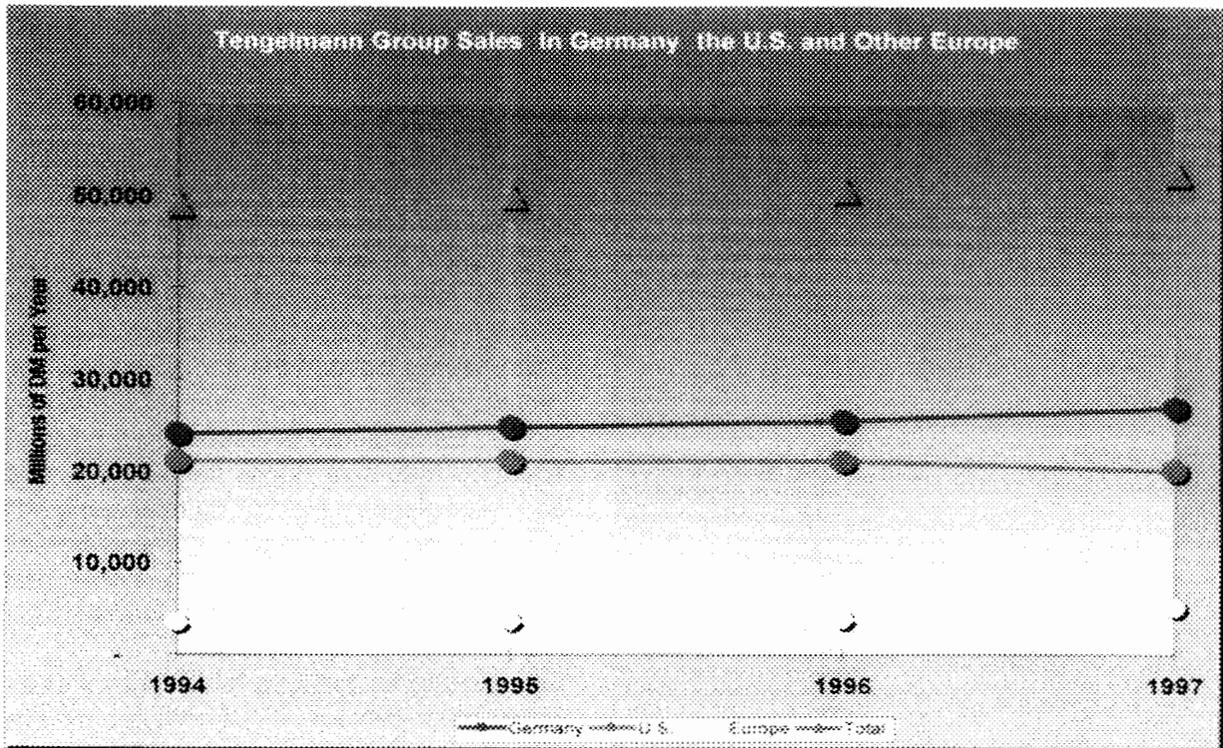
c. Tengelmann Group Strengths, Weaknesses and Strategic Opportunities

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 believe 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.

it is useful to sketch the growth future of the product sector which SRD characterizes 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 stores, 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 believe 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 Tengelmänn along both the scale and product dimensions of these bi-polar competition axes.

The second major Tengelmänn 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.

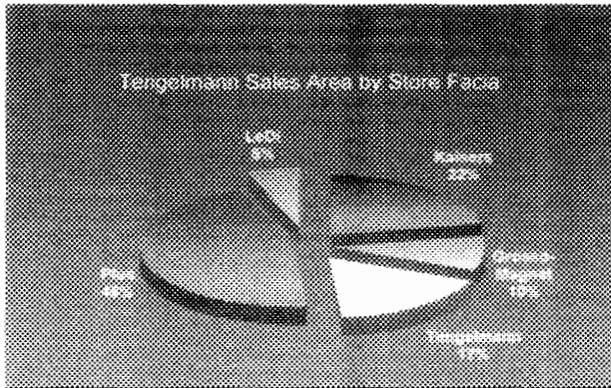
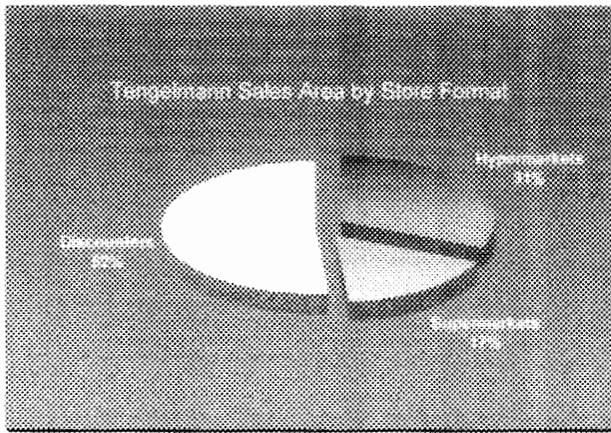
Tengelmänn's principal weaknesses appear to be (1) stagnating profits in whole major

facias 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 Tengelmänn correspond to their identified strengths 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. Tengelmänn'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	25,546	21,242	3,883	50,671
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

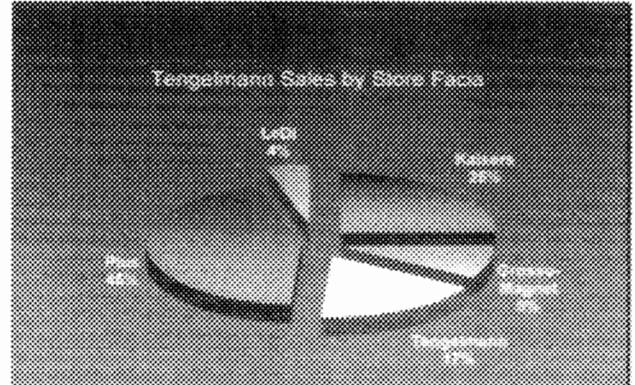
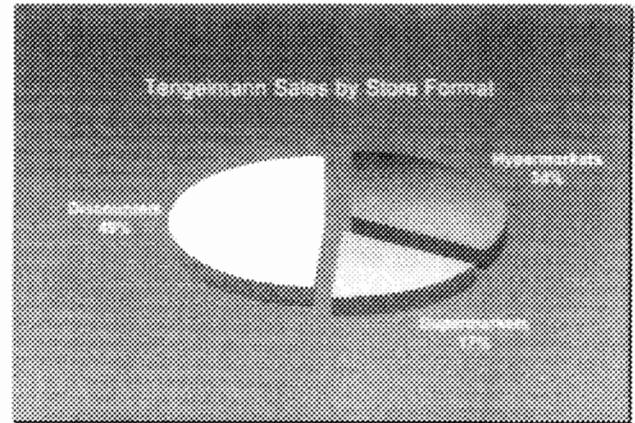
Outlet Type	Sales (Million DM)	Sales Area (Sq. Meters)	% Sales (%)	% Sales Area (%)	Sales/Sq.M. (DM/Sq.M.)
All Stores	19,744 DM	2,643,610	100.0%	100.0%	7,469 DM
Hypermarkets	6,630 DM	832,486	33.6%	31.5%	7,964 DM
Supermarkets	3,450 DM	452,706	17.5%	17.1%	7,621 DM
Discounters	9,664 DM	1,358,418	48.9%	51.4%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

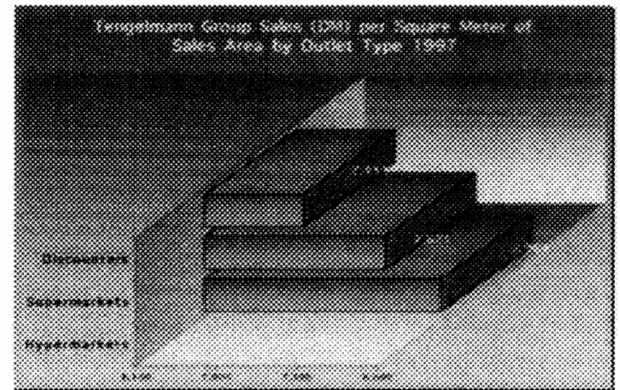
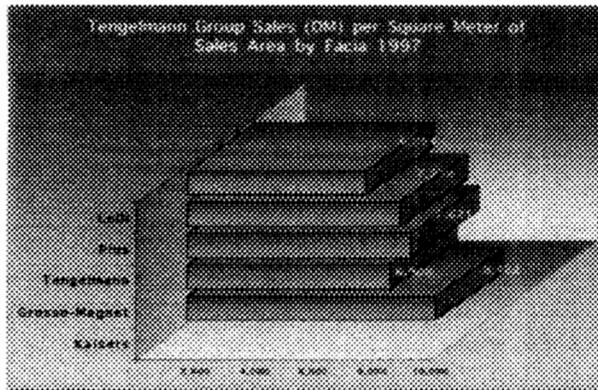
The traditional supermarket format, represented by the Tengelmann facia, lies in the middle of the discounter and hypermarket poles with sales per square meter at 7,621DM. This gives the supermarket format the same, albeit low, percentage (17%) in both sales area and sales

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

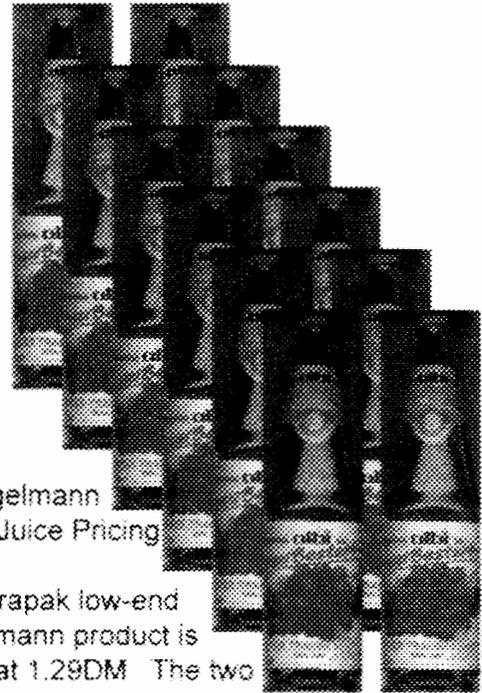


supply chain across facias. What is left is a complex and somewhat inconsistent system of partially integrated and partially independent supply chains for each facia. Thus strategic supply alliances must be approached facia by facia and not for the group as a whole.



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
LeDi	Discounter	884 DM	145,292	4.5%	5.5%	6,084 DM
	All Stores	19,744 DM	2,649,610	100%	100%	7,469 DM

Tengelmann Supermarket Typical Grape Juice Shelf Display



f. Tengelmänn Supermarket Grape Juice Product Line, Brand and Pricing Strategy

i. Tengelmänn Grape Juice Product Line

The images above illustrate a typical Tengelmänn supermarket grape juice shelf display. The Tengelmänn grape juice product line is comprised of only red grape juice offered in a no-frills and low priced tetra one liter package, and an up-market good quality and high priced glass pack. Two products is a typical supermarket format line, discounters normally display one product and hypermarkets usually display three.

The Tengelmänn Krings low-end tetrapak product had the lowest taste preference rating (2.75 out of a possible 10) of all of the 12 grape juices panelled for the seven sampled German stores. In contrast, the glass pack up-market Albi product received a good 7.25 taste test rating in the 4 panel SRD review. Both of the Tengelmänn products had the lowest Brix levels, 15.0, of any of the twelve sampled German grape juices. It is of interest to note that in general, the highest priced and highest taste rated grape juices also had the highest Brix levels, ranging up to 17.5.

ii. Tengelmänn Grape Juice Brand Strategy

Reflecting the earlier mentioned lack of vertical integration and lack of Tengelmänn private labels, both of the grape juice products are produced by independent suppliers and neither is a Tengelmänn label. The low-end tetrapak product is processed by Krings Herrath Fruit-Drinks of Monchengladbach, and the glass pack by Albi GmbH & Co. with plants in Ulm, Dusseldorf and Maadebura.

iii. Tengelmänn Grape Juice Pricing

The tetrapak low-end Tengelmänn product is priced at 1.29DM. The two discounters sampled, Lidl and Aldi, priced somewhat higher quality juices (rated 3.0 and 5.0) at .99DM. The low-end regular tetrapak grape juice at the sampled hypermarket (Kaufland) is similarly priced at 1.29DM, while the traditional Norma stores priced their tetra pack consistent with the discounters at .99DM. The somewhat up-scale traditional, Kupsch, did not even offer a low-end tetra pack, their offerings were in glass at 2.99DM, and the very upscale specialist health Apotheke, Rodertum offered only very high quality 7-8 rated sugar-free product in one liter glass at 5.95DM.

g. Tengelmänn Grape Juice Shelf Space Allocation and Product Movement Analysis

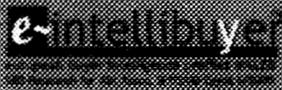
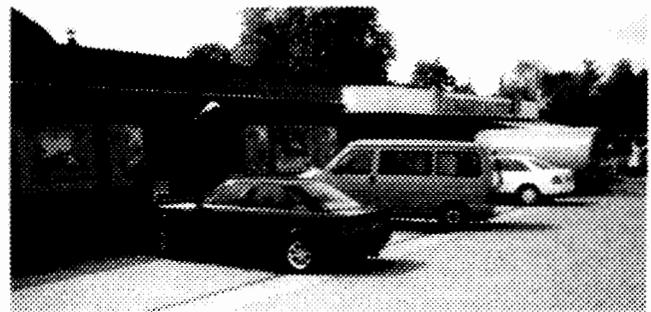
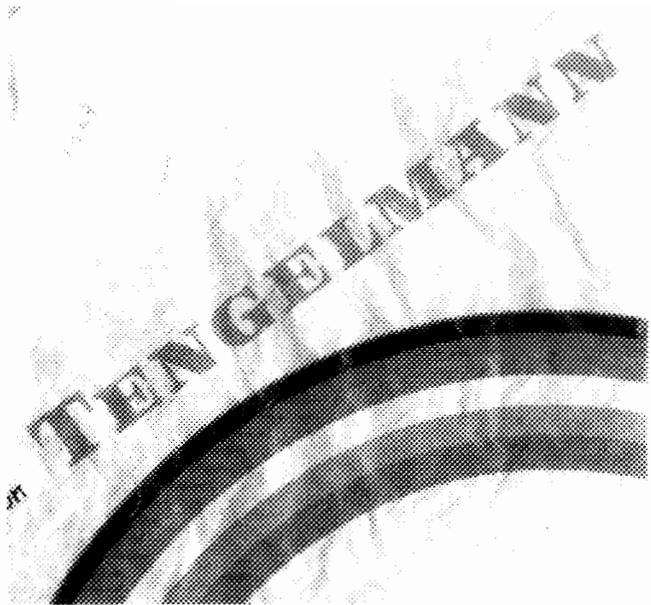
The typical Tengelmänn supermarket shelf space allocation for grape juice covers a total of 51,000 cubic centimeters with a floor space area, including an allocation for non-display, of .34m² for the Krings tetrapak and .24m² for the Albi glass pack. Using the SRD estimate of product movement observed in the sample store, an average Tengelmänn supermarket will move 2,020 of the Krings packages and only 387 of the Albi packages per year. This implies a sales value of 3,763DM per store, and a total sales for all 695 Tengelmänn stores of US\$ 647,103 in the Krings tetrapak and US\$123,980 in the Albi glass pack. This implies that Tengelmänn negotiates an acquisition contract of approximately \$1m for tetra and \$.5m for glass pack red grape juice

h. Tengelmann Grape Juice Packaging

The Tengelmann low-end tetra package is a standard .1mm foilback and .02mm film composition on a .34mm carton stock. It is the simplest of rectangular designs and without any of the possible combi flip-top or screw openings which increase the consumer interest and price of the package. Likewise the label printing is of the cheaper spot color type without necessity for color separations or close registration printing.

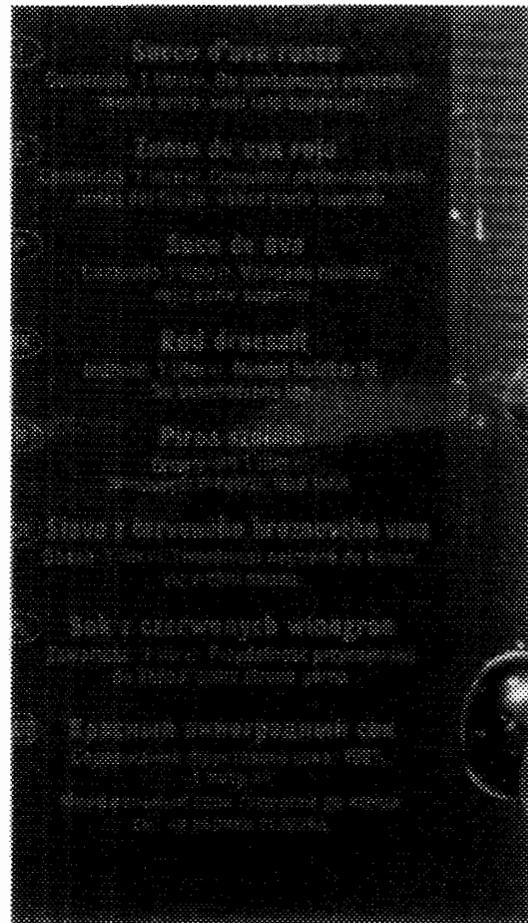
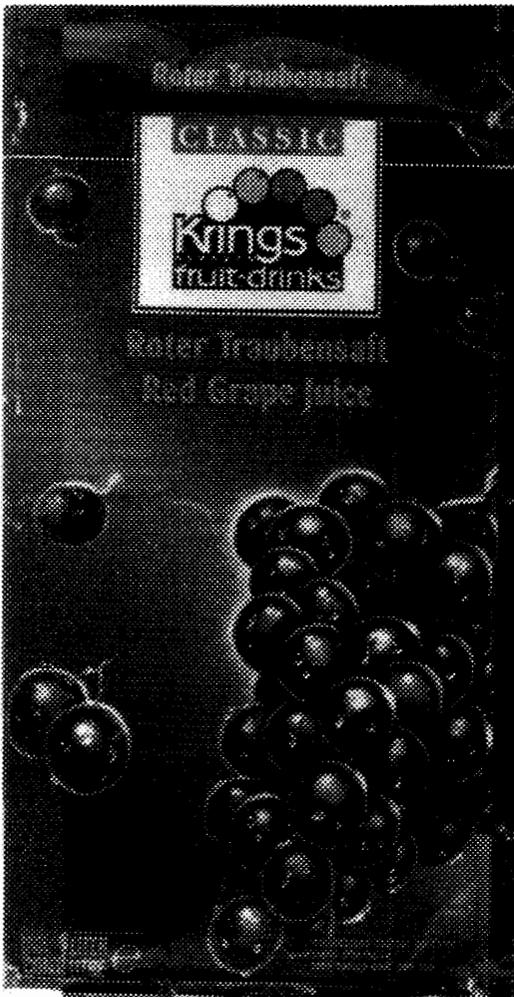
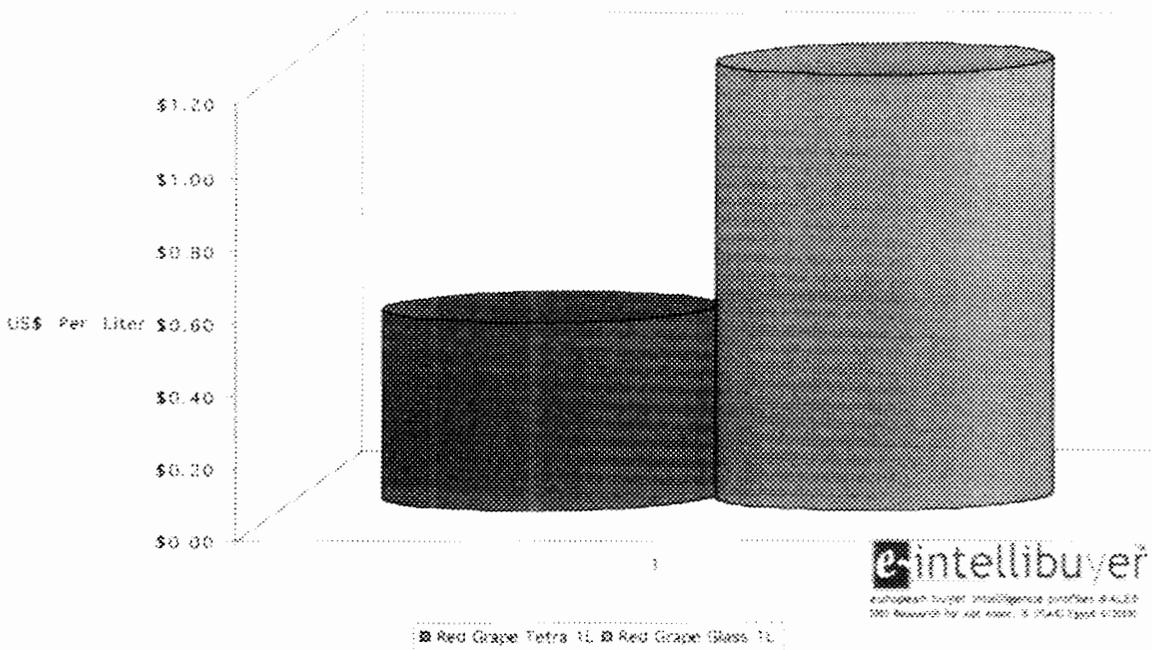
The high-end Albi package is a clear glass bottle with a seal-break twist top. The glass is embossed with a "reusable" label and has a triple label with six spot color printing on a relatively cheap 20lb chromecoat paper.

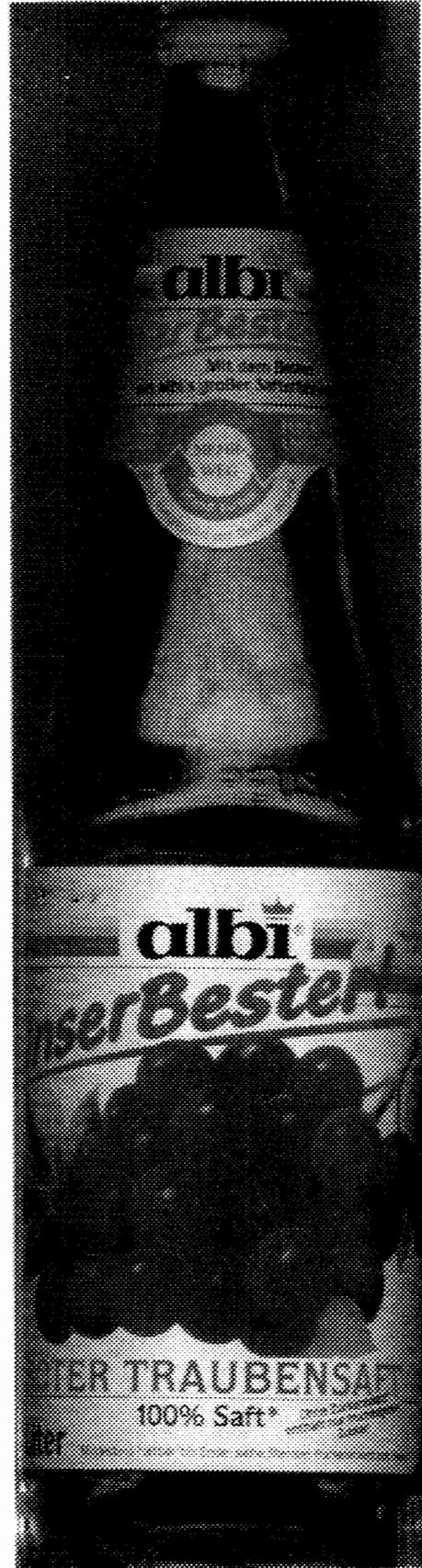
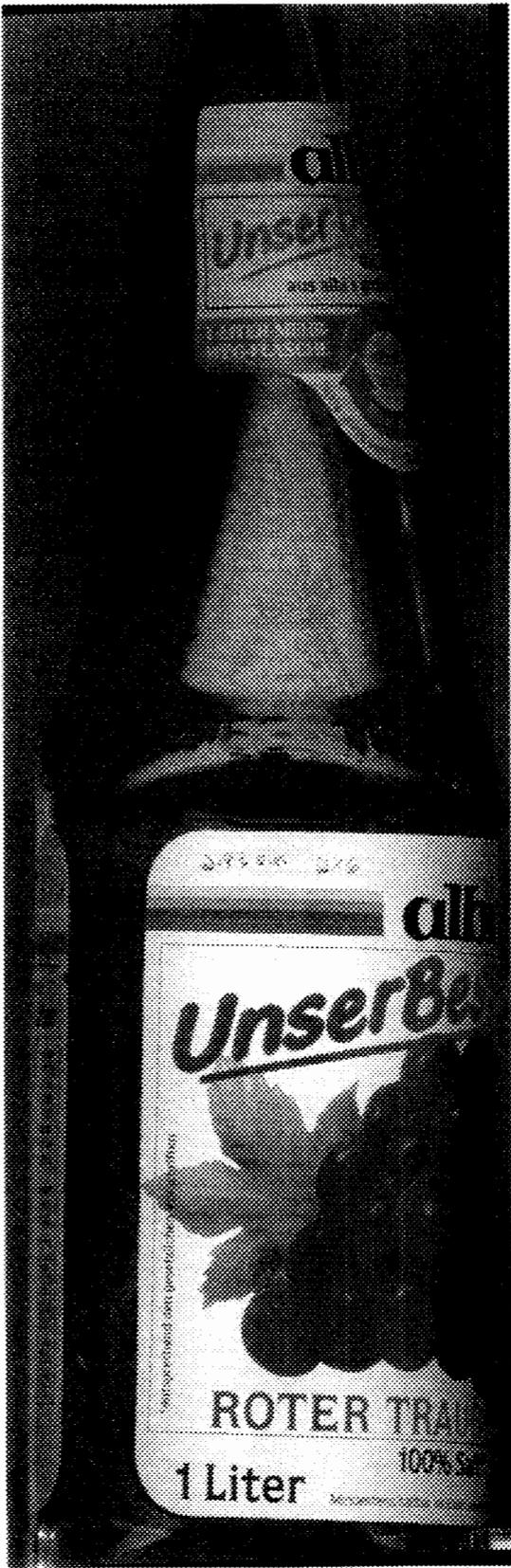
Both of these packages are at the low-end quality of their class, most other glass packs are in green or brown glass, and most other printing is close-registration CMYK four color separation format. Most other tetrapaks have combi or screw top openings. The table below describes, and the images which follow on subsequent pages show, the details of both packages.



	Supermarkets		
	Tengelmann Facia, Tengelmann Group Owner Red Grape Juice	Tengelmann Group Owner Red Grape Juice	Average
Product Type	100%	100%	
Brand	Kriags	Albi	
Net Contents (Liters)	1.000	1.000	1.000
Package Type	Tetra Foil	Clear Glass	
Height cm	16.0	31.0	23.9
Width cm (or diameter if cylindrical)	9.5	9.0	9.3
Depth cm (or diameter if cylindrical)	6.0	9.0	7.5
Shelf Space (Cubic Centimeters)	22,982	30,132	26,557
Price Local Currency (DM)	1.29 DM	2.99 DM	2.14 DM
Price in USD Retail per Package	\$0.59	\$1.37	\$0.98
USD/Liter of Single Strength Equivalent	\$0.59	\$1.37	\$0.98
Estimated 2000 Retailer Acquisition Contract Price			
US\$/Package	\$0.52	\$1.20	\$0.86
US\$/Liter of Single Strength Equivalent	\$0.52	\$1.20	\$0.86
Estimated Packaging Specifications (reverse engineered)	Foilbacked Tetra short rectangle format w/o screw or combi opening. Carton=.35mm, foil- .1mm, film=.02mm, 6 spot color print w/ wax root.	Clear reusable glass w/ seal-break screw top. Triple label six spot color print on 20lb chromecoat.	
Brix	15.0	15.0	15.0
SRD 4 Panel Taste Preference (1-10 scale all fruit juices)	2.8	7.3	9.0
Shelf Life in Months from POP	10.0	16.0	13.0

SUPERMARKETS Estimated Retail Acquisition Contract Prices for Grape Juice in Germany by Package Type May 2000





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

6. Kaufland: Hypermarket Buyer Brief

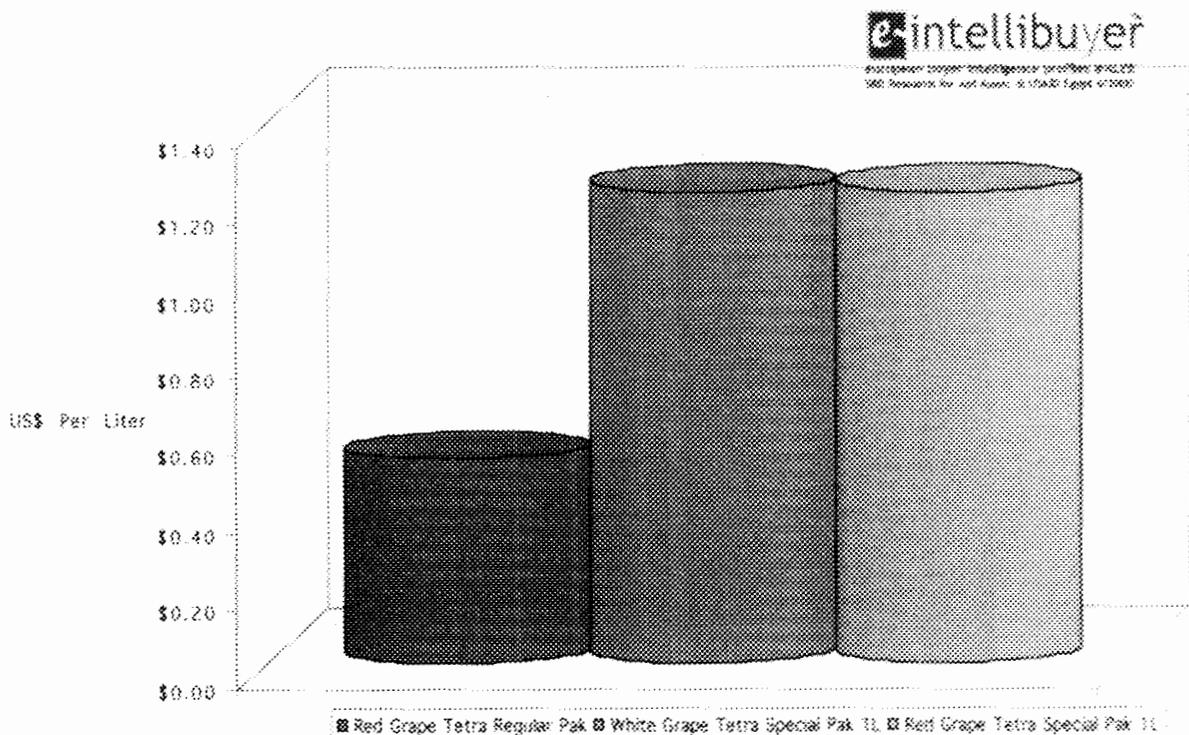
a. Estimated Buyer Acquisition Contract Prices for Hypermarkets



The graph below presents the SRD/e-intellimarc estimates of the acquisition contract price paid on average by hypermarket chains for all product types and package sizes. these

estimates do not measure a specific transaction. They are intended only as general guidelines based on estimated margins and import product costs.

HYPERMARKETS Estimated Retail Acquisition Contract Prices for Grape Juice in Germany by Package Type May 2000





b. Kaufland Estimated Buyer Acquisition Contract Prices and Shelf Space Allocation

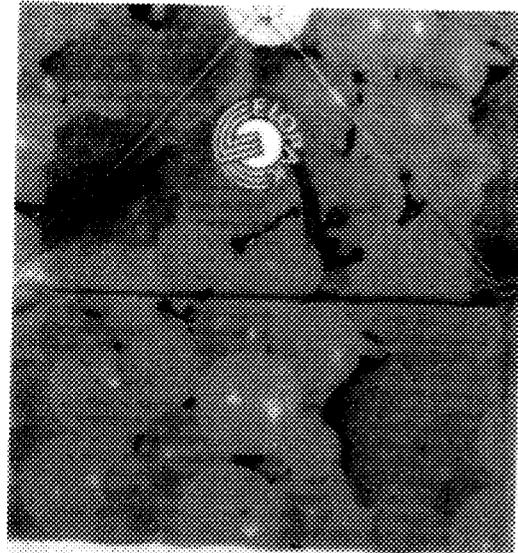
The estimates on this page provide more precise estimates of acquisition costs for specific chains, different types of products, different packaging types and sizes. The acquisition price estimates by package size and type can give potential exporters a more refined idea of the quality and price relationships 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.



	Hypermarkets			Average
	Kaufland	Fooca, Lidl & Schwarz	Owner	
Product Type	Red Grape Juice 100%	White Grape Juice 100%	Red Grape Juice 100%	
Brand	Hardthof	Lindavia	Lindavia	
Net Contents (Liters)	1.000	1.000	1.000	1.00
Package Type	Tetra Foil	Tetra Foil	Tetra Foil	
Height cm	16.8	19.2	19.2	18.40
Width cm (or diameter if cylindrical)	9.5	7.0	7.0	7.93
Depth cm (or diameter if cylindrical)	6.0	7.0	7.0	6.67
Shelf Space (Cubic Centimeters)	91,930	22,579	15,053	43,187
Price Local Currency (DM)	1.29 DM	2.99 DM	2.99 DM	2.42 DM
Price in USD Retail per Package	\$0.59	\$1.37	\$1.37	\$1.11
USD/Liter of Single Strength Equivalent	\$0.59	\$1.37	\$1.37	\$1.11
Estimated 2000 Retailer Acquisition Contract Price				
US\$/Package	\$0.59	\$1.22	\$1.22	\$0.99
US\$/Liter of Single Strength Equivalent	\$0.59	\$1.22	\$1.22	\$0.99
Estimated Packaging Specifications (reverse engineered)	Foilbacked Tetra short rectangle format w/ro screw or combi opening.	Foilbacked Tetra MB Carton tent top Format w Screw Opening.	Foilbacked Tetra MB Carton tent top Format w Screw Opening.	
	Carton= 35mm, foil= 1mm, Film= 0.02mm 4 color CMYK sep printing w/ wax.	Carton= 35mm, Foil= 12mm, Film= 0.02mm, 4 Color CMYK sep print w/wax	Carton= 35mm, Foil= 12mm, Film= 0.02mm, 4 Color CMYK sep print w/wax	
Brix	16.0	16.5	16.5	16.3
SRD 4 Panel Taste Preference (1-10 scale all fruit juices)	4.4	6.7	5.4	5.5
Shelf Life in Months from POP	11.2	7.0	9.0	9.1

c. Kaufland Packaging



Lindavia
Trink
Obst
weißer Traubensaft

Lindavia

Verlesene Trauben werden geküchelt,
filtriert und auf schonende Weise
behandelt, so daß die wertvollen
natürlichen Bestandteile weitgehend
erhalten bleiben.

FRUCHTGEHALT 100%

weißer Traubensaft
Fruchtgehalt: 100%

Geöffnet zum baldigen Genuß
empfohlen.

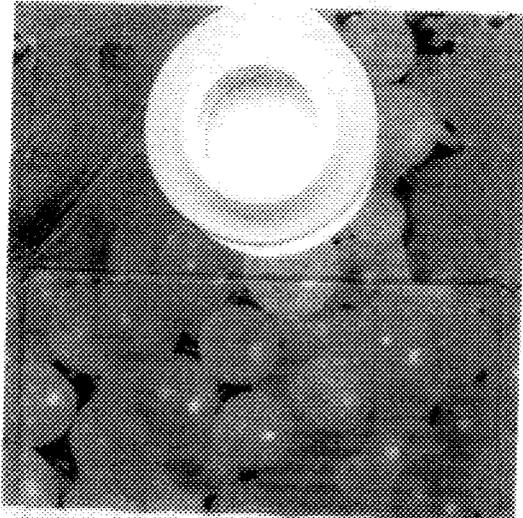
Fruchtsaft

1 Liter

1 Liter

21.12.2000 11:05

Mindestens haltbar bis: ↑



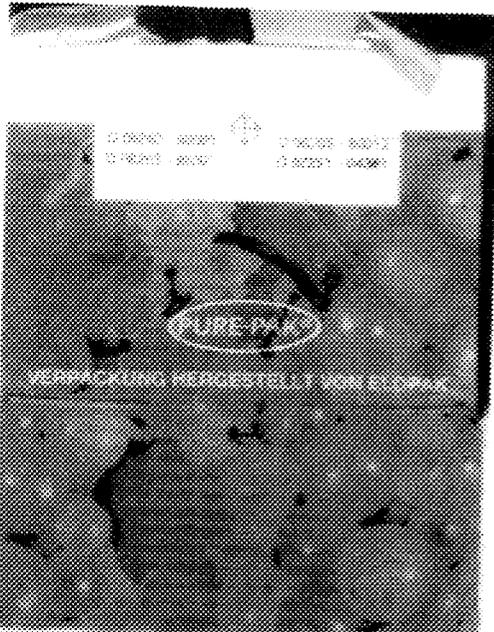
Lindavia
Trink Obst
weißer Traubensaft

333 244 000

FRUCHTGEHALT 100%

Fruchtsaft

1 Liter



21.12.2000 11:05
21.12.2000 11:05

PURE DRINK

HERSTELLUNG HERGESTELLT VON EDELMAN



Verpackungskappe abdrehen. Mit beiden Daumen den Auslöser eindrücken bis nur noch Auslöser und Gewinde sichtbar sind. Zum Verdrücken drückt Kappe aufwärts und festdrücken.

6.7
kauf 16.5 = 0.7

weißer Traubensaft

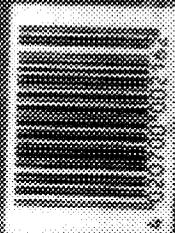
Fruchtgehalt: 100%

Geöffnet vom halbdigen Genuss genießen.



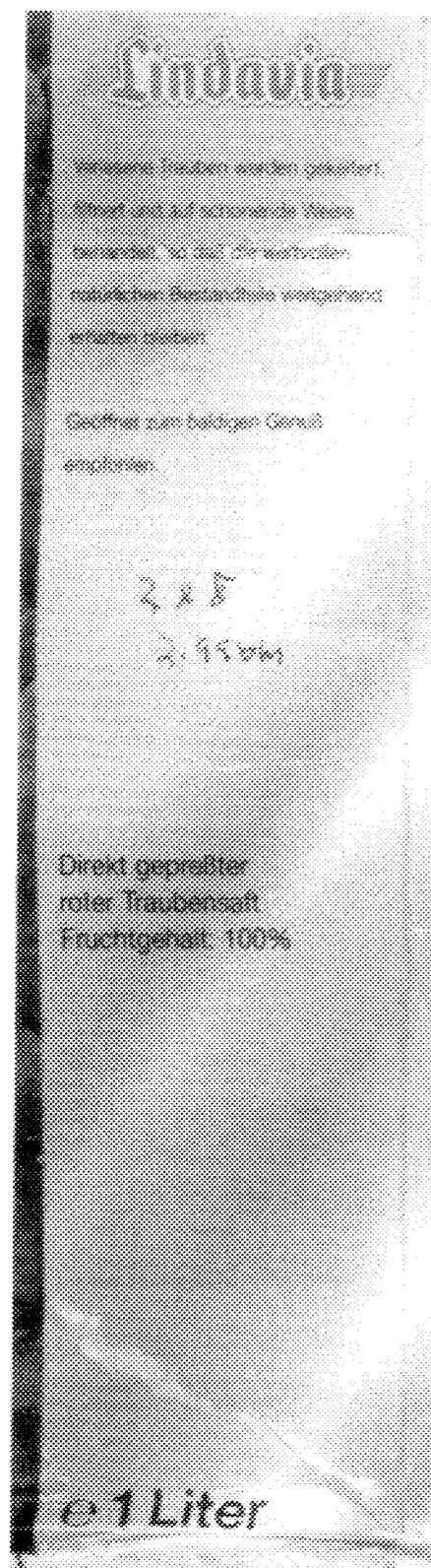
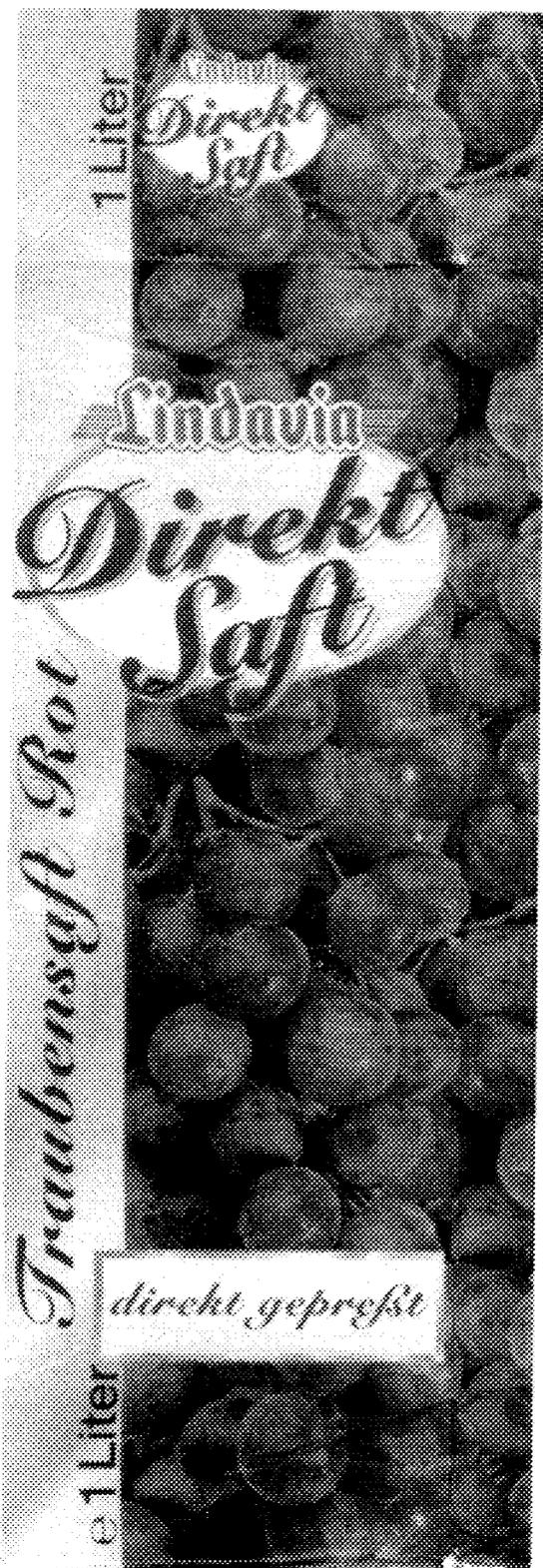
Mindestens haltbar bis:
siehe Packungsbeilage

Losbrüche
Verpackungsgröße: 1,5 Liter
© 2000 Lindem (Dachau)



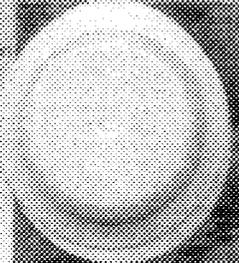
1 Liter





Mindestens haltbar bis ↑

Mindestens haltbar bis ↑



Lindavia

Direkt Saft

Traubensaft Rot

direkt gepresst

e 1 Liter

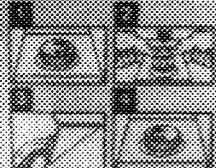
Mindestens haltbar bis ↑

PURE-PAK®

HERGESTELLT VON ELOPAK

Direkt gepresster
roter Traubensaft
Fruchtgehalt: 100%

Nach dem Öffnen sich
schließen und
innerhalb von 7-10 Tagen
verbrauchen.



Das Produkt enthält keine
Lebenden Organismen von Aussehen
unterschiedlich als vor dem Öffnen.
Nicht und Gerüche werden nicht.
Zum Verschleiden einfach Wasser
schütten und ausspülen.

Quantitativer Gehalt
pro 100 ml

Energie	460 kJ/110 kcal
Zucker	12 g
Antioxidantien	15,5 mg
Antioxidantien	15,5 mg
Zucker	12 g
Antioxidantien	15,5 mg
Energie	460 kJ/110 kcal
Zucker	12 g
Antioxidantien	15,5 mg
Energie	460 kJ/110 kcal



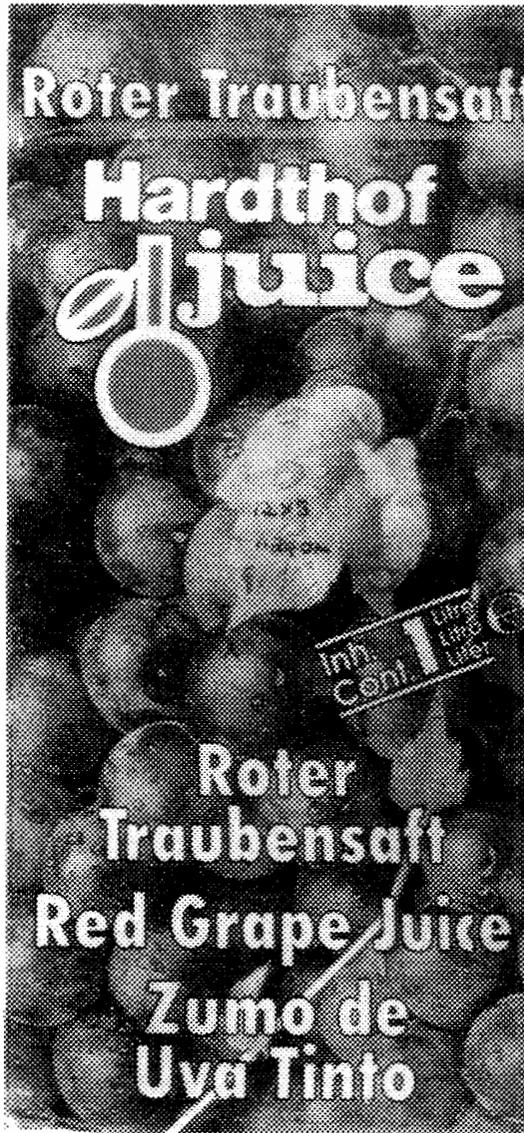
Mindestens haltbar bis
siehe Packungsanweisung

Lindavia Vertriebsgesellschaft mbH
48131 Lindau, Germany

e 1 Liter

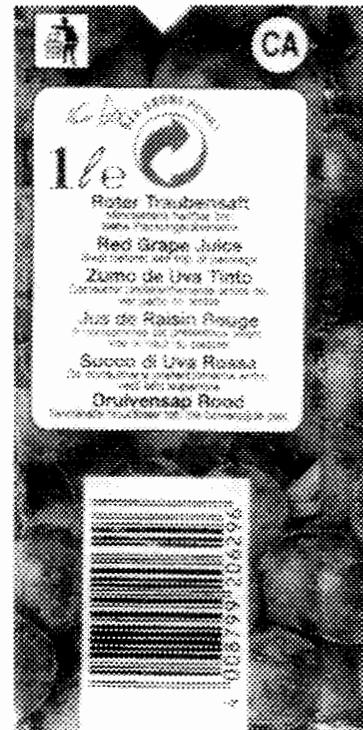


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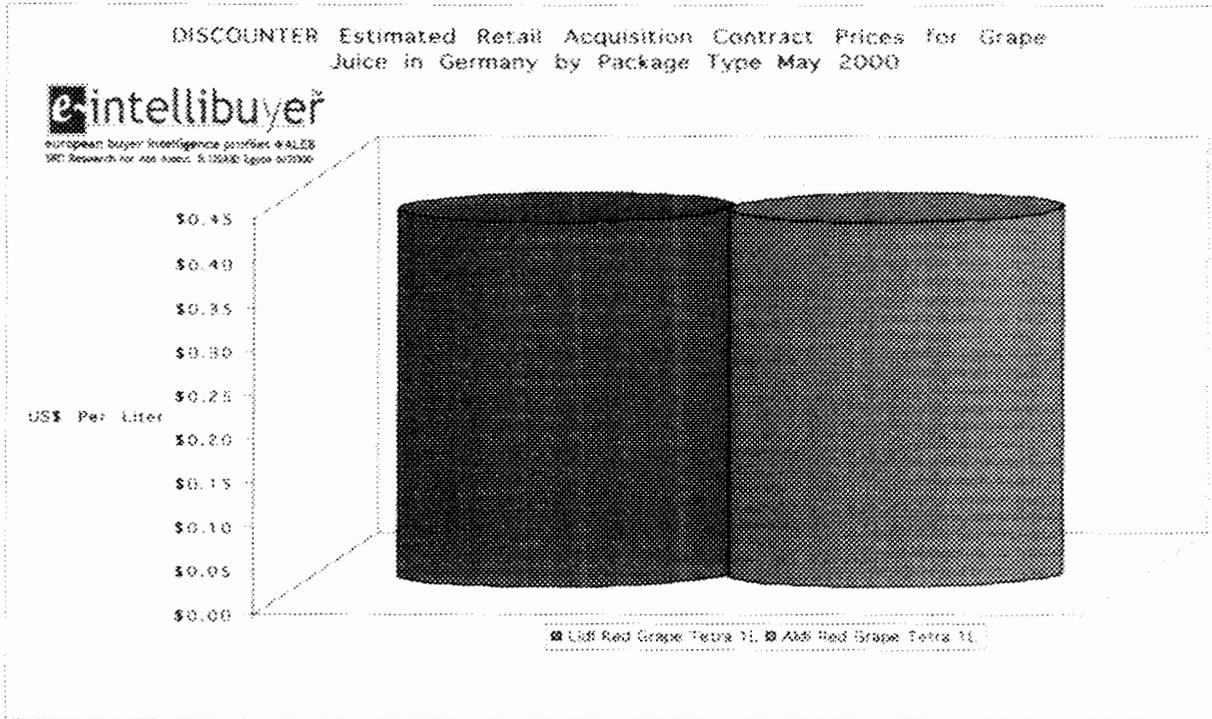


7.Lidl and Aldi: Discounter Buyer Briefs

a. Estimated Buyer Acquisition Contract Prices for All Discounters

The graph below presents the SRD/*e-intellimarc* estimates of the acquisition contract price paid on average by all discounter format chains for all product types and package sizes.

These estimates do not measure a specific transaction. They are intended only as general guidelines based on estimated margins and import product costs.



b. Lidl and Aldi Estimated Buyer Acquisition Contract Prices & Shelf Space Allocation

The estimates on this page provide more precise estimates of acquisition costs for specific chains, different types of products, different packaging types and sizes. 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

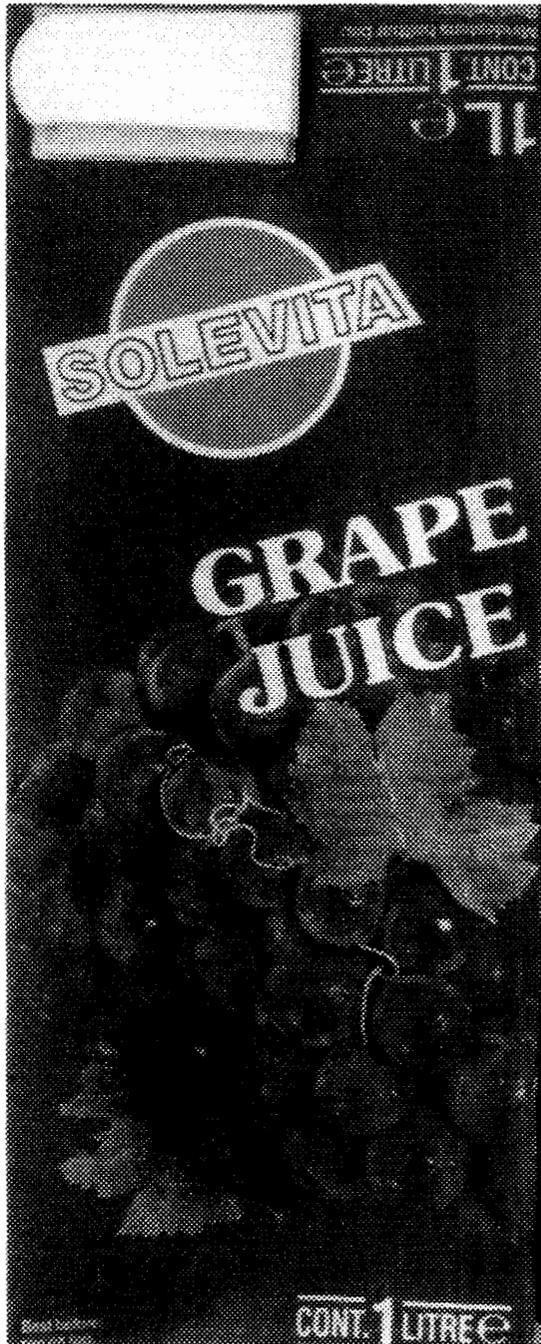
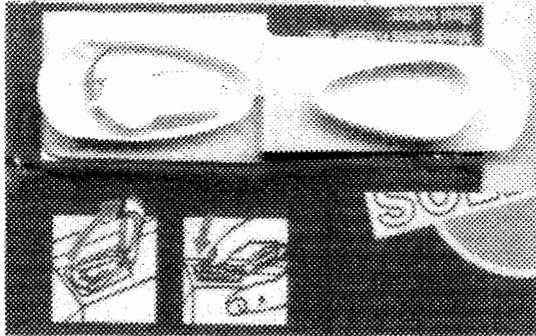
chains do not release their actual acquisition contract pricing for public information. These estimates are based on SRD's best secondary information on retail to acquisition margins, applied to direct measurements of actual retail sales prices. They should be used only as preliminary indicators, and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



e-intellibuyer
 european buyer intelligence profiles #4228
 SRD Research for eze koozt, 5/19/00 tppst 4/2000

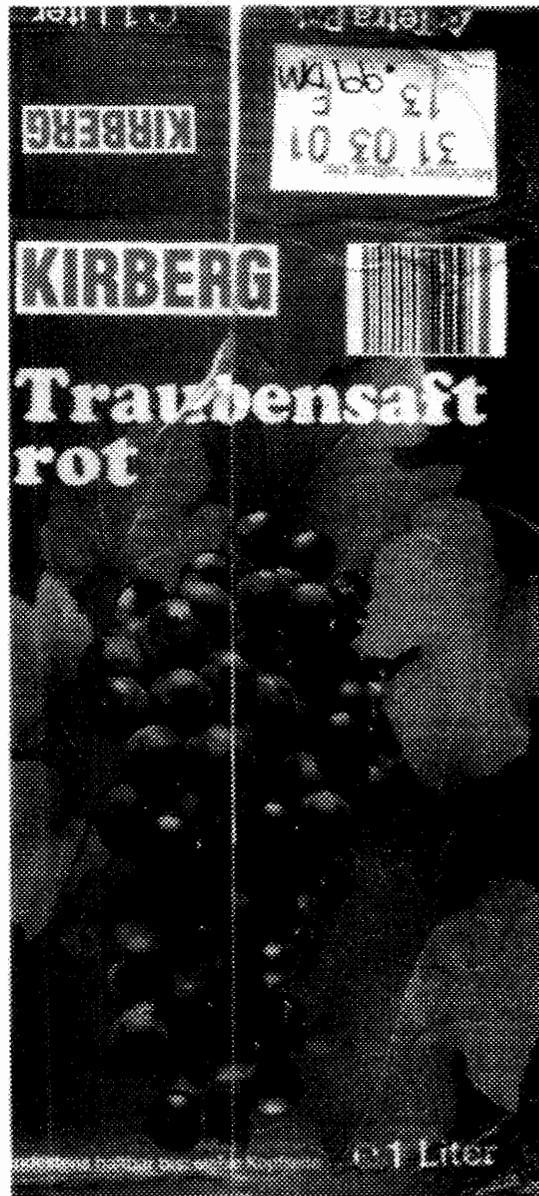
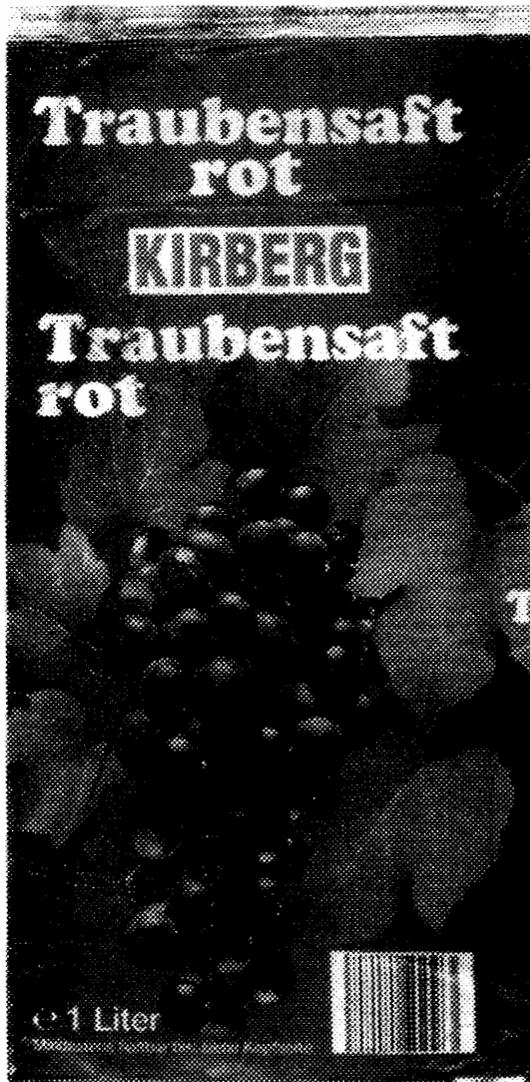
	Discounters		Average
	Lidl	Aldi	
Product Type	Red Grape Juice	Red Grape Juice	
	100%	100%	
Brand	Solevita	Kirberg	
Net Contents (Liters)	1.000	1.000	1.000
Package Type	Tetra Foil	Tetra Foil	
Height cm	19.0	16.5	17.8
Width cm (or diameter if cylindrical)	8.8	9.3	9.1
Depth cm (or diameter if cylindrical)	6.0	6.3	6.2
Shelf Space (Cubic Centimeters)	481,536	541,372	511,454
Price Local Currency (DM)	0.99 DM	0.99 DM	0.99 DM
Price in USD Retail per Package	\$0.45	\$0.45	\$0.45
USD/Liter of Single Strength Equivalent	\$0.45	\$0.45	\$0.45
<i>Estimated 2000 Retailer Acquisition Contract Price</i>			
	US\$/Package	\$0.42	\$0.42
	US\$/Liter of Single Strength Equivalent	\$0.42	\$0.42
<i>Estimated Packaging Specifications (reverse engineered)</i>			
	Fullbacked Tetra tall rectangle format w/ comb opening, Carton, 35, Foils, 1, Film, 02, 4 color CMYK sepia print w/wax.	Fullbacked Tetra short rectangle format w/o screw or comb opening, Carton, 35, Foils, 1, Film, 02, 4 color CMYK sepia print w/wax.	
	Brix	15.3	17.4
SRD 4 Panel Taste Preference (1-10 scale all fruit juices)		3.0	5.0
Shelf Life in Months from DDD		11.0	10.0

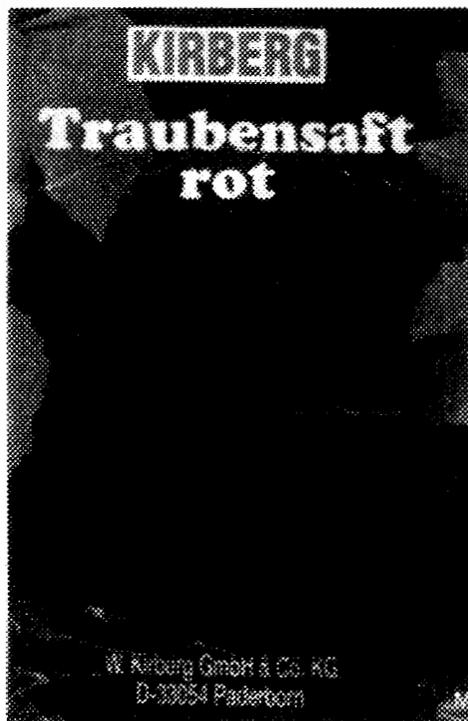
c. Lidl Packaging





d. Aldi Packaging



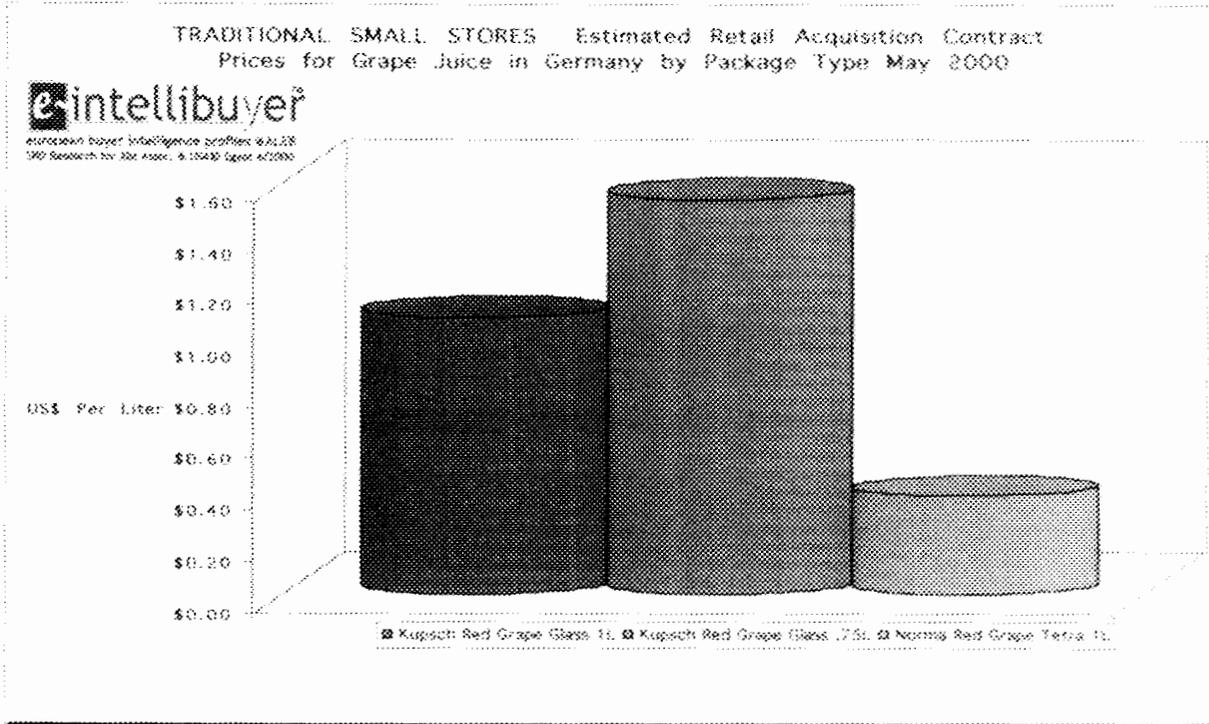


8.Kupsch and Norma: Traditional Small Store Buyer Briefs

a. Estimated Buyer Acquisition Contract Prices for All Small Stores

The graph below presents the SRD/e-intellimarc estimates of the acquisition contract price paid on average by all small stores for all product types and package sizes. These

estimates do not measure a specific transaction. They are intended only as general guidelines based on estimated margins and import product costs



*Wir zeigen
immer
ein Lächeln.*

In aller Frische. **kupsch**

b. Kupsch and Norma: Estimated Buyer Acquisition Contract Prices & Shelf Space Allocation

The estimates on this page provide more precise estimates of acquisition costs for specific chains, different types of products, different packaging types and sizes. 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.



Traditional Small Stores		Norma Fac/Own		Average
Kupsch Fac./Owner	Red Grape Juice	Red Grape Juice	Red Grape Juice	
100%	100%	Labeled 100%		
Bayla	Eckes	Trimm Star		0.92
1.000	0.750	1.000		
Clear Glass	Green Glass	Tetra Foil		25.83
31.0	30.0	16.5		8.43
9.0	7.0	9.3		7.40
9.0	7.0	6.2		65.454
30,132	23,520	142,709		2.26 DM
2.79 DM	2.99 DM	0.99 DM		\$1.04
\$1.28	\$1.37	\$0.45		\$1.13
\$1.28	\$1.83	\$0.45		
\$1.07	\$1.15	\$0.38		\$0.87
\$1.07	\$1.53	\$0.38		\$1.00
Clear glass w/ seal-break screw top. Triple label 4 color CMYK sep print on 20lb chromecoat.	Green Glass w/ seal-break screw top. Triple label 4 color CMYK seps print on 20lb chromecoat.	Foilbacked Tetra short rectangle format w/o screw or combi opening. Carton=.35, Foil=.1, Film=.02. 4 color CMYK seps print w/wax.		
15.0	16.0	16.3		15.8
6.8	8.8	4.2		6.6
21.0	13.0	8.0		14.0

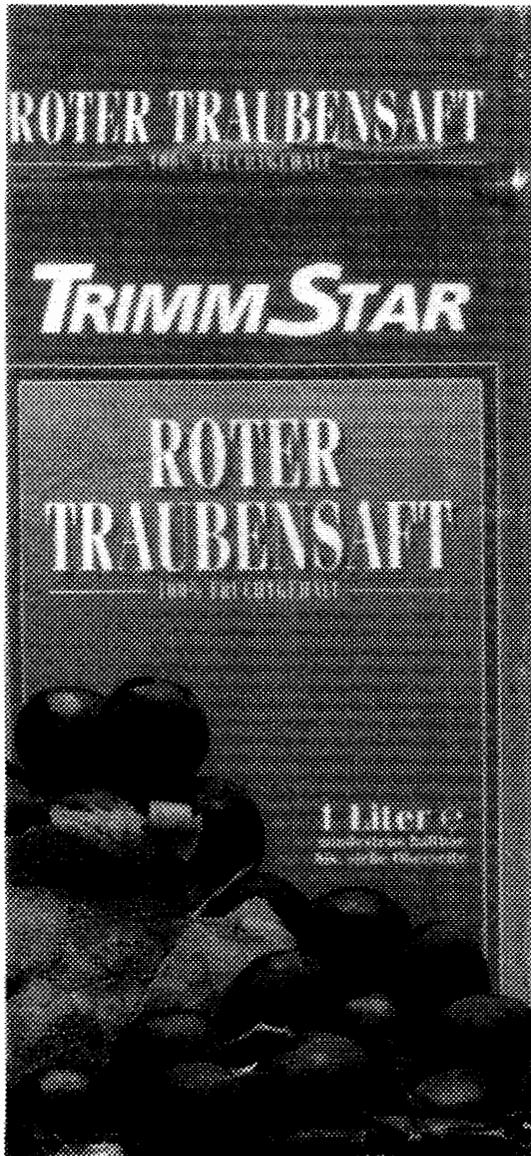


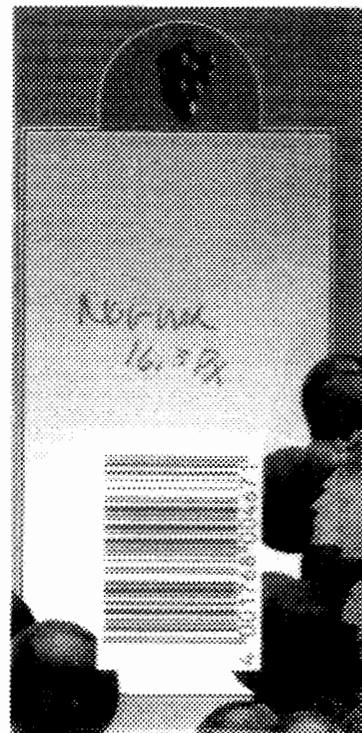
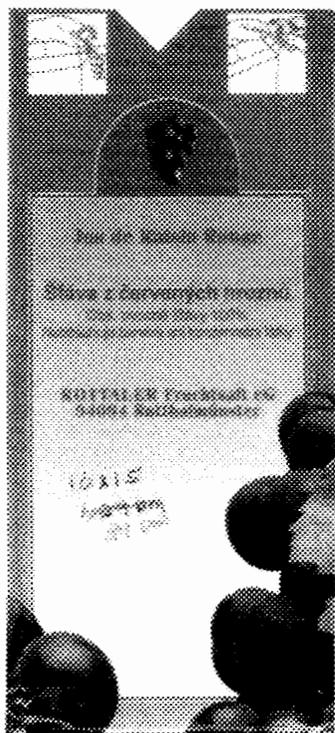
2.29
 2.20
Bayla
Roter Traubensaft
 Fruchtgehalt: 100 %
 8015
 406,75
 Kupsch
 1 Liter

 Goldfruchtsäfte • Franz G. Brandt

Bayla
die die guten Säfte machen
 Für große und kleine Genießer
Roter Traubensaft
 Bayla Roter Traubensaft ist ein harmonischer und leichter Saft aus reifen Trauben. Sie verleihen ihm seine rote und saure Fruchtart.
 Wir garantieren eine gepöflte, gleichbleibende und hohe Qualität.
 Bayla Roter Traubensaft wird entsprechend den gesetzlichen Bestimmungen ohne Konservierungsstoffe und Farbstoffe hergestellt.
 Inhaltsstoffe:
 1 Liter
 Nährwerte pro 100 ml:
 Energie 40 kcal
 Fett 0 g
 Kohlenhydrate 10 g
 davon gesättigte Fettsäuren 0 g
 Eiweiß 0 g
 Salz 0 g
 23,02 € / Liter
 23,03, 02 €

d. Norma Packaging



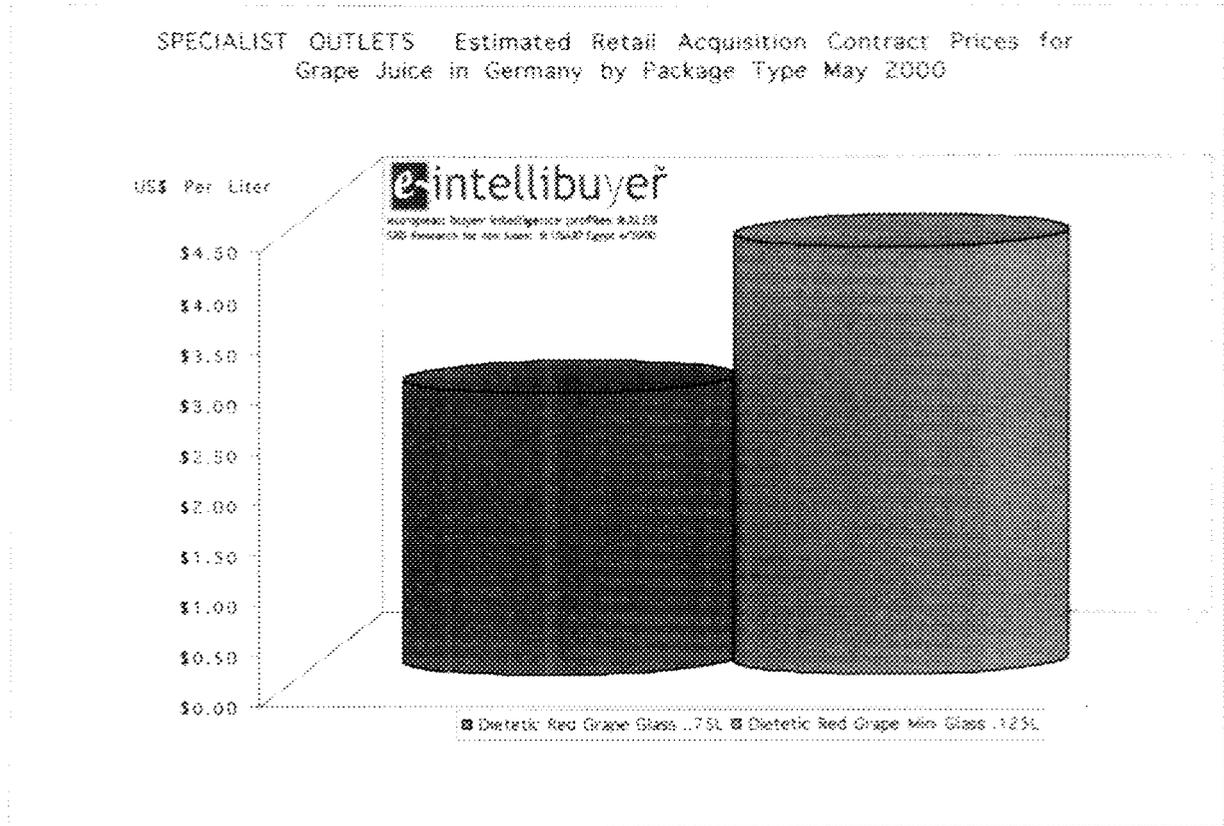


9. Rodetum Apotheke: Specialist Store Buyer Brief

a. Estimated Buyer Acquisition Contract Prices for Specialist Stores

The graph below presents the SRD/e-intellimarc estimates of the acquisition contract price paid on average for specialist stores for all product types and package sizes. These

estimates do not measure a specific transaction. They are intended only as general guidelines based on estimated margins and import product costs.



4/4

b. Roderturm Apotheke: Estimated Buyer Acquisition Contract Prices & Shelf Space Allocation

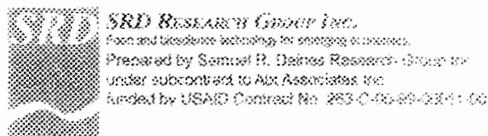
The estimates on this page provide more precise estimates of acquisition costs for specific chains, different types of products, different packaging types and sizes. The acquisition price estimates by package size and type can give potential exporters a more refined idea of the quality and price relationships 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.



Product Type	Specialists		Average
	Roderturm Apotheke	Dietetic Red	
Brand	Dr. Stenberger	Dr. Stenberger	
Net Contents (Liters)	0.750	0.125	0.438
Package Type	Brown Glass	Brown Glass	
Height cm	28.5	13.5	21.0
Width cm (or diameter if cylindrical)	7.0	4.3	5.7
Depth cm (or diameter if cylindrical)	7.0	4.3	5.7
Shelf Space (Cubic Centimeters)	6,379	4,493	6,436
Price Local Currency (DM)	9.95 DM	1.50 DM	3.73 DM
Price in USD Retail per Package	\$2.73	\$0.69	\$1.71
USD/Liter of Single Strength Equivalent	\$3.64	\$5.51	\$4.58
<i>Estimated 2000 Retailer Acquisition Contract Price</i>			
US\$/Package	\$2.10	\$0.53	\$1.32
US\$/Liter of Single Strength Equivalent	\$2.80	\$4.24	\$3.52
<i>Estimated Packaging Specifications (reverse engineered)</i>			
	Brown glass w/ seal-break screw top	Brown, non-glass w/ seal-break screw top	
	Triple label 4 color	Double label 4 color	
	CMYK sep print on 20% chromecast	CMYK sep print on 20% chromecast	
Brix	16.0	17.5	16.8
SRD 4 Panel Taste Preference (1-10 scale all fruit juices)	7.0	8.5	7.8
Shelf Life in Months from DOP	12.0	12.5	12.3

c. Rodeturm Apotheke Packaging





an ALEB/SRD *expomarc* profile
for export opportunity identification