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Egyptian FROZEN green beans in the French Market

Supporting Egypt's Processed Foods Export Industry

Prepared By Agriculture-Led Export Businesses (ALEB)

June 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
supporting Egypt's processed foods export industry

SRD

an ALEB/SRD expomarc profile
for export opportunity identification

Egyptian FROZEN green beans in the French Market

e-intellimarc
food market & buyer intelligence for europe @ ALEB

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Cambridge, U.K.

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

SRD *SRD Research Group Inc.*
Food and bioscience 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*
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LES POÊLÉES
Saveur
HARICOTS VERTS
AUX PETITS LARDONS
Déjà cuisiné
aux oignons
et à la ciboulette
7 MN À LA POÊLE
50 g

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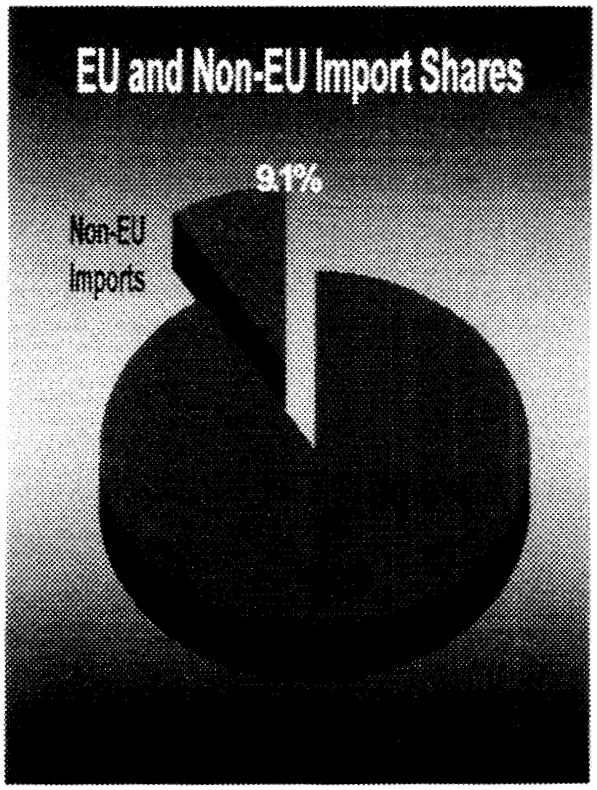
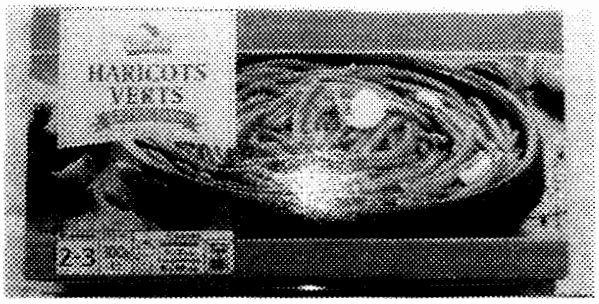
PART ONE: MARKET INTELLIGENCE

1. Export Opportunity Identification

a. Size of the French Import Market for Frozen Green Beans by Source

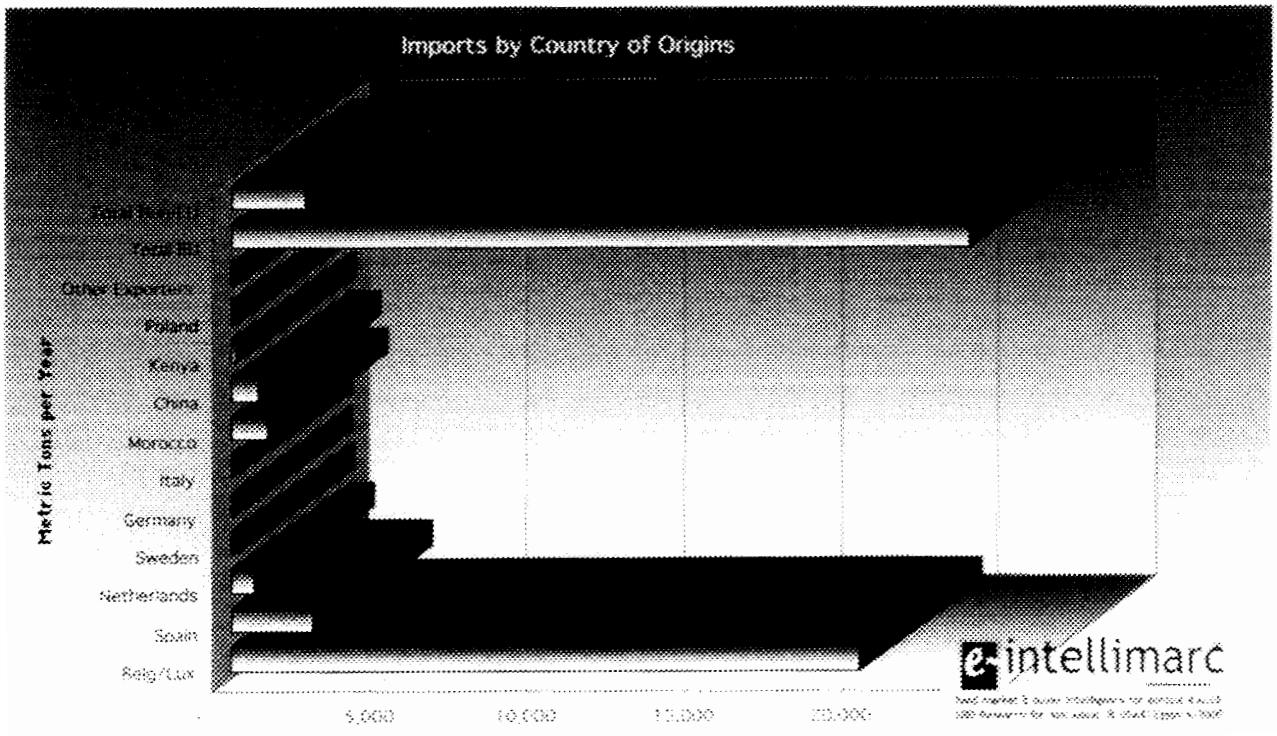
The tables and charts on this page measure the metric tons of imported product received from each supplying country during 1998 and the percentage share each has in the French import market. These tables and charts assist in identifying the size and competitive structure of the French frozen bean export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



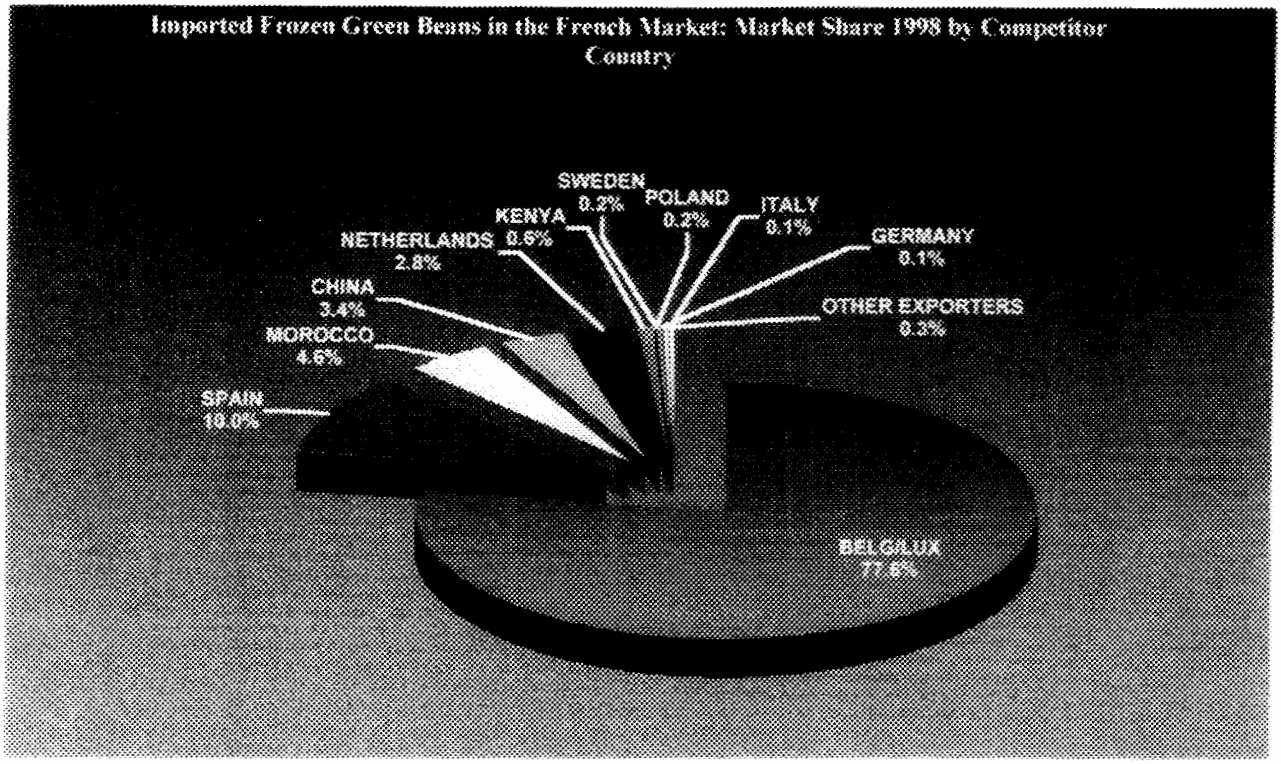


Competitor Market Size and Share for Imported Frozen Green Beans in the French Market 1998

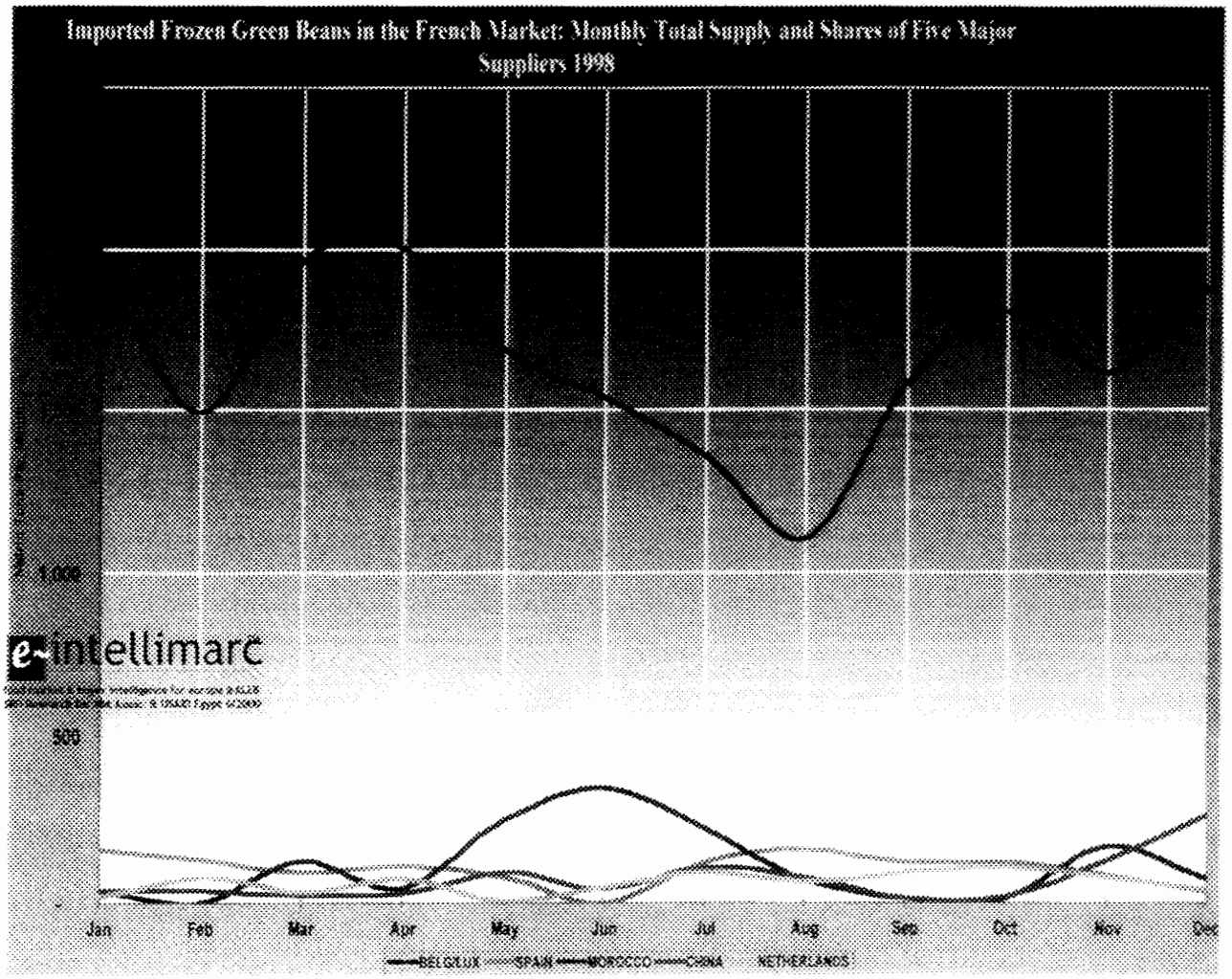
EU Source	MT/Yr	% Share
Belg/Lux	19,991	77.5%
Spain	2,580	10.0%
Netherlands	729	2.8%
Sweden	93	0.4%
Germany	39	0.1%
Italy	29	0.1%
Total EU	23,460	90.9%
Non-EU Source		
Morocco	1,174	4.5%
China	880	3.4%
Kenya	152	0.6%
Poland	64	0.2%
Other Exporters	73	0.3%
Total Non-EU	2,342	9.1%
Total Imports	25,802	100.0%



b. Import Market Share by Competitive Supplier Country



2. Monthly Import Quantities by Supplier Country



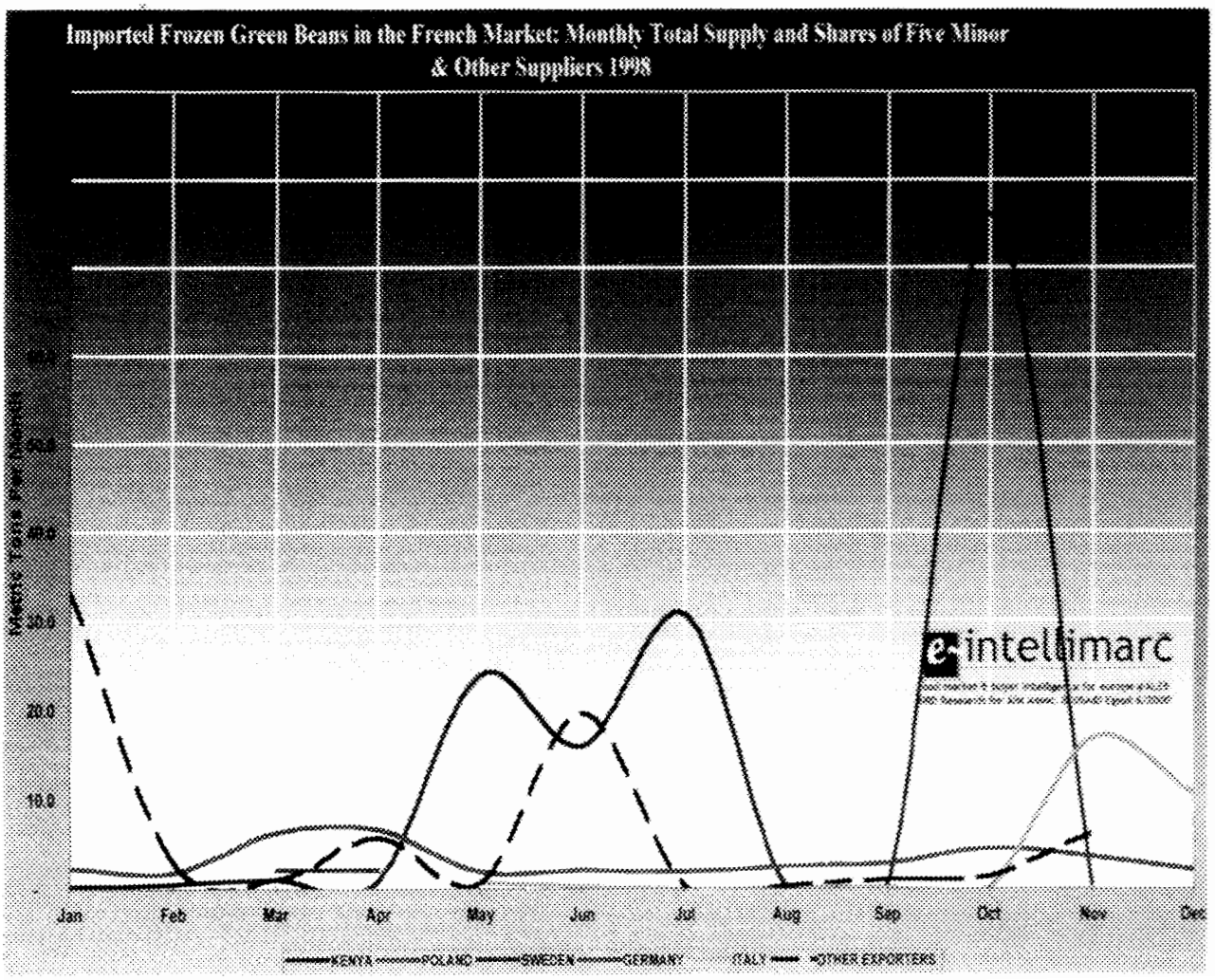
The graphs and tables on this page measure the monthly quantity, in metric tons, of frozen green beans imported into France from each of the indicated supplier countries during 1998. With these charts and tables it is possible to compare the seasonality of import supplies from major and minor suppliers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

Monthly Imports From Top Five Competitor Suppliers for Frozen Green Beans into the French Market 1998

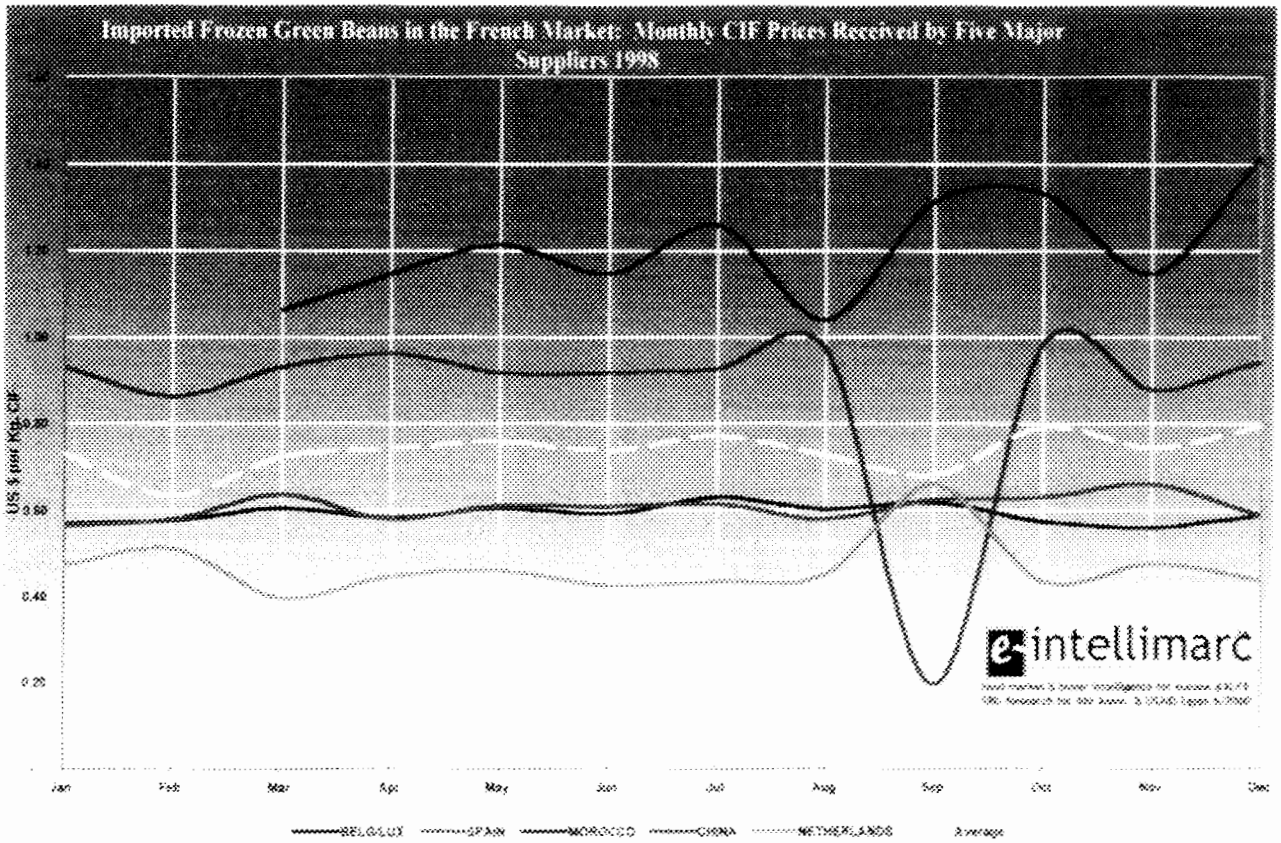
Metric Tons/Month	BELGIUM	SPAIN	MOROCCO	CHINA	NETHERLANDS
January	1,934	163	38	41	17
February	1,498	130	-	41	79
March	1,969	95	129	25	32
April	2,002	112	43	28	74
May	1,684	80	252	91	6
June	1,539	-	345	43	48
July	1,360	122	223	106	95
August	1,108	159	69	78	63
September	1,588	123	15	16	91
October	1,810	130	15	20	107
November	1,620	82	172	127	80
December	1,881	35	73	265	37
TOTAL	19,991	2,580	1,174	880	729

Monthly Imports From Smaller and Other Competitor Suppliers for Frozen Green Beans into the French Market 1998

Metric Tons/Month	KENYA	POLAND	SWEDEN	GERMANY	ITALY	OTHER EXPORTERS
January				2		33
February	1			2		3
March	1		2	6		1
April	1		2	7		6
May	24	22		2	1	1
June	16		38	2		20
July	31			2		0
August	0			3		0
September	1	20		3		1
October	76			4		1
November	1			4	17	6
December		22		2	11	
Total	152	64	43	39	29	73



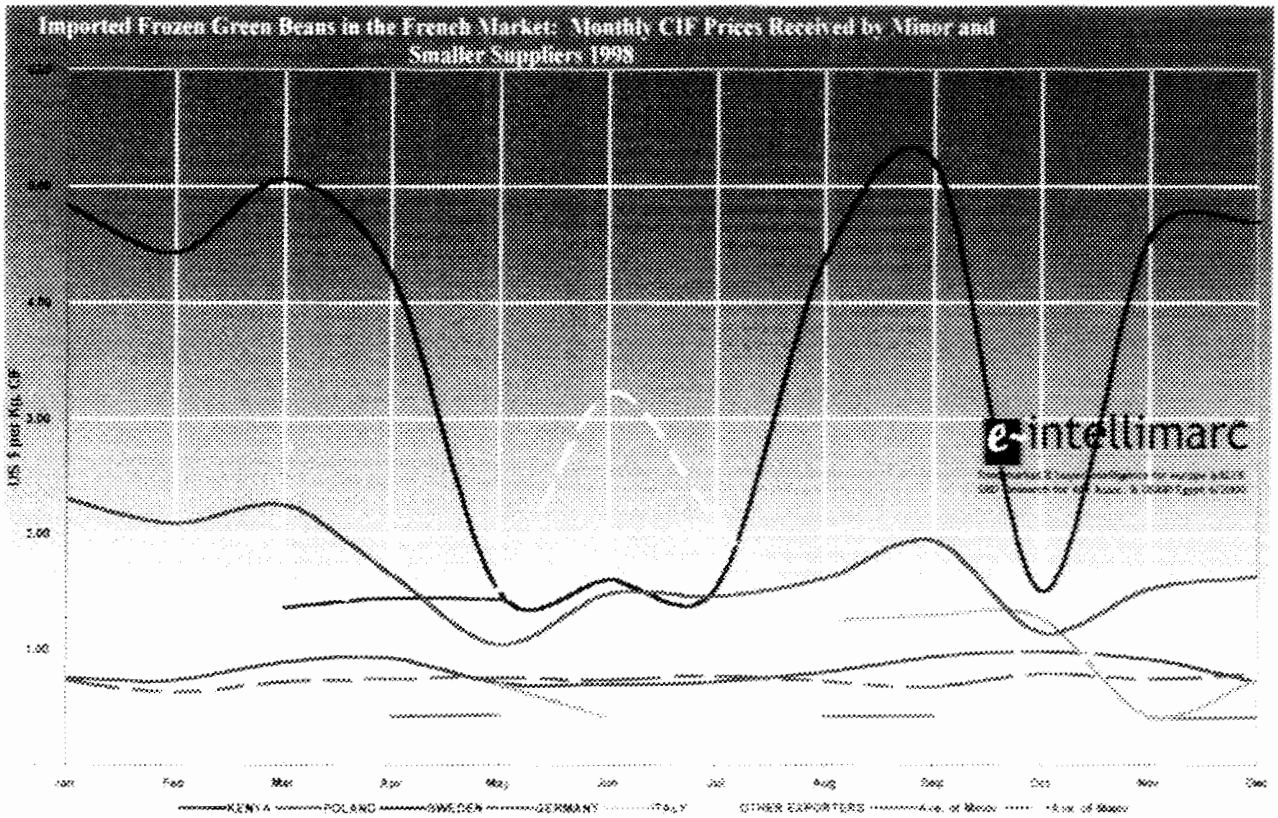
3. CIF Import Prices by Month and Competitor.



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 major (this page) and minor (opposite page) supplying countries of imported frozen green beans into France 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.

Monthly CIF Import Prices Received by Top Five Competitor Suppliers for Frozen Green Beans into the French Market 1998

US$/Kg. CIF	BELG/LUX	SPAIN	MOROCCO	CHINA	NETHERLANDS	Average
January	$0.57	$0.56	$1.13	$0.93	$0.48	$1.47
February	$0.58	$0.58	$0.00	$0.86	$0.51	$1.14
March	$0.61	$0.64	$1.07	$0.93	$0.40	$1.45
April	$0.58	$0.58	$1.15	$0.96	$0.45	$1.49
May	$0.60	$0.61	$1.22	$0.92	$0.46	$1.53
June	$0.59	$0.61	$1.15	$0.92	$0.43	$1.48
July	$0.63	$0.61	$1.26	$0.93	$0.43	$1.55
August	$0.60	$0.58	$1.04	$0.97	$0.45	$1.46
September	$0.62	$0.63	$1.32	$0.99	$0.66	$1.69
October	$0.58	$0.63	$1.33	$0.99	$0.44	$1.59
November	$0.56	$0.66	$1.15	$0.88	$0.48	$1.49
December	$0.59	$0.59	$1.42	$0.94	$0.44	$1.59
Average	$0.59	$0.61	$1.10	$0.94	$0.47	$1.49



By comparing these CIF prices with the estimated product, packing, packaging costs, insurance and freight to France from Egypt, it 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. The dotted lines in the charts indicate the average for major and minor exporters as a group. Comparison of a processor's estimated "breakeven" CIF price in France with these averages can provide a useful preliminary screening criterion of export viability.

Monthly CIF Import Prices Received by Smaller and Other Competitor Suppliers for Frozen Green Beans into the French Market 1998

US$/Kg. CIF	KENYA	POLAND	SWEDEN	GERMANY	ITALY	OTHER EXPORTERS	Average
January	$1.35	$0.00	$0.00	$0.76	$0.00	$1.35	$0.57
February	$4.44	$0.00	$0.00	$0.74	$0.00	$1.09	$1.05
March	$5.06	$0.00	$1.38	$0.90	$0.00	$1.69	$1.51
April	$4.23	$0.43	$1.45	$0.93	$0.00	$1.27	$1.39
May	$1.49	$0.44	$1.44	$0.71	$0.70	$1.53	$1.05
June	$1.61	$0.00	$0.00	$0.70	$0.41	$1.23	$0.99
July	$1.54	$0.00	$0.00	$0.73	$0.00	$2.10	$0.73
August	$4.39	$0.43	$0.00	$0.80	$1.26	$1.26	$1.36
September	$5.19	$0.42	$0.00	$0.94	$1.30	$1.89	$1.62
October	$1.51	$0.00	$0.00	$0.99	$1.28	$0.82	$0.77
November	$4.57	$0.40	$0.00	$0.92	$0.43	$1.33	$1.27
December	$4.70	$0.41	$0.00	$0.72	$0.73	$1.00	$1.36
Average	$3.34	$0.21	$0.36	$0.82	$0.51	$1.60	$1.14

4. Distribution Channels and Estimated Distributor Acquisition Contract Prices

The table to the right estimates the percentage of frozen food which is sold through the five different types of retail stores selected for profiles and briefs in the following sections.

Over the last 20 years, more and more frozen 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

Percent Frozen Food Sales by Retail Format	
Hypermarkets	43.6%
Supermarkets	30.8%
Trad. Grocers	8.6%
Discounters	3.4%
Specialists	13.6%
Total	100.0%

Hyper/Supermarkets

Achuan
Carrefour
Promodes
Gem
Rallye
Casino
USEGO

Midsize Supermarkets

Leclerc
Champion
Shopi
La Ruche
Meridionale
Cora
Intermarche

Discounters

Lidl
Dia
Docks de France
Lo-Cost
Europa Discount
Denner Satelliten
Franprix
La Mutant

Specialty Freezer Centrers

Thiriet
Picard Surgeles

Traditional/Co-op

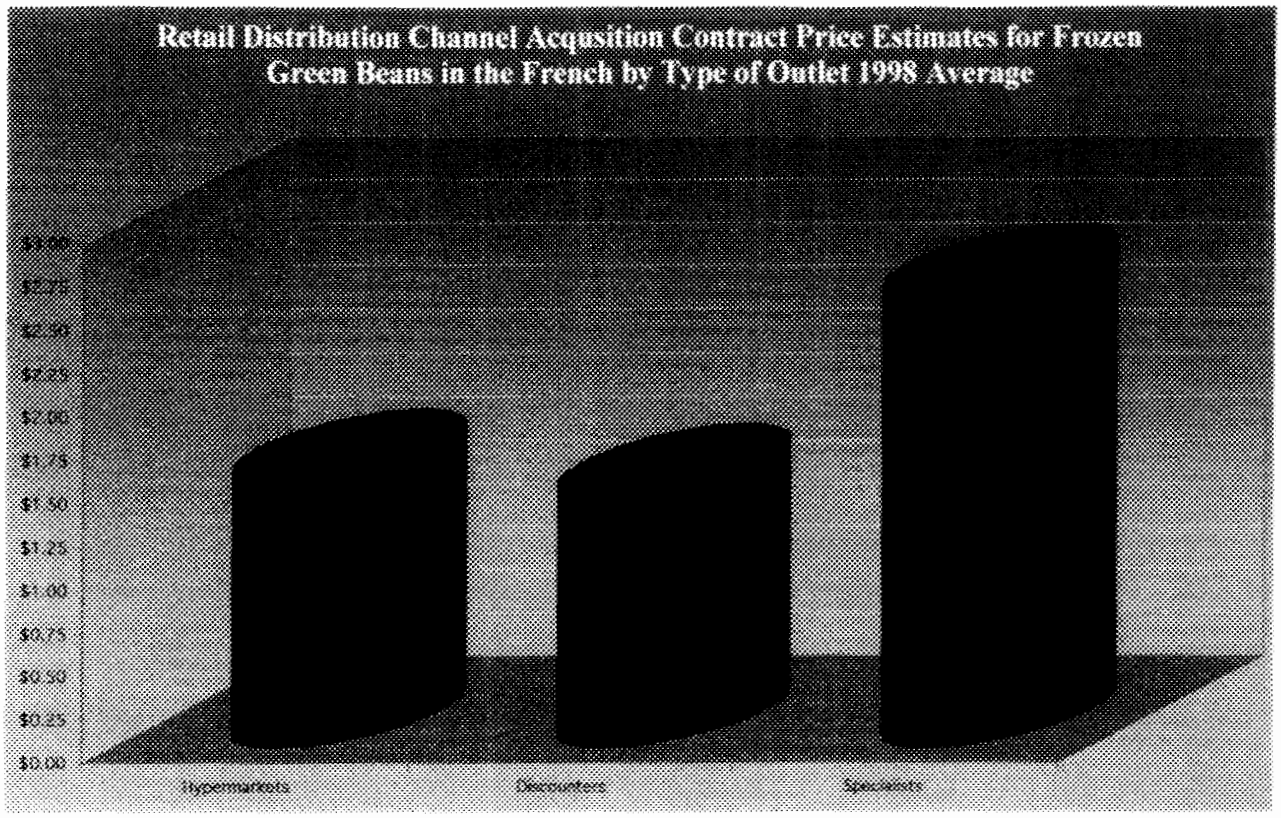
Spar
Anti
8 a Huit
Presto
USEGO/Primo/Vis a Vis

Brokers/Wholesalers

Spar/Handels
Rewe
Edeka

Major Processors

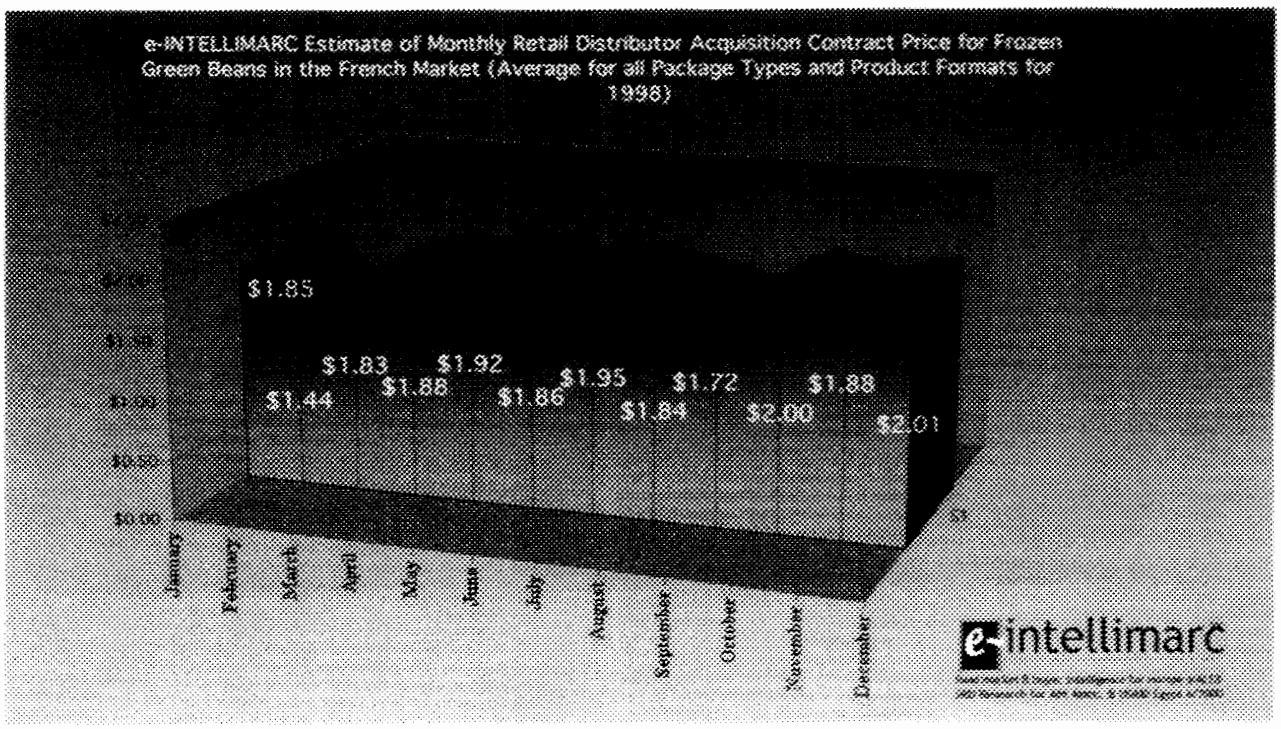
Bonduelle
Nestle- Findus
Payson Breton
Grand Metropolitan
Miko (Unilever)
Gel 2000



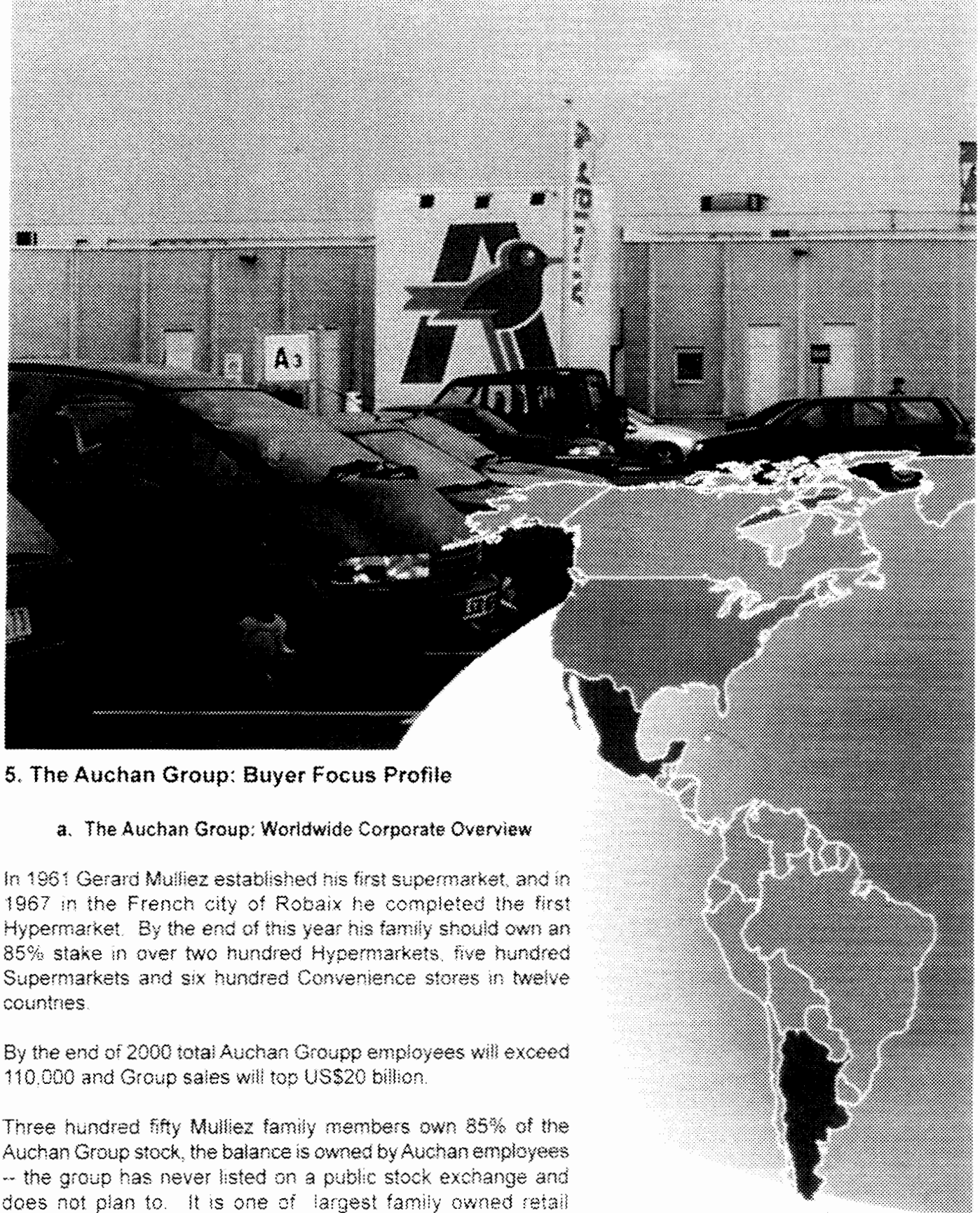
The graph above estimates the average price during the whole year of 1998 which the three profiled types of retail chains in France paid for an average kilo of frozen green beans.

This represents an average of all stores in the category, including all different product types (whole beans, cut beans, sliced beans and organic green beans), and all package sizes and types.

The chart below averages SRD/*e-intellimarc* estimates of all store types, all products and all packages by month to illustrate the seasonality of product acquisition prices. These seasonal fluctuations are based on the seasonal fluctuations in product costs in general, so seasonal patterns are assumed to be similar for different store types.



PART TWO: BUYER INTELLIGENCE FOCUS PROFILE: THE AUCHAN GROUP



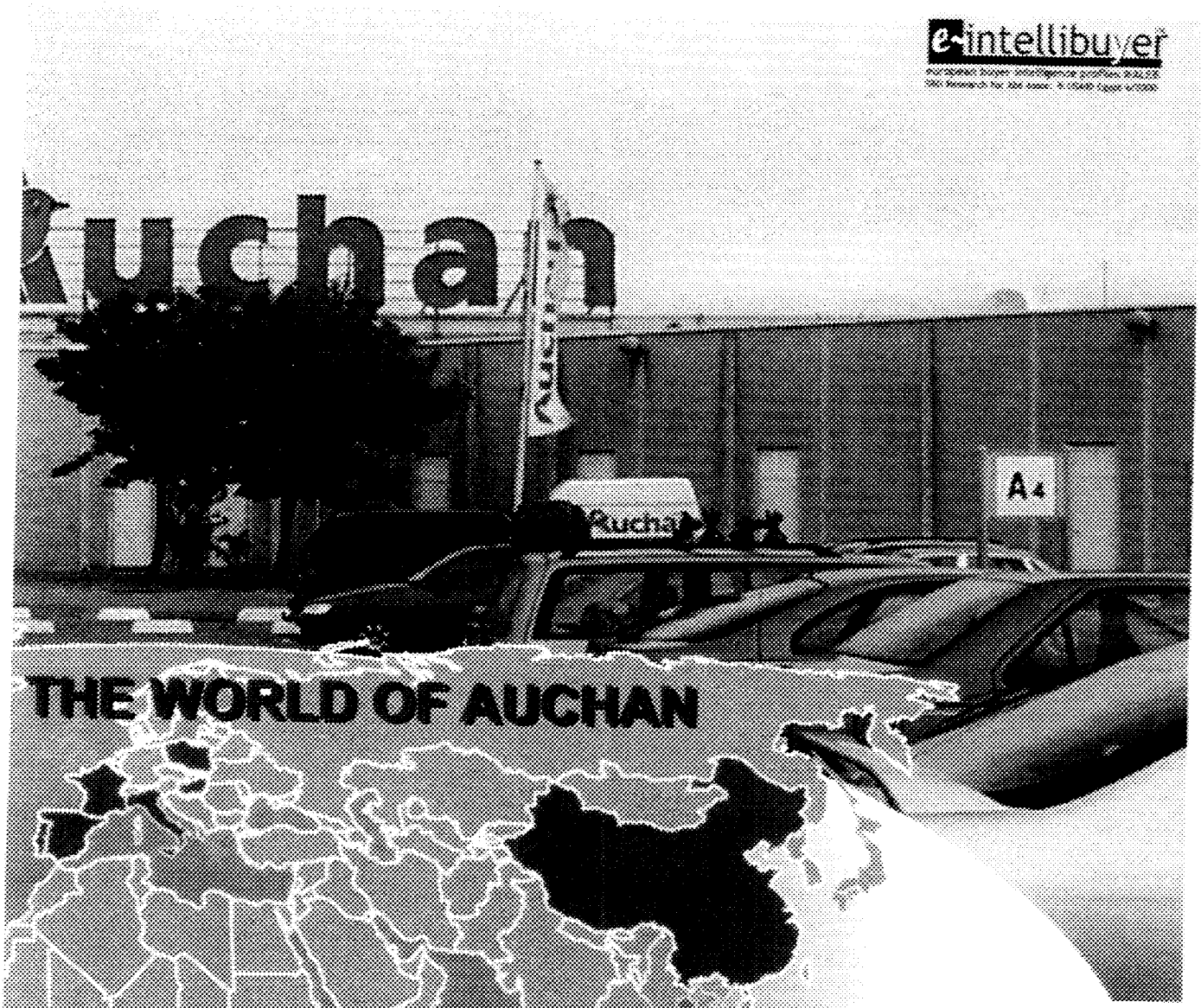
5. The Auchan Group: Buyer Focus Profile

a. The Auchan Group: Worldwide Corporate Overview

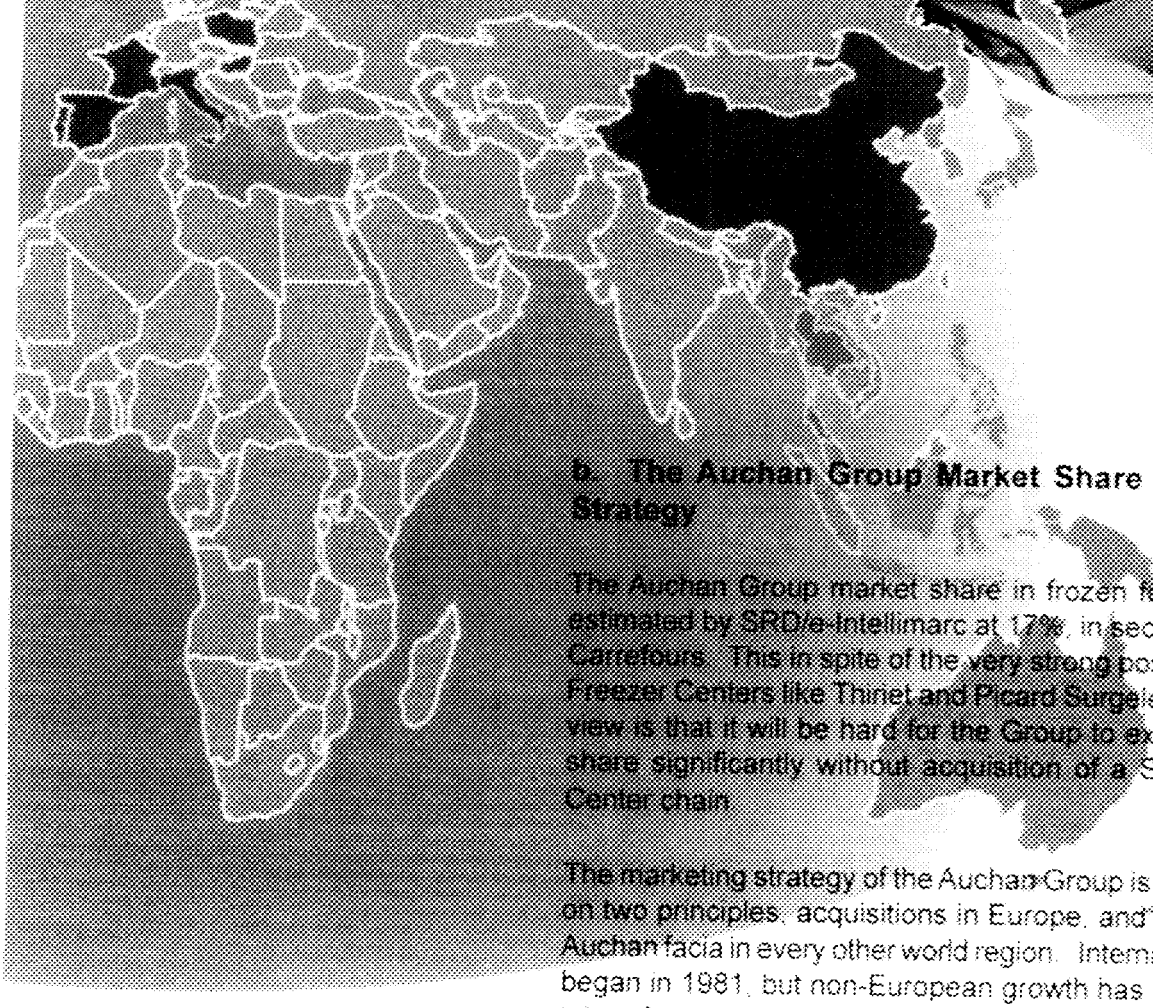
In 1961 Gerard Mulliez established his first supermarket, and in 1967 in the French city of Robaix he completed the first Hypermarket. By the end of this year his family should own an 85% stake in over two hundred Hypermarkets, five hundred Supermarkets and six hundred Convenience stores in twelve countries.

By the end of 2000 total Auchan Groupp employees will exceed 110,000 and Group sales will top US$20 billion.

Three hundred fifty Mulliez family members own 85% of the Auchan Group stock, the balance is owned by Auchan employees -- the group has never listed on a public stock exchange and does not plan to. It is one of largest family owned retail companies in the world. In addition to owning food stores, the Auchan Group is the owner of most of the shopping malls where their Hypermarkets are located.



THE WORLD OF AUCHAN



b. The Auchan Group Market Share and Marketing Strategy

The Auchan Group market share in frozen foods in France is estimated by SRD/e-Intellimarc at 17%, in second place behind Carrefours. This in spite of the very strong position of Specialty Freezer Centers like Thiriet and Picard Surgeles in France. Our view is that it will be hard for the Group to expand this market share significantly without acquisition of a Specialty Freezer Center chain.

The marketing strategy of the Auchan Group is strongly founded on two principles, acquisitions in Europe, and expansion of the Auchan facia in every other world region. International expansion began in 1981, but non-European growth has so far only made token footholds with single Auchan Hypermarkets in the U.S., Mexico, Thailand, Argentina, and one planned this year for China.

c. Auchan Strengths, Weaknesses and Strategic Opportunities

In our view, the Auchan Group's principal strength is its strong initial position in the vast markets of romance-language Europe, including France, Italy, Spain and Portugal. This is a high income, and high income growth region, and the Auchan Group is uniquely positioned to build a vast food marketing empire there.

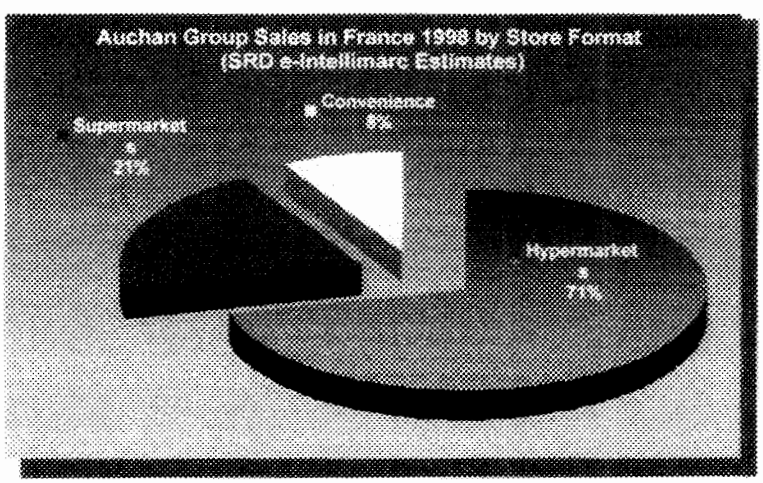
The U.K. supermarket masters have targeted their energies into Central Europe, and following their colonial ties Westward through acquisitions in the US/Canada and Eastward to Asia. The German language giants of Switzerland (Migros) and Germany (costcutters Aldi, Lidl etc.) have positioned themselves appropriately in Central and Eastern Europe and are moving south into Turkey and beyond.

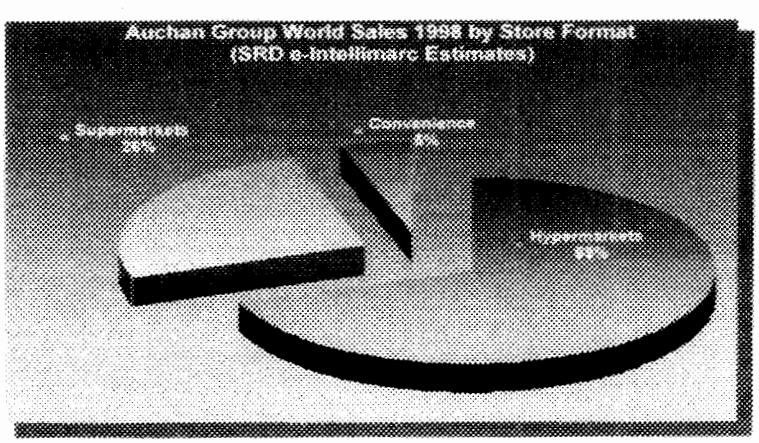
Number of Auchan Group Stores by Format and Country

	Hypermarkets	Supermarkets	Convenience	Total
France	120	229	591	940
Italy	31	157		188
Spain	35	90		125
Portugal	11			11
Central Europe	2	8		10
Luxembourg	1			1
Latin America	1			1
Southeast Asia	1			1
United States	1			1
Total	203	484	591	1278

Auchan Group Sales in 1998 by Country & Store Format (US$1000 e-Intellimarc Estimates)

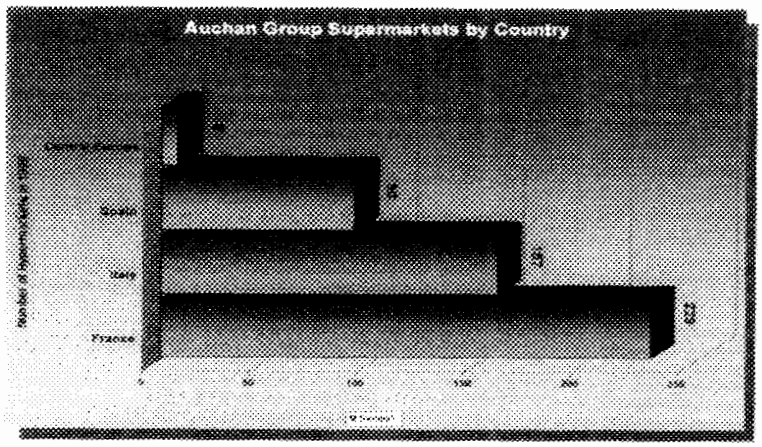
	Hypermarkets	Supermarkets	Convenience	Total
France	$8,407,312	$2,468,300	$955,923	$11,831,535
Italy	$2,171,889	$1,692,241		$3,864,130
Spain	$2,452,133	$970,074		$3,422,207
Portugal	$770,670			$770,670
Central Europe	$140,122	$86,229		$226,351
Luxembourg	$65,108			$65,108
Latin America	$70,984			$70,984
Southeast Asia	$66,153			$66,153
United States	$70,061			$70,061
Total	$14,214,431	$5,216,845	$955,923	$20,386,799

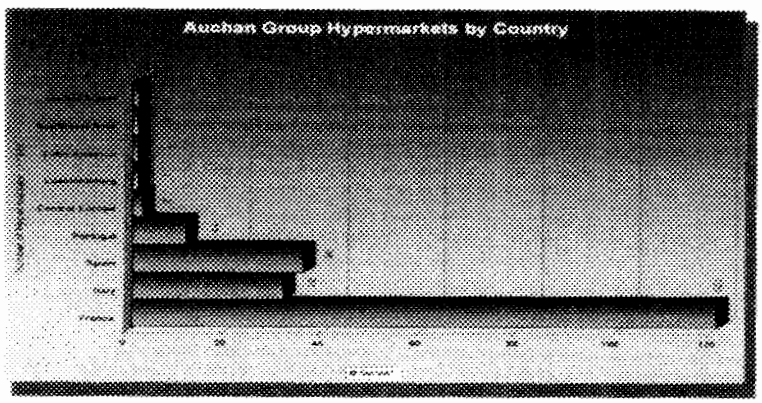




It may seem outdated, but our view is that language, geographic position and colonial ties do matter in the world race to dominate supermarketing. As Auchan's principal strength is in expanding inside the South and West of Romance-language Europe, so its principal weakness is its scattered and thin international expansions in every other continent.

Our view is that Auchan's major strategic opportunities are (1) to use its very strong supply lines and employee training models to expand market share in France, Italy, Spain and Portugal, and (2) concentrate its non-European expansion efforts on its Mexican and Argentine beacheads. These two countries are excellent Auchan expansion targets, and fit our view of Auchan's comparative advantage vis-a-vis its US and European competitors.





Auchan heartland covering 64% of total group sales area. If the 476 supermarkets in France, Italy and Spain are added to the Hypermarkets, these two formats in three adjacent countries with a common supply chain linked by EU motorways, comprise roughly 90% of all group sales area with only about 50% of group stores.

Since scale and logistics are everything in this business, Auchan's large format stores in its three country heartland are really even more than 90% of its life.

d. Auchan Store Formats, and Sales Area

Worldwide, the Auchan Group owns 1,278 stores which Auchan reports divide between Hypermarkets, Supermarkets and Convenience. SRD-eIntellimarc estimates that Auchan's 203 Hypermarkets, although they only comprise only 16% of group stores, contain 70% (1.6M m²) of the total sales area (2.4M m²) of all formats.

Inside France, the Auchan Group has 120 Hypermarkets under the Auchan and Mammouth facias with almost one million square meters of sales area, this represents 41% of total group sales area and is the core asset of the Auchan empire.

Surrounding this core are the sixty six Hypermarkets in Italy and Spain, which when added to the French Hypermarkets comprise a Hypermarket

Auchan Group Square Meters of Sales Area by Store Format and Country 1997 (SRD e-intellimarc Estimates)

Sq. Mt.	Hypermarkets	Supermarkets	Convenience	Total
France	972,862	285,622	110,569	1,369,053
Italy	251,323	195,820		447,142
Spain	283,751	112,233		396,005
Portugal	89,179			89,179
Central Europe	16,214	9,978		26,192
Luxembourg	7,534			7,534
Latin America	8,214			8,214
Southeast Asia	7,653			7,653
United States	8,107	-	-	8,107
Total	1,644,839	603,673	110,569	2,359,081

Auchan Group Market Share in Group Sales in 1998 by Country & Store Format (US$1000 e-intellimarc Estimates)

	Hypermarkets	Supermarkets	Convenience	Total
France	59.1%	47.3%	100.0%	58.0%
Italy	15.3%	32.4%		19.0%
Spain	17.3%	18.6%		16.8%
Portugal	5.4%			3.8%
Central Europe	1.0%	1.7%		1.1%
Luxembourg	0.5%			0.3%
Latin America	0.5%			0.3%
Southeast Asia	0.5%			0.3%
United States	0.5%			0.3%
Total	100.0%	100.0%	100.0%	100.0%

Auchan Strategic Alliance Core Supply Opportunity Triangle

	Hypermarkets	Supermarkets	Convenience
France	Auchan Mammouth	ATAC	Eco Service
Italy	Auchan Citta Mercado	SNA	
Spain	Alcampo	Sobeco	
Portugal	Jumbo Pao de Acucar		
Central Europe	Auchan		
Luxembourg	Auchan		
Latin America	Auchan		
Southeast Asia	Auchan		
United States	Auchan		

e. Negotiation Notes and Models for Developing Auchan Strategic Alliances

Behind the fantasy of a worldwide Augchan lies a powerful reality of a Western Mediterreanean marketing giant. It is in the context of this Mediterranean reality Egyptian strategic alliances for suppy of frozen green beans should be developed. Strategic alliance negotiation is largely a matter of finding a strategic fit between companies. Strategic fit is in turn largely an issue of niche advantages. In the supermarket business two major factors, cost and logistics, define strategic fit.

As European supermarkets look South and East to obtain low labor cost supplies of frozen vegetables, including green beans, Egypt and Auchan have a number of important potential strategic "fits". The most important is the intersection between the Auchan Mediterrean "core" triangle (see chart above) and the Eypt supply logistics triangle between major Auchan import supply ports, Livorgno, Marseilie, and Barcelona and Alexandria. This regional supply "fit" with Auchan, is perhaps better than any other European supermarket giant. The combination of low labor cost product and transport logistic agility, define a high potential strategic alliance niche between Egypt and Auchan. The close language and cultural ties between France and both Morocco and Algeria (potential low labor cost suppliers) present competitive challenges to the development of such alliances. We would recommend a "flank" action with approaches to Citta Mercado and Alcampo with supply links through Livorgno and Barcelona. This would avoid an immediate clash with Bonduelle in their own home court. The objective would be to negotiate an *Auchan*™ brand supply of extra fine beans for the Italian and Spanish stores.

f. Auchan Frozen Green Bean Product Line Pricing and Brand Strategy

The most important characteristic of the Auchan frozen green bean product line is its limited scope. For a major hypermarket with as many as 60,000 different items in stock, to have only two frozen green bean products is most unusual.

i. Auchan Frozen Green Bean Product Line.

The total Auchan frozen green bean product line is comprised of one product type, whole extra fine green beans and one package format, 1kg. plastic bag. This contrasts to Carrefour's four product line, and the four product line of the specialty freezer center, Thiriet. The lack of vertical cut beans and horizontal sliced formats is characteristic of the French market and contrasts with the mutliple sliced formats available in the U.K.

ii. Auchan Frozen Green Bean Brand Strategy

The dominating presence of Bonduelle in the frozen vegetable market in France is evident in the Auchan product line. Half of Auchan's offering is under its own Auchan™ brand and half in Bonduelle's well known package. The best opportunity for Egypt would be to gain a foothold packing in the Auchan label for distribution though its Citta Mercado, and or Alcampo facias in Italy and Spain. This could lead to a broader distribution opportunity in the Mammouth, and later Auchan stores in France

iii. Auchan Frozen Green Bean Pricing

The *Auchan®* brand one kilo package is sold at $2.22 and the Bonduelle® brand kilo is sold at $2.90. This pricing is slightly above the competitor Carrefour's own label for extra fine at $2.15 and substantially more for the Bonduelle® package at the same price, $2.15. The pricing of Bonduelle is almost 35% above Carrefour's pricing of the same package.

Auchan prices are predictably higher than the discounter supermarkets like Lidl and Aldi which sell "very fine" frozen green beans at $1.90 per kilo. Specialty freezer shops like Thiriet and Picard Surgeles have a wider price and quality range of frozen beans, with imported Moroccan product lower at $2.06/kg., and gourmet Bonne Cuisine® brand at $4.75/kg. Thus, Auchan, and for that matter, also Carrefours, target their mid quality hypermarket product in the center of the price range between the discounters and the high end brands sold through specialty freezer shops.

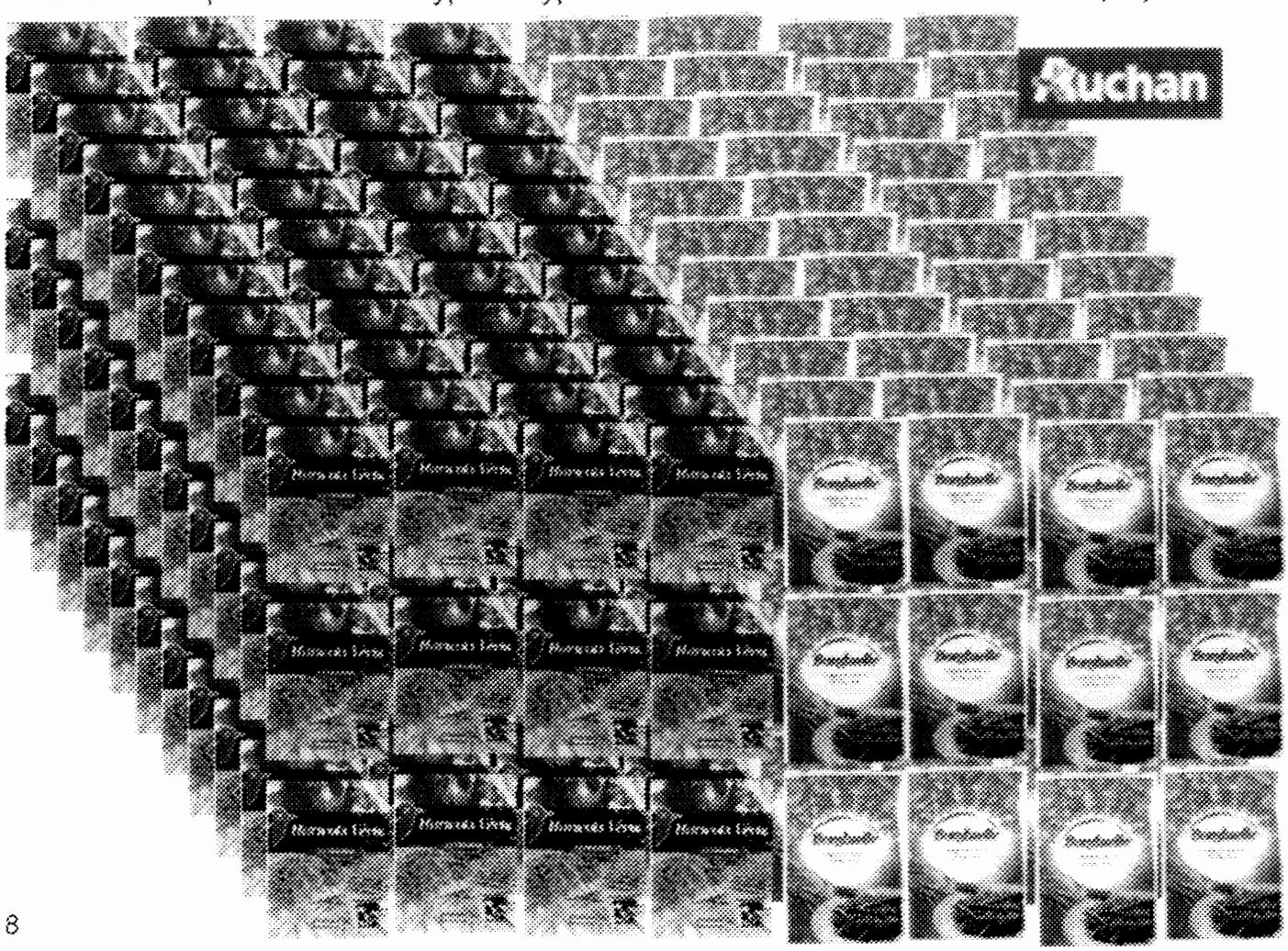
g. Auchan Grozen Green Bean Shelf Space Allocation and Product Movement Analysis

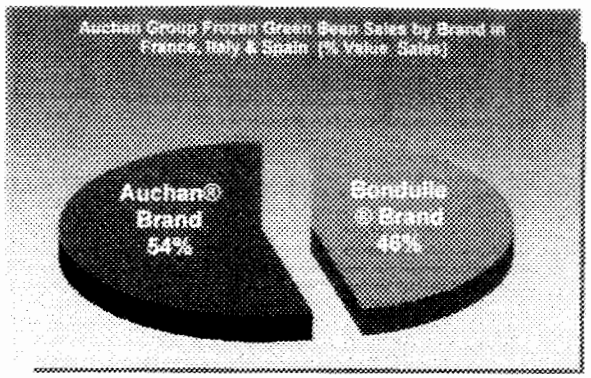
Frozen green beans are allocated a total of 1.99 square meters of sales floor space in an average Auchan hypermarket, with almost equal space devoted to the Bonduelle® and Auchan® brand packages. The typical shelf display is an open top cooling chest style case as illustrated below.

SRD/e-Intlimarc estimates that an average of 12 Bonduelle® and 18 Auchan® brand packages are sold on an average day in a typical hypermarket. This would total 9.3 metric tons of frozen green bean sales per hypermarket per year. When expanded to the total Auchan Group stores in France, this implies a total frozen green bean sales per year of 1,606 metric tons, and 2,489 metric tons in Italy and Spain are added.

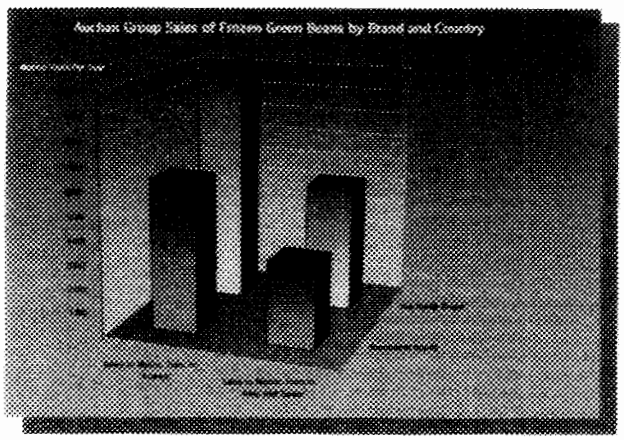
In sales value, this implies a total of US$ 6m in France, Italy and Spain, $2.8m in the Bonduelle® label and $3.4m in the Auchan® brand.

Auchan Group Frozen Bean Typical Hypermarket Frozen Green Bean Shelf Display





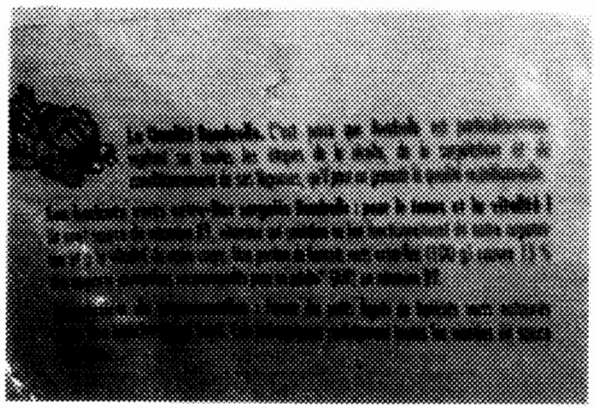
Based on these sales figures, and assuming SRD's estimated sales margins, the Auchan Group negotiates frozen green bean acquisition contracts for supplies under its own Auchan® label totalling approximately US$2.1m per year, and an aquisition contract with Bonduelle® for approximately $1.8m per year for distribution in its core stores in France, Italy and Spain.

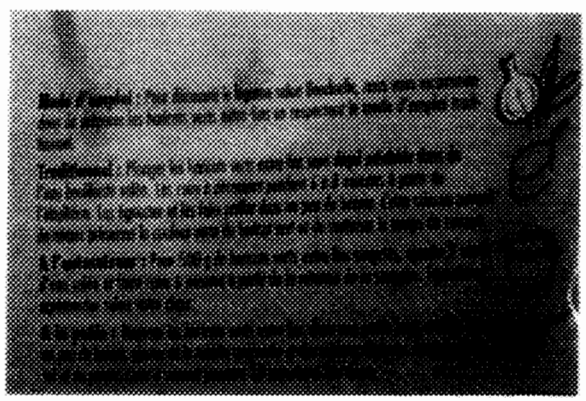


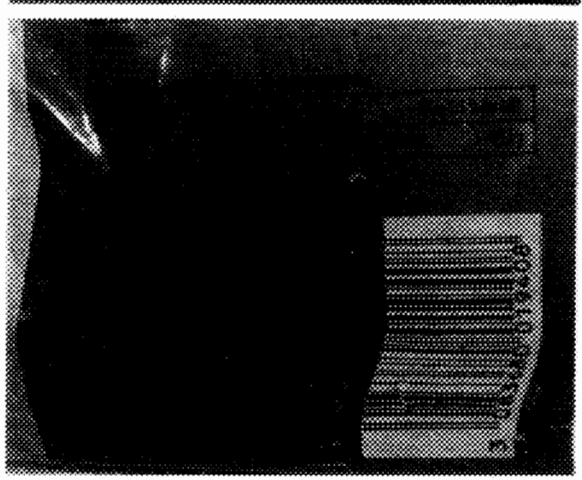
Auchan Group Shelf Space Allocation, Sales and Product Movement Estimates for Frozen Green Beans by Brand and Package Type

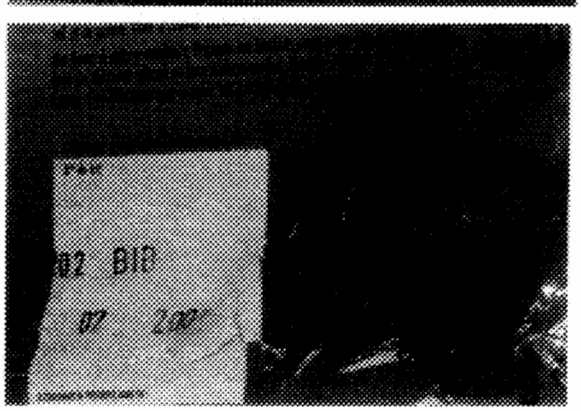
	Extra Fine Green Beans	Extra Fine Green Beans	Total or Average All Package Types
Brand	*Bonduelle®*	*Auchan®*	
Package Type	Plastic	Plastic	
Height cm	31.00	32.00	31.50
Width cm	25.50	27.00	26.25
Depth cm	4.00	4.00	4.00
SHELF SPACE	417,384	456,192	
Price Local Currency	18.20	13.90	16.05
Price in USD	$2.90	$2.22	2.56
USD/Kilo Include Package	$2.90	$2.22	2.56
USD/Kilo (Net Product)	$2.90	$2.22	2.56
Gross Weight (Including Package)	1,000	1,000	1,000
Net Weight (Product Only)	1,000	1,000	1,000
Est. Aug 99 Retailer's Contract Prices			
US$/Package	1.83	1.40	1.61
US$/Kg. Net Product	1.83	1.40	1.61
Shelf Space in Square Meters/Store	0.95	1.04	1.99
Estimated Packages Sold/Store/Day	11.84	18.25	30.10
Estimated Sales in MT Per Year/Store	3.67	5.66	9.33
Estimated Sales in US$ 000/Store/Year	10.66	12.54	23.20
Estimated Sales in MT/Yr All Auchan France	632	974	1,606
Estimated Sales in US$ 000/Yr Auchan France	1,834	2,159	3,993
Estimated Sales US$ 000 in France/Italy/Spain	2,843	3,346	6,189
Estimated Sales MT/Yr in France/Italy/Spain	979	1,509	2,489
Estimated Acquisition Contracts (US$ 000)	1,791	2,108	3,899

h. Auchan Frozen Green Bean Packaging

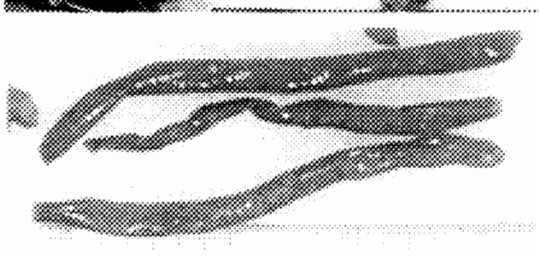




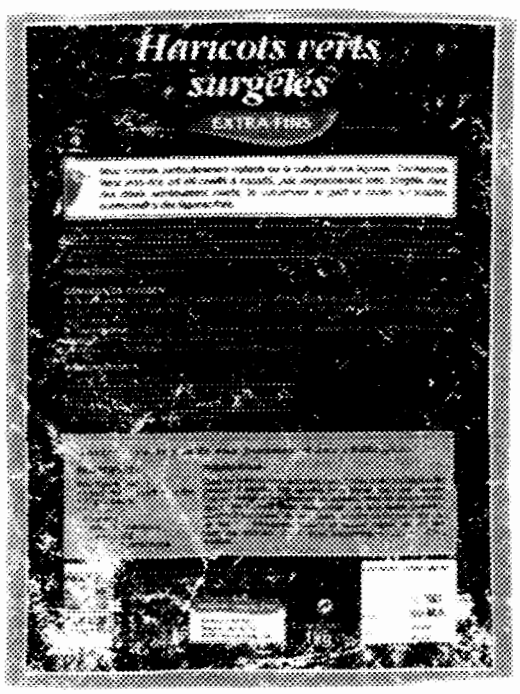




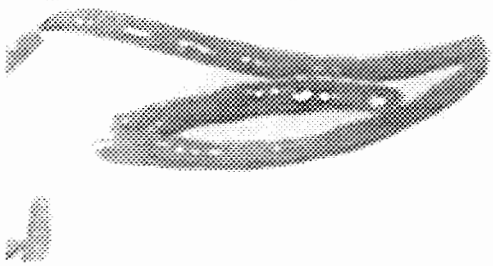
h. Auchan Detailed Packaging and Product Specifications



h. Auchan Frozen Green Bean Packaging



h. Auchan Detailed Packaging and Product Specifications

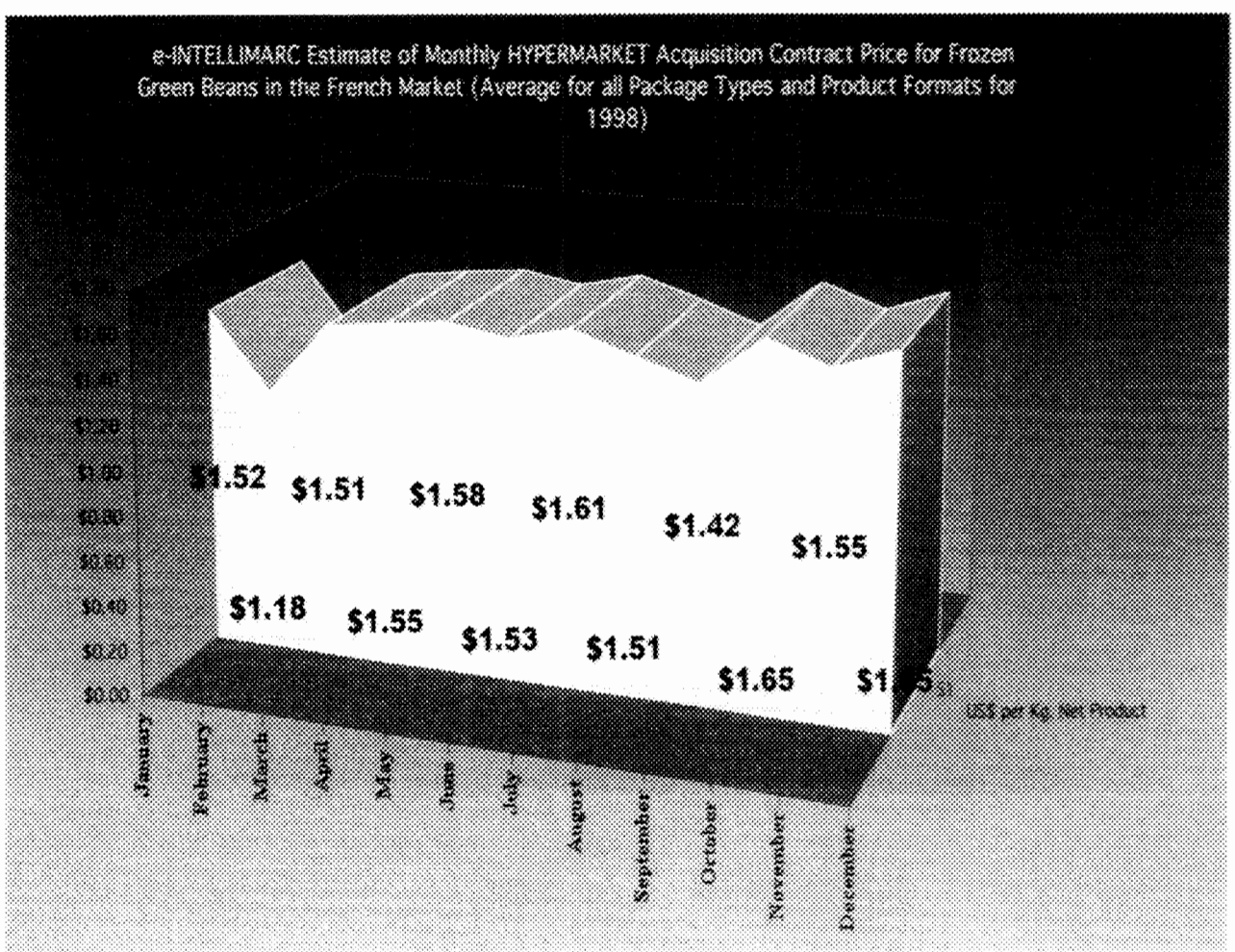


PART THREE: BUYER INTELLIGENCE BRIEFS: CARREFOUR, THIRIET & LIDL

6. Carrefour: Hypermarket & large Format Supermarket Buyer Brief

a. Estimated Buyer Acquisition Contract Prices for All Hypermarkets/Supermarkets

The graph below presents the SRD/*e-intel-limarc* estimates of the acquisition contract price paid on average by all hypermarket chains for all product types and package sizes. Since a particular chain is not likely to be negotiating a new acquisition contract each month, these estimates do not measure a specific transaction. They are intended only as general guidelines based on estimated margins and seasonal fluctuations in import product costs.



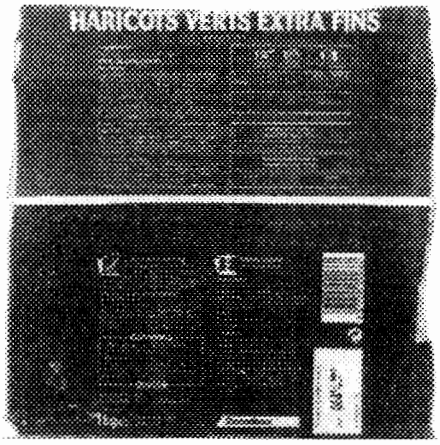
b. Carrefour Estimated Buyer Acquisition Contract Prices and Shelf Space Allocation

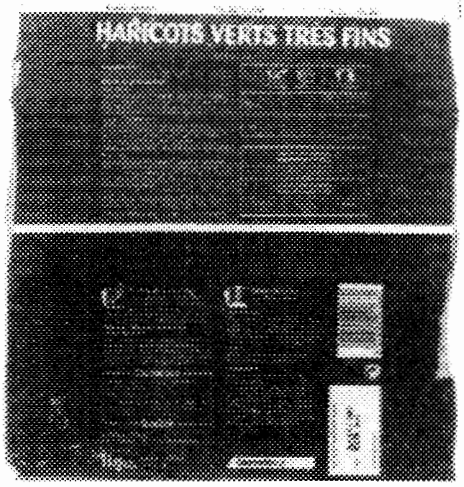
The estimates on this page provide more precise estimates of acquisition costs for specific chains, different types of products, different packaging types and sizes. The acquisition price estimates by package size and type can give potential exporters a more refined idea of the quality and price relationships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

Carrefour

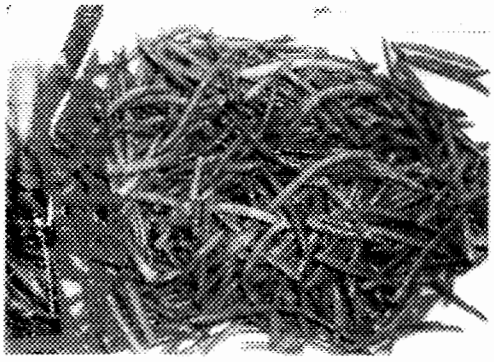
Product Type	Extra Fine Green Beans	Very Fine	Green Beans w/Bacon pieces	Extra fine Green Beans
Brand	Carrefour	Carrefour	Bonduelle	Bonnduelle
Package Type	Plastic	Plastic	Plastic	Plastic
Height cm	32.50	32.50	27.00	31.00
Width cm	30.00	30.00	23.50	25.50
Depth cm	4.00	4.00	4.00	4.00
SHELF SPACE (Cubic Centimeters)	514,800	514,800	335,016	417,384
Price Local Currency	13.50	10.90	15.65	13.50
Price in USD	$2.15	$1.74	$2.50	$2.15
USD/Kilo include Package	$2.15	$1.74	$3.33	$2.15
USD/Kilo (Net Product)	$2.15	$1.74	$3.33	$2.15
Gross Weight (Including Package) Grams	1,000	1,000	750	1,000
Net Weight (Product Only) Grams	1,000	1,000	750	1,000
Est. Aug 99 Retailer's Contract Prices				
US$/Package	$1.36	$1.10	$1.57	$1.36
US$/Kg. Net Product	$1.36	$1.10	$2.10	$1.36

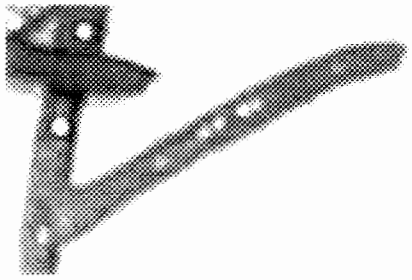
c. Carrefour Packaging





d. Carrefour Product Specifications by Package Type





Ingrédients :

Haricots verts extra fins de Bretagne

Mode de préparation :

Pour 500 g :

Cuisson à la casserole : mode de cuisson recommandé

Dans trois quarts de litre d'eau bouillante salée, jeter 500g de haricots surgelés. Remettre à ébullition et cuire à découvert 10 à 12 minutes. Égoutter.

Cuisson à l'autocuiseur :

Verser 500g de haricots surgelés dans le panier, poser haute, refermer et laisser cuire à feu moyen 4 minutes dès sifflement de la soupape.

Cuisson au micro-ondes : mode de cuisson déconseillé

Pour 1 kg :

Cuisson à la casserole : mode de cuisson recommandé

Dans un litre et demi d'eau bouillante salée, jeter 1 kg de haricots surgelés. Remettre à ébullition et cuire à découvert 10 à 12 minutes. Égoutter.

Cuisson à l'autocuiseur :

Mettre quatre litres dans dans l'autocuiseur, verser 1 kg de haricots surgelés dans le panier et poser haute, refermer et laisser cuire à feu moyen 4 minutes dès sifflement de la soupape.

Cuisson au micro-ondes : mode de cuisson déconseillé

Conseils de conservation :

Carrefour

« Pas nécessaire de congeler à nouveau ».

« Ecoute son température ».

Pour toute réclamation, notez le numéro de lot indiqué sur l'emballage et adressez-vous au service Produits Carrefour.

Qualité

CARREFOUR FRANCE
ZAE St Guénault - BP 75 - 91002 Evry cedex

Poids net :

1kg

Fabriqué en France

Salade Niçoise

pour 8 personnes

Ingrédients :

[illegible]

Préparation :

[illegible]

Carrefour

	Casserole	Autocuiseur	Micro-ondes
500 g	10 à 12 mn	4 mn	2,50 W / 2,50 W déconseillé
1kg	10 à 12 mn	4 mn	déconseillé

Valeurs énergétiques moyennes pour 100 g :

[illegible] kJ / [illegible] kcal

Valeurs nutritionnelles moyennes pour 100 g :

Protéines	Glucides	Lipides
2,0 g	[illegible] g	[illegible] g

Conseils de conservation :

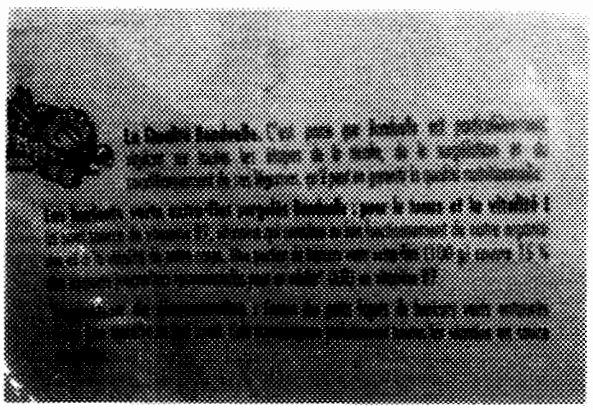
« 24 heures dans le réfrigérateur ».

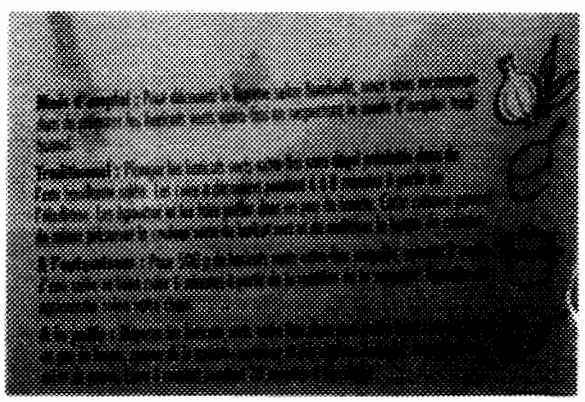
« 2 jours dans le compartiment à glace du réfrigérateur ».

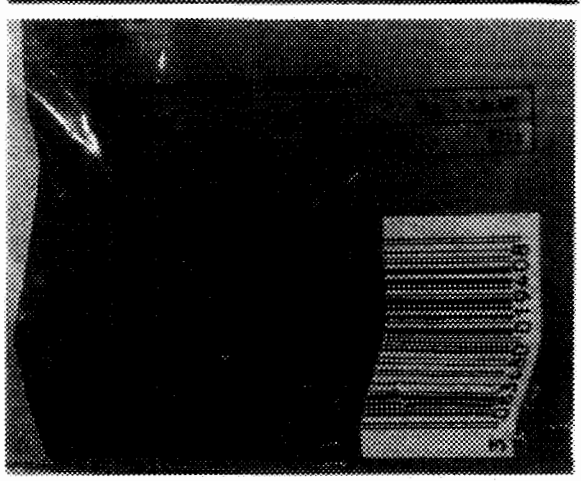
« Placer [illegible] dans le compartiment 10°C et 12 jours [illegible] ».

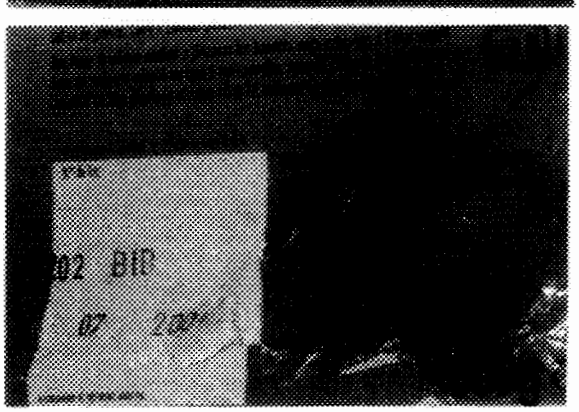
[illegible]

c. Carrefour Packaging

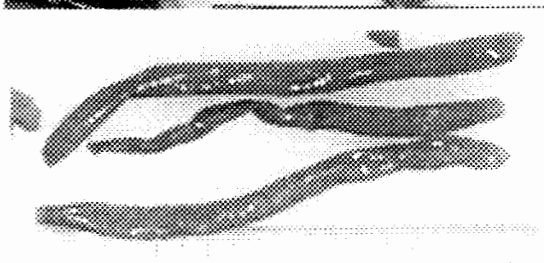




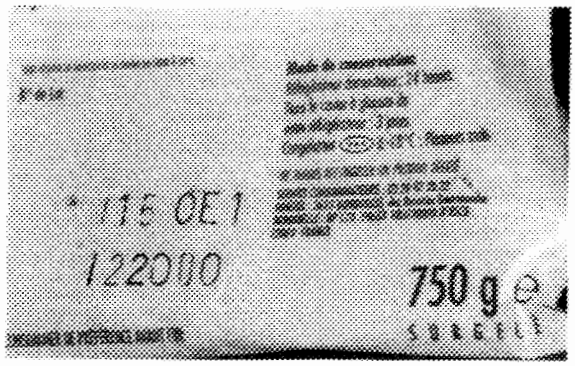


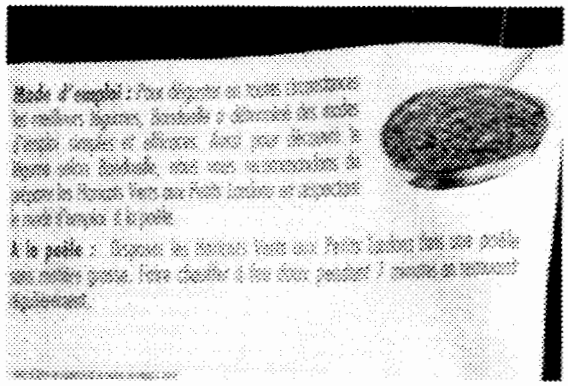


d. Carrefour Product Specifications by Package Type

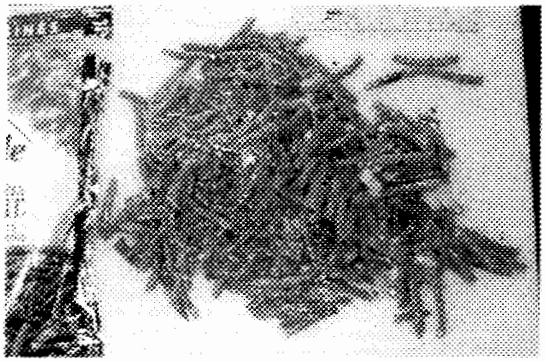


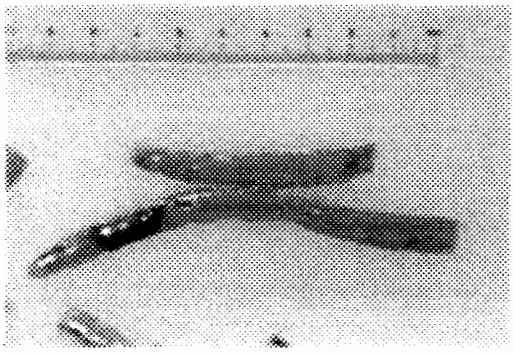
c. Carrefour Packaging

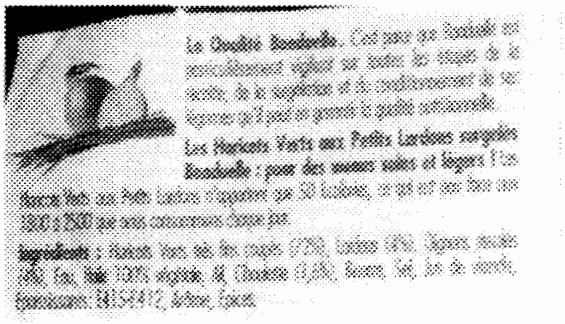




d. Carrefour Product Specifications by Package Type



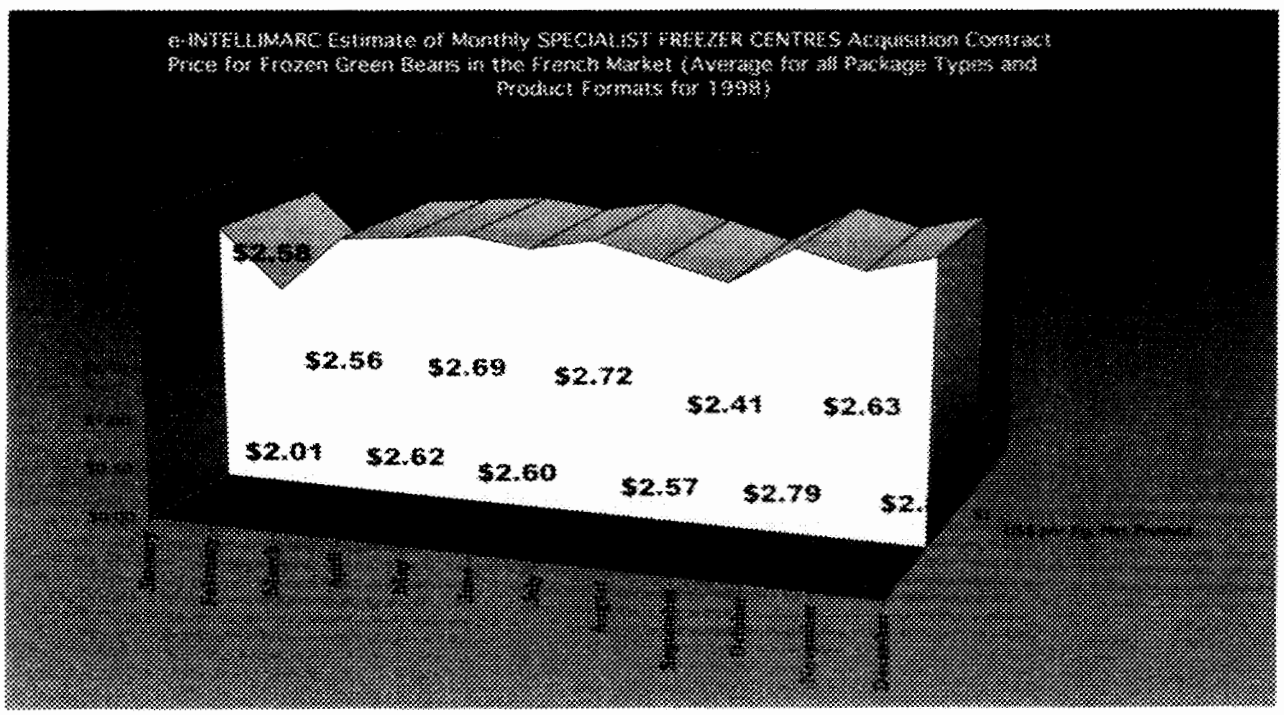




7.Thiriet: Specialist Freezer Centers Buyer Brief

a. Estimated Buyer Acquisition Contract Prices for All Specialist Freezer Centers

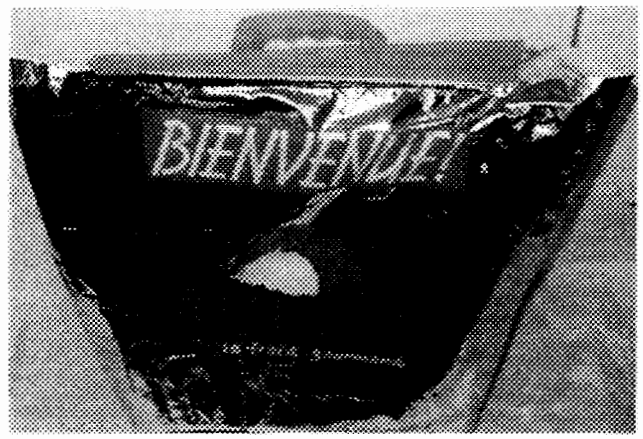
The graph below presents the SRD/*e-intellimarc* estimates of the acquisition contract price paid on average by all specialist freezer centers for all product types and package sizes. Since a particular chain is not likely to be negotiating a new acquisition contract each month, these estimates do not measure a specific transaction. They are intended only as general guidelines based on estimated margins and seasonal fluctuations in import product costs



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

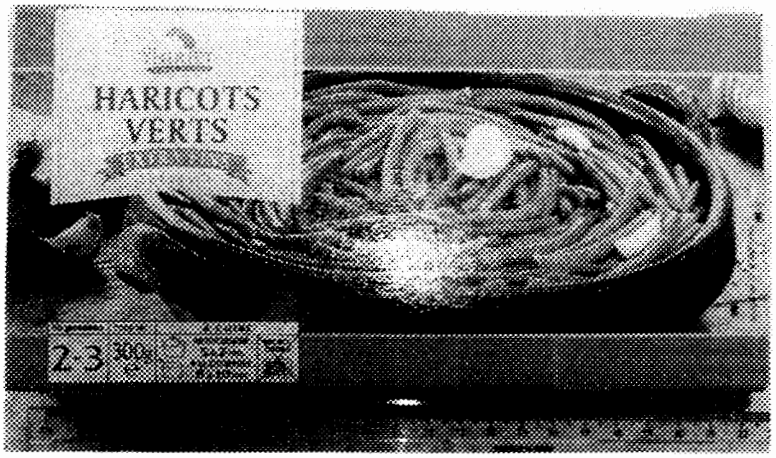
The estimates on this page provide more precise estimates of acquisition costs for specific chains, different types of products, different packaging types and sizes. The acquisition price estimates by package size and type can give potential exporters a more refined idea of the quality and price relationships in the French market place and assist in developing concrete feasibility studies and export business plans. Retail chains do not release their actual ac-

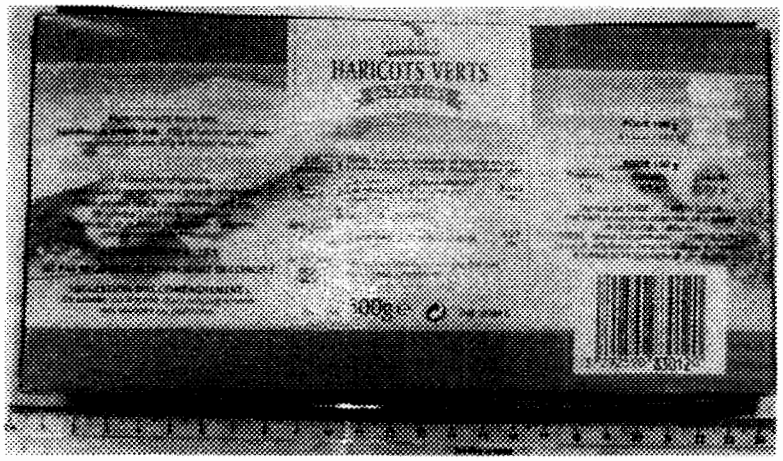
quisition contract pricing for public information. These estimates are based on SRD's best secondary information on retail to acquisition margins, applied to direct measurements of actual retail sales prices. They should be used only as preliminary indicators, and must be confirmed through actual market tests and direct negotiations with buyers

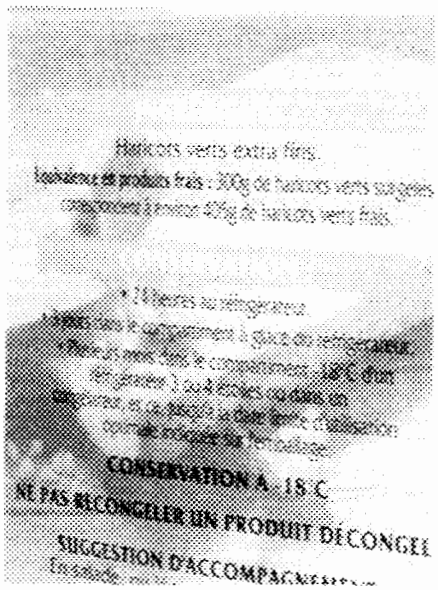


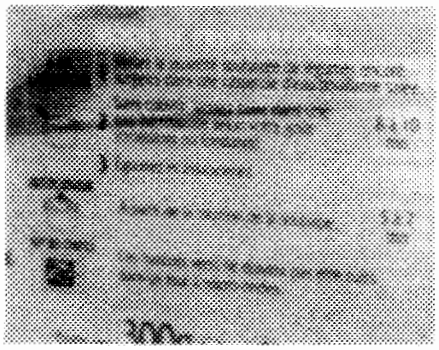
Product Type	Extra Fine Green Beans	Very Fine	Green Beans w/Bacon pieces	Extra fine Green Beans
Brand	Carrefour	Carrefour	Bonduelle	Bonnduelle
Package Type	Plastic	Plastic	Plastic	Plastic
Height cm	32.50	32.50	27.00	31.00
Width cm	30.00	30.00	23.50	25.50
Depth cm	4.00	4.00	4.00	4.00
SHELF SPACE (Cubic Centimeters)	514,800	514,800	335,016	417,384
Price Local Currency	13.50	10.90	15.65	13.50
Price in USD	$2.15	$1.74	$2.50	$2.15
USD/Kilo Include Package	$2.15	$1.74	$3.33	$2.15
USD/Kilo (Net Product)	$2.15	$1.74	$3.33	$2.15
Gross Weight (Including Package) Grams	1,000	1,000	750	1,000
Net Weight (Product Only) Grams	1,000	1,000	750	1,000
Est. Aug 99 Retailer's Contract Prices				
US$/Package	$1.36	$1.10	$1.57	$1.36
US$/Kg Net Product	$1.36	$1.10	$2.10	$1.36

c. Thiriet Packaging

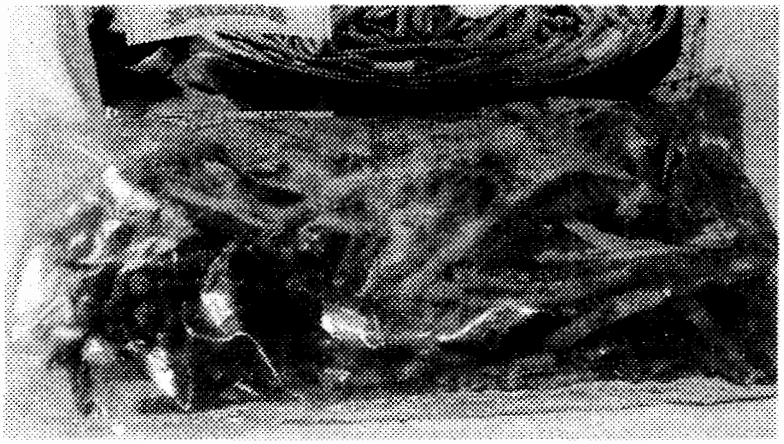


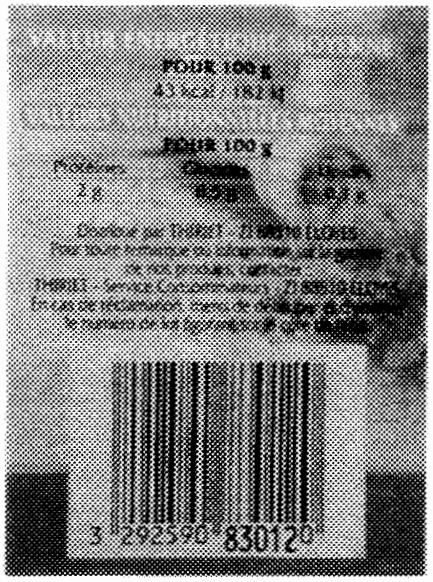


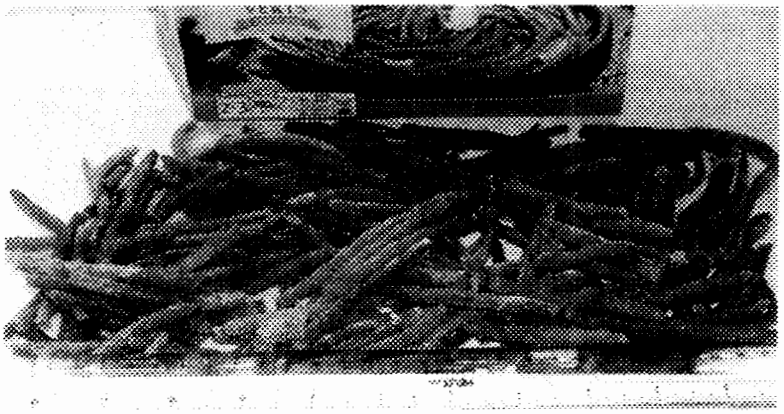




d. Thiriet Product Specifications by Product Type







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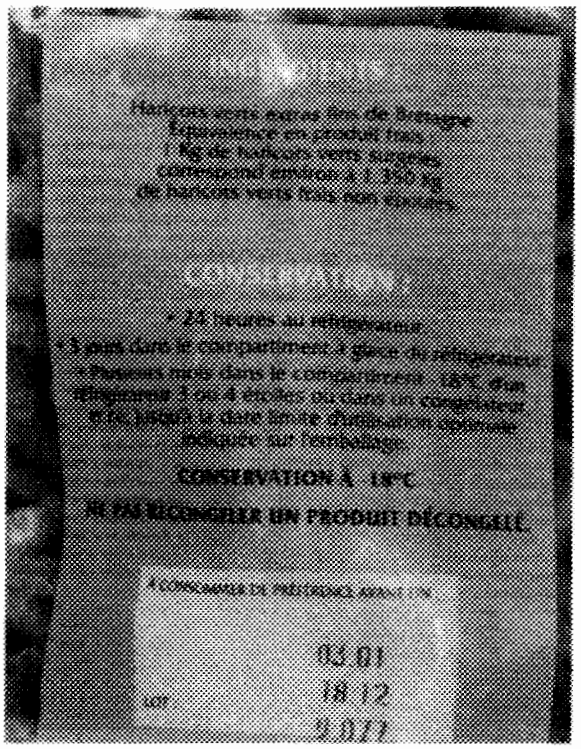
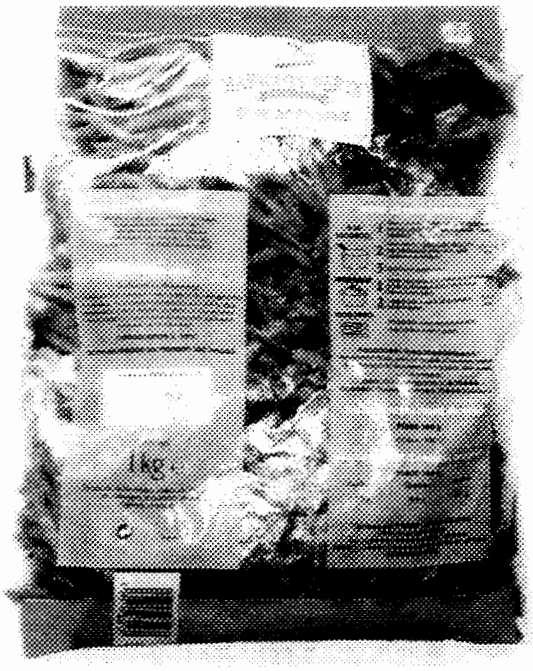
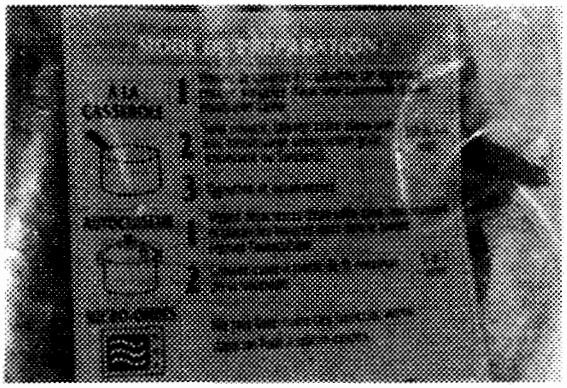
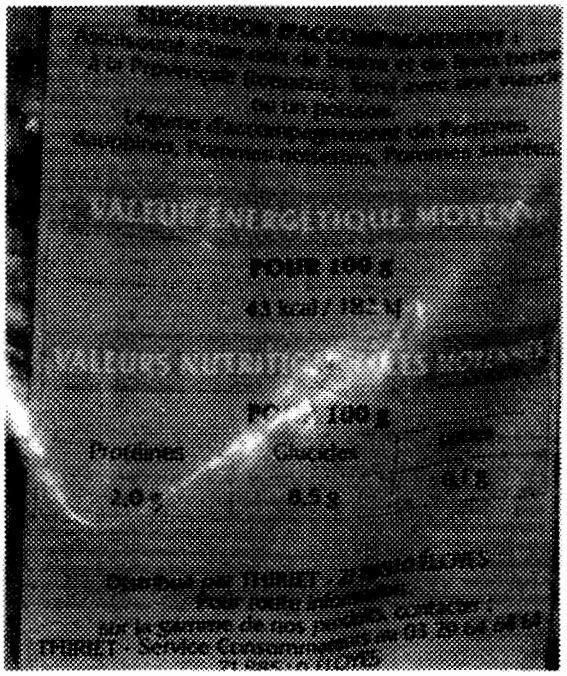
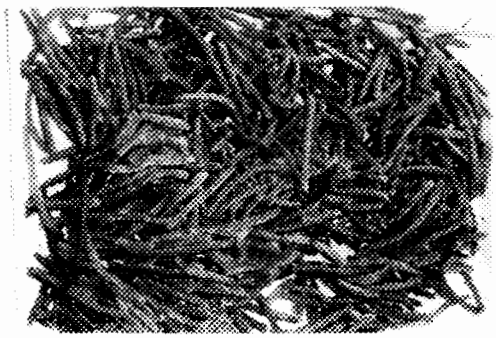




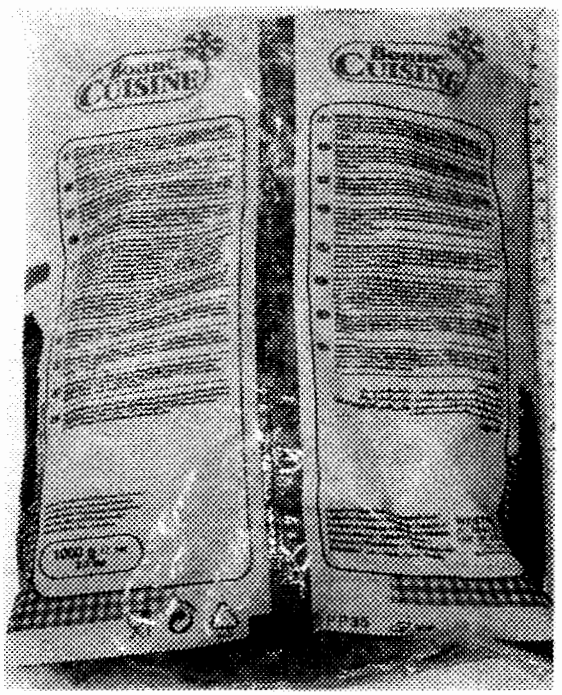


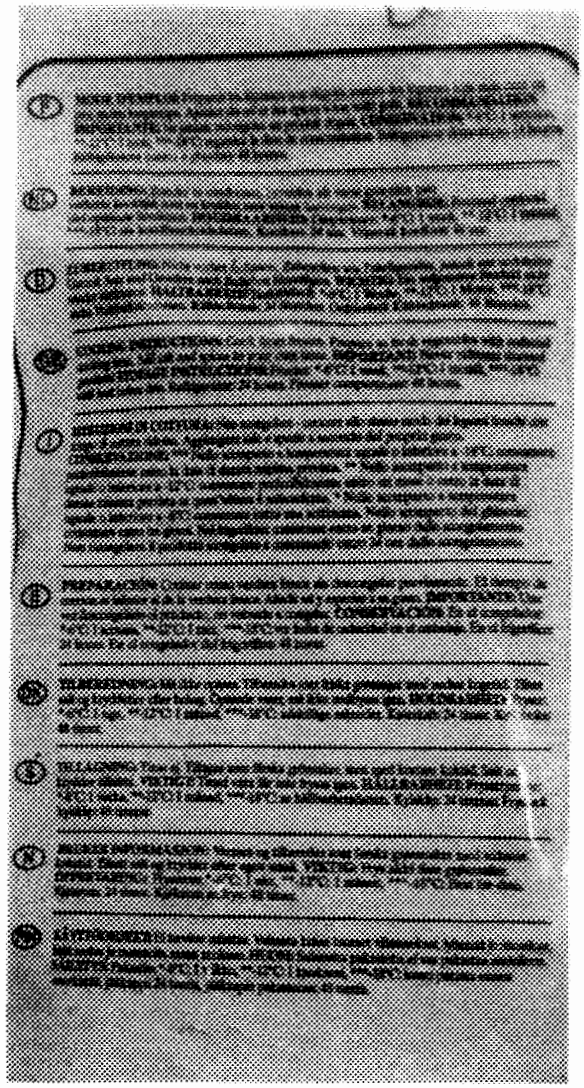


d. Thiriet Product Specifications by Product Type



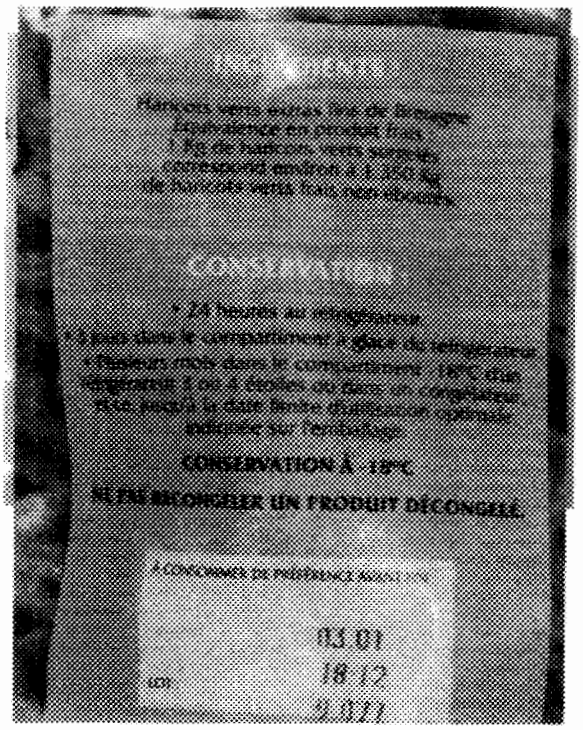
c. Thiriet Packaging

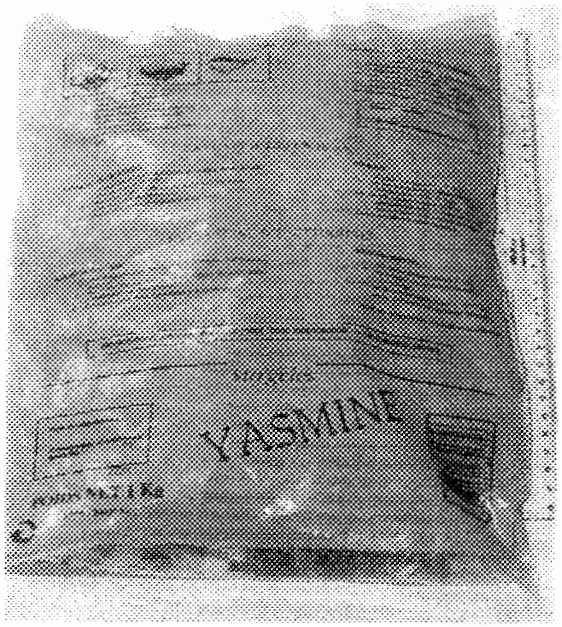


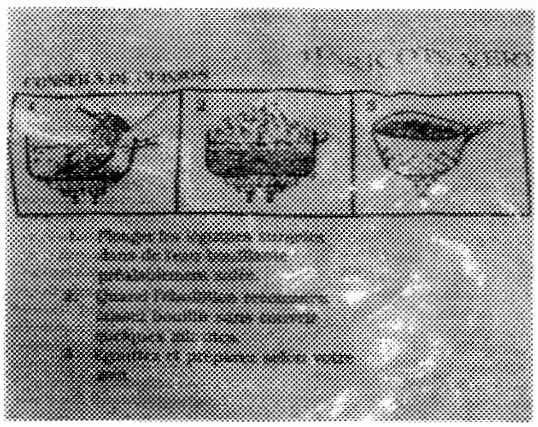


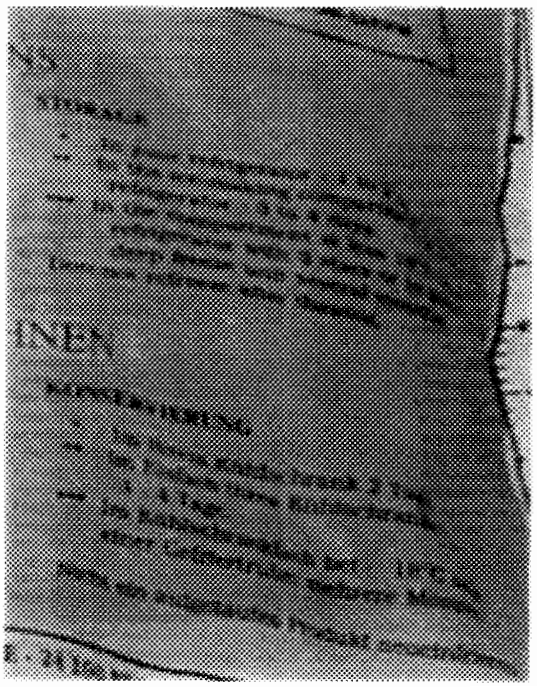
d. Thiriet Product Specifications by Product Type

c. Thiriet Packaging

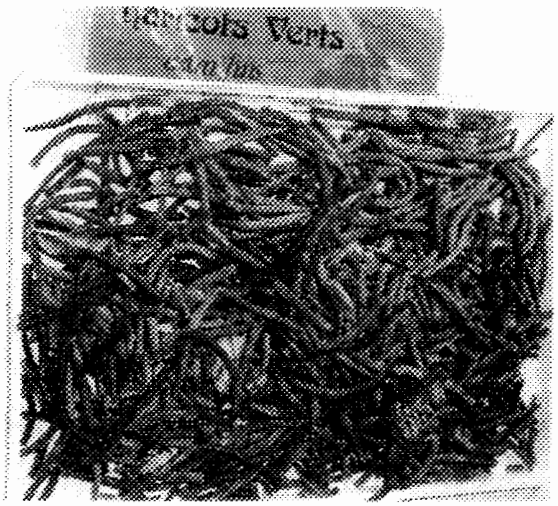








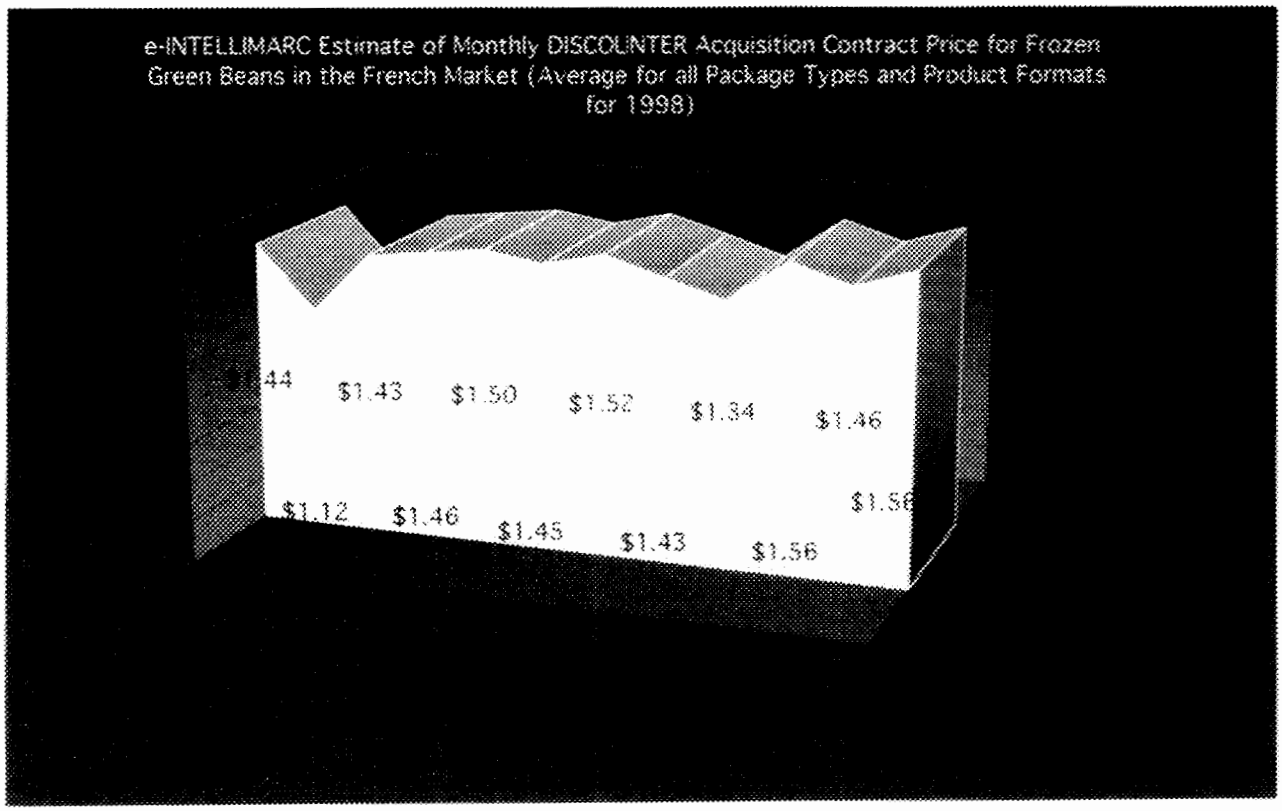
d. Thiriet Product Specifications by Product Type



8.Lidl: Discounter Supermarket Buyer Brief

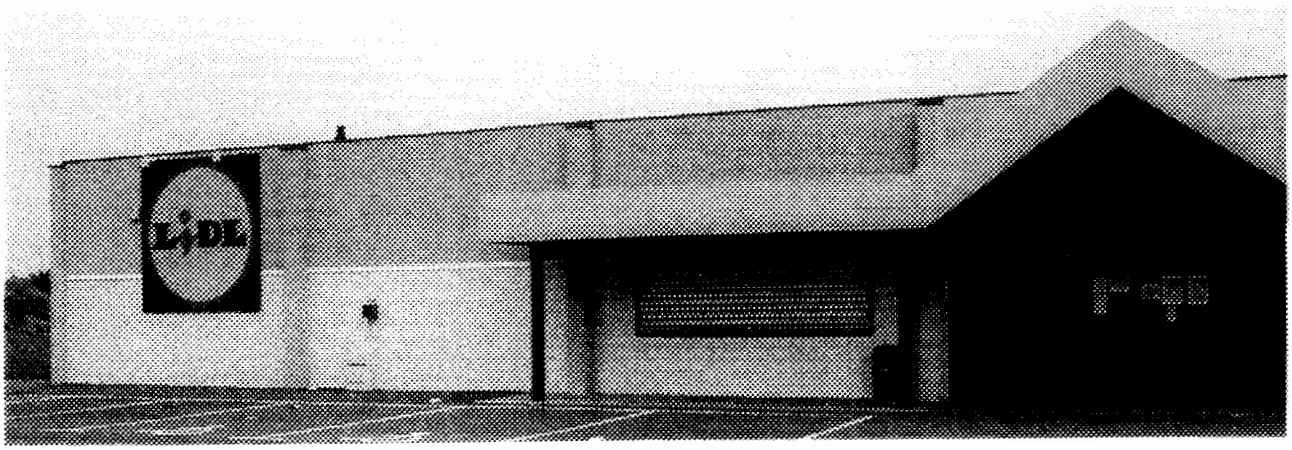
a. Estimated Buyer Acquisition Contract Prices for All Discounter Supermarkets

The graph below presents the SRD/*e-intellimarc* estimates of the acquisition contract price paid on average by all discounter supermarkets for all product types and package sizes. Since a particular chain is not likely to be negotiating a new acquisition contract each month, these estimates do not measure a specific transaction. They are intended only as general guidelines based on estimated margins and seasonal fluctuations in import product costs.



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

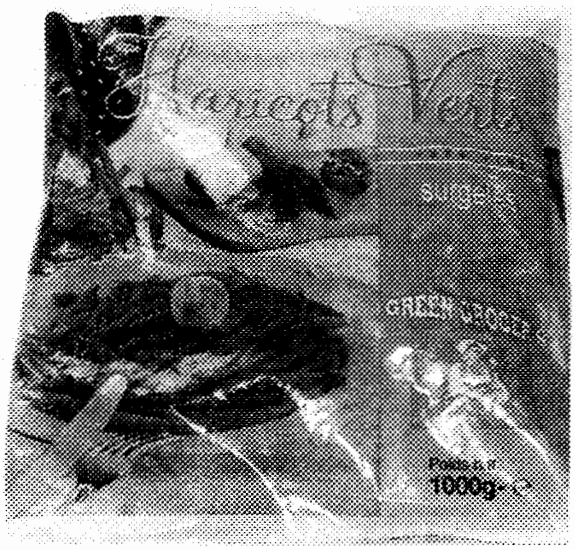
The estimates on the next page provide more precise estimates of acquisition costs for specific chains, different types of products, different packaging types and sizes. The acquisition price estimates by package size and type can give potential exporters a more refined idea of the quality and price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

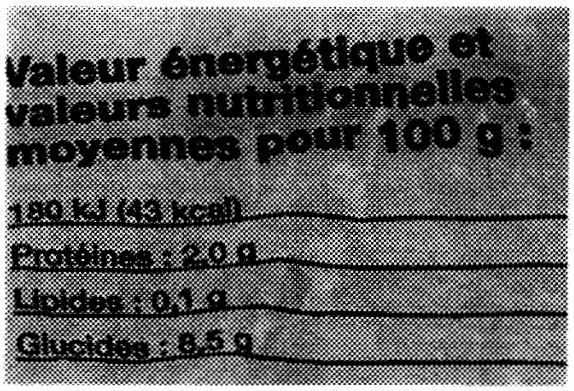


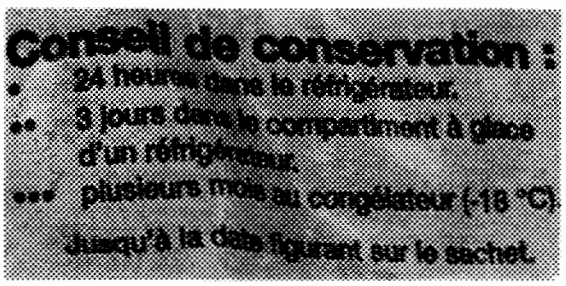
oping concrete feasibility studies and export business plans. Retail chains do not release their actual acquisition contract pricing for public information. These estimates are based on SRD's best secondary information on retail to acquisition margins, applied to direct measurements of actual retail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

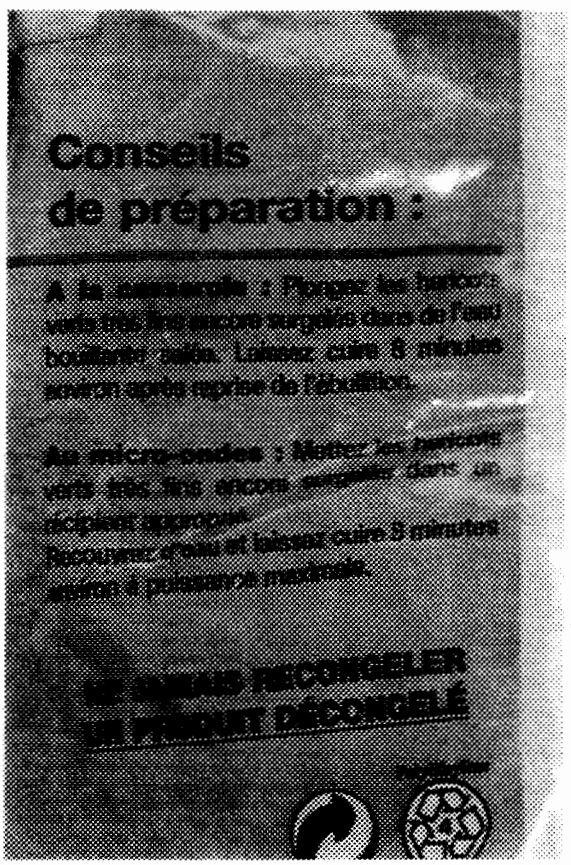
Product Type	Very Fine Green Beans
Brand	Green Grocer's
Package Type	Plastic
Height cm	32
Width cm	30
Depth cm	4
SHELF SPACE (Cubic Centimeters)	46,080
Price Local Currency	11.9
Price in USD	$1.90
USD/Kilo Include Package	$1.90
USD/Kilo (Net Product)	$1.90
Gross Weight (Including Package) grams	1000
Net Weight (Product Only) grams	1000
Est. Aug 99 Retailer's Contract Prices	
US$/Package	$1.44
US$/Kg. Net Product	$1.44

c. Lidl Packaging

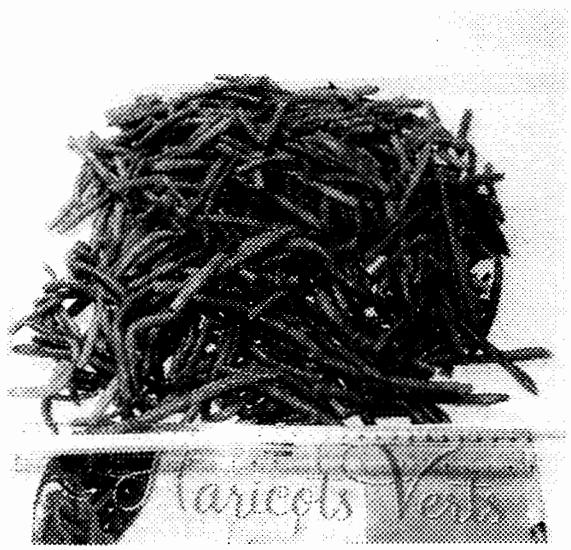








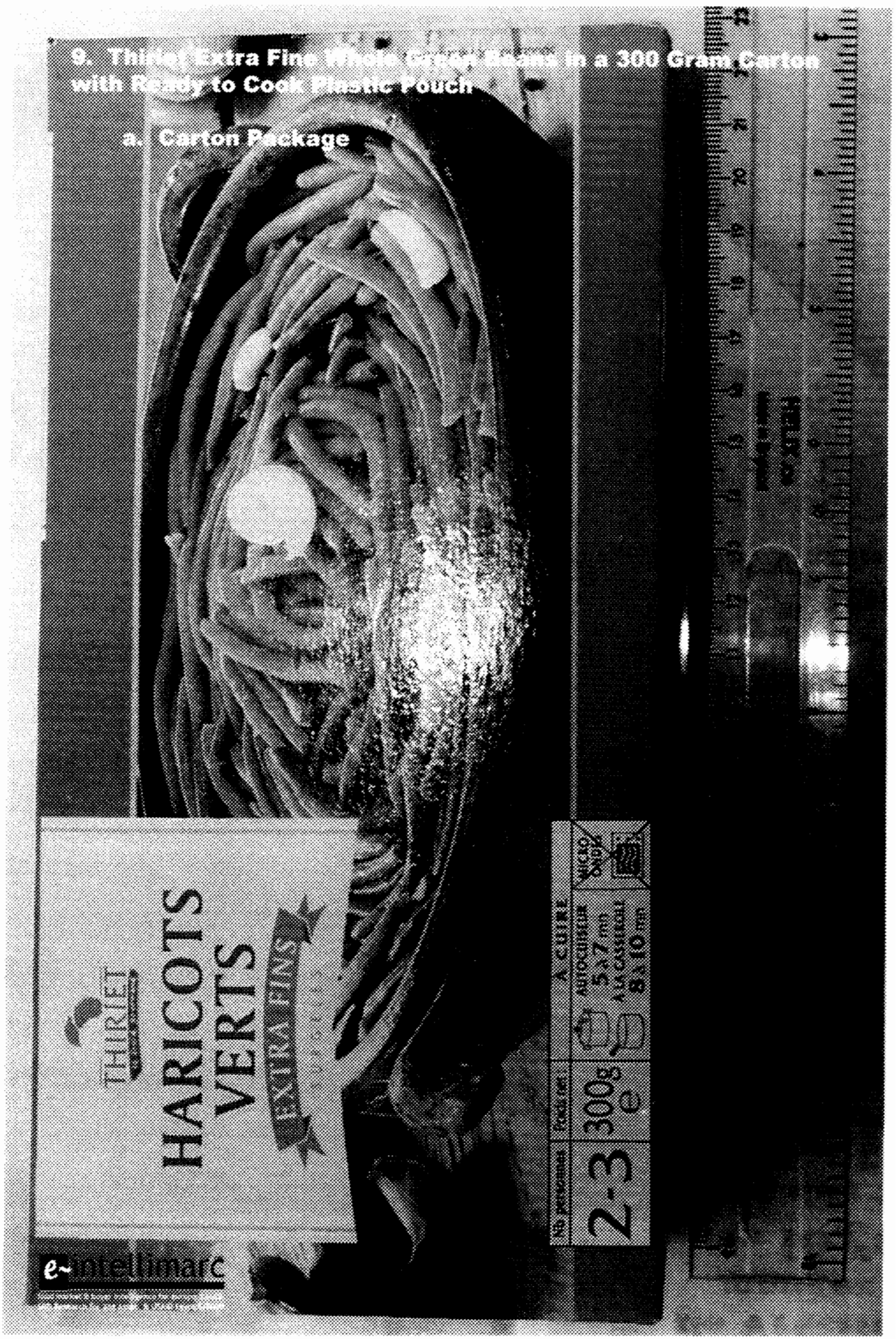
d. Lidl Product Specifications by Product Type

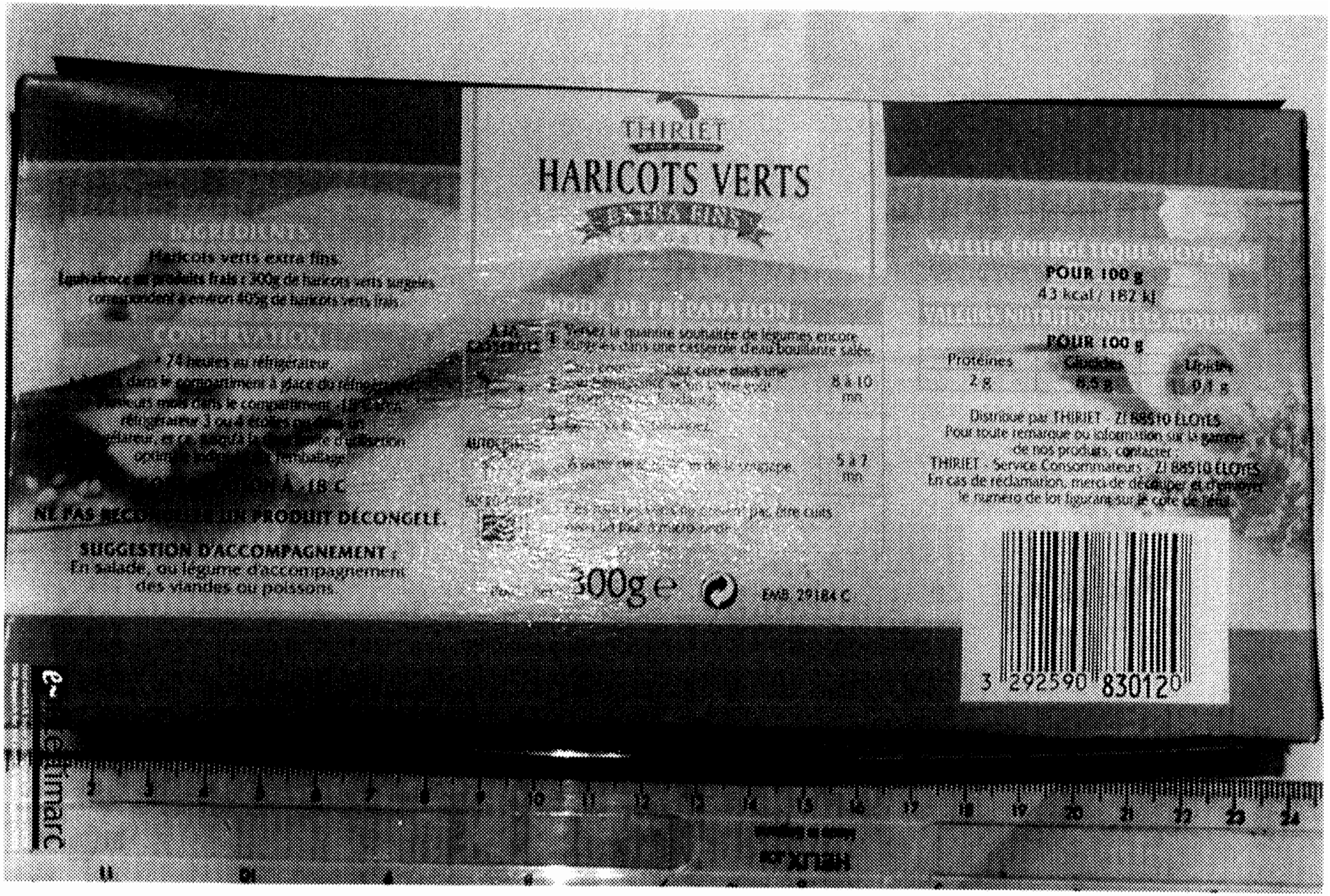


PART FOUR: EXAMPLE FULL SIZE PACKAGING & PRODUCT QUALITY SPECIFICATIONS

9. Thirlet Extra Fine Whole Green Beans in a 300 Gram Carton with Ready to Cook Plastic Pouch

a. Carton Package



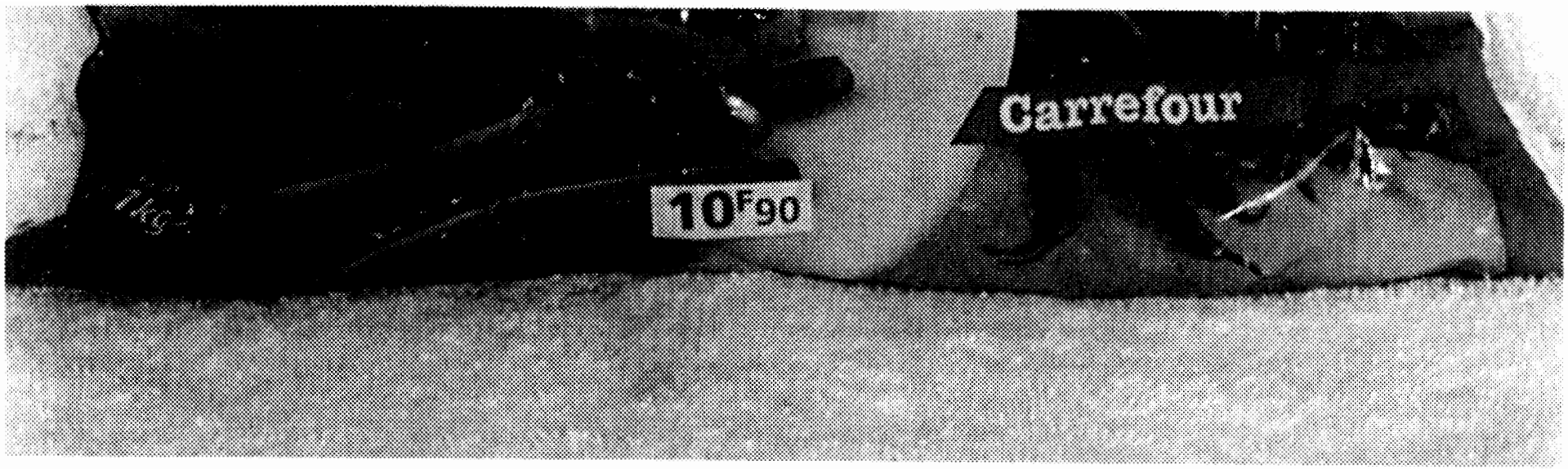

THIRIET
HARICOTS VERTS
EXTRA FINS
INGRÉDIENTS :
Haricots verts extra fins.
CONSERVATION :
NE PAS RECONGELER UN PRODUIT DÉCONGELÉ.
SUGGESTION D'ACCOMPAGNEMENT :
En salade, ou légume d'accompagnement des viandes ou poissons.
MODE DE PRÉPARATION :
8 à 10 mn
5 à 7 mn
300g e
EMB. 29184 C
VALEUR ÉNERGÉTIQUE MOYENNE
POUR 100 g
43 kcal / 182 kJ
VALEURS NUTRITIONNELLES MOYENNES
POUR 100 g
Protéines
2 g
Glucides
8,5 g
Lipides
0,1 g
Distribué par THIRIET - ZI 88510 ÉLOYES
Pour toute remarque ou information sur la gamme de nos produits, contacter :
THIRIET - Service Consommateurs - ZI 88510 ÉLOYES
En cas de réclamation, merci de découper et d'envoyer le numéro de lot figurant sur le côté de l'étui.
3 292590 830120

b. Ready to Cook Plastic Pouch

b. Product Quality Specification

10. Carrefour Very Fine Whole Green Beans in a 1 Kilo Plastic Bag

a. Plastic Bag Package


Carrefour
10F90
1kg

HARICOTS VERTS TRÈS FINS

SURGELÉS

Ingrédients :
Haricots verts extra fins de Bretagne.

Mode de préparation :

Pour 500 g :
Cuisson à la casserole : mode de cuisson recommandé.
Dans trois quarts de litre d'eau bouillante salée, verser 500g de haricots surgelés. Ramener à ébullition et cuire à découvert 10 à 12 minutes. Égoutter.

Cuisson à l'autocuiseur :
Mettre deux verres d'eau dans l'autocuiseur.
Verser 500g de haricots surgelés dans le panier en position haute, refermer et laisser cuire à feu moyen 4 minutes dès sifflement de la soupape.

Cuisson au micro-ondes : mode de cuisson déconseillé.

Pour 1 kg :
Cuisson à la casserole : mode de cuisson recommandé.
Dans un litre et demi d'eau bouillante salée, verser 1 kg de haricots surgelés. Ramener à ébullition et cuire à découvert 10 à 12 minutes. Égoutter.

Cuisson à l'autocuiseur :
Mettre quatre verres d'eau dans l'autocuiseur.
Verser 1 kg de haricots surgelés dans le panier en position haute, refermer et laisser cuire à feu moyen 4 minutes dès sifflement de la soupape.

Cuisson au micro-ondes : mode de cuisson déconseillé.

	Casserole	Autocuiseur	Micro-ondes	
			750 W	1000 W
500 g	10 à 12mn	4 mn	déconseillé	
1kg	10 à 12mn	4 mn	déconseillé	

Valeurs énergétiques moyennes pour 100 g :
182 kJ – 41 kcal

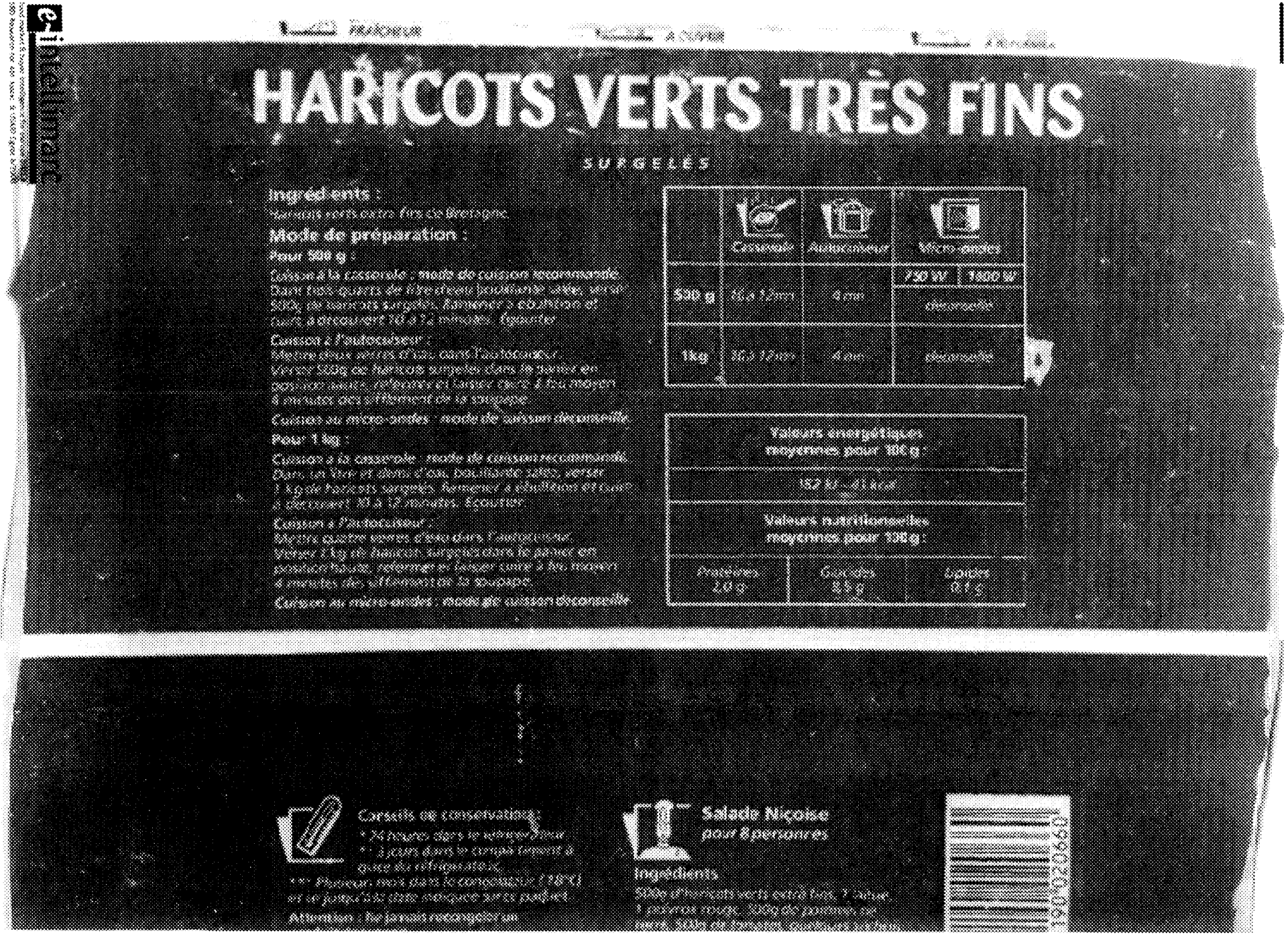
Valeurs nutritionnelles moyennes pour 100 g :		
Protéines 2,0 g	Glucides 8,5 g	Lipides 0,1 g

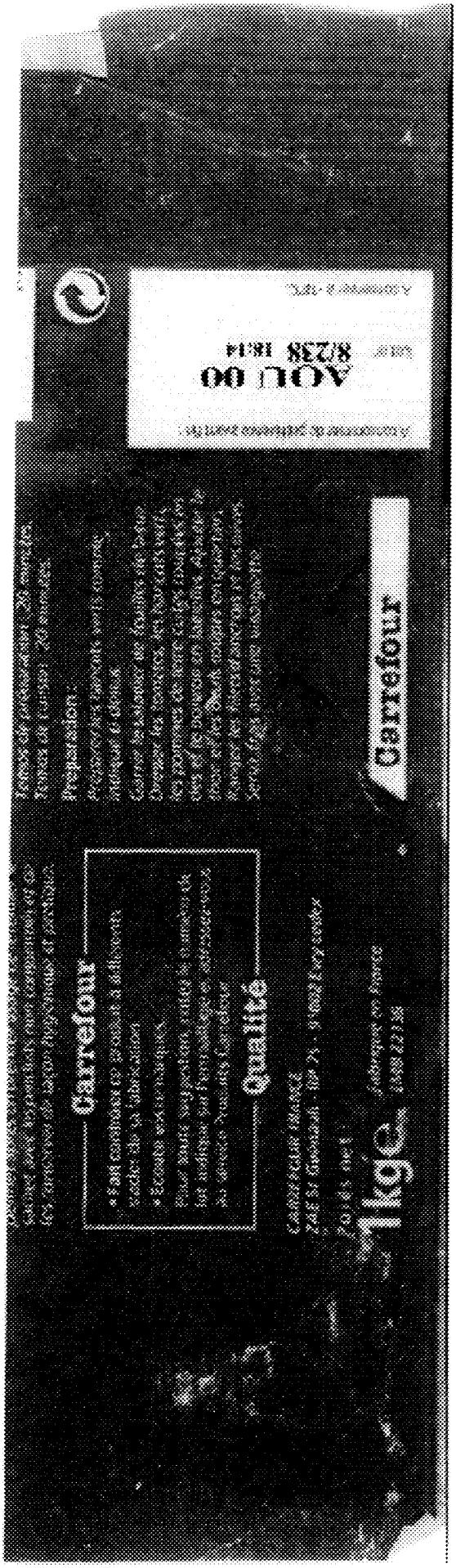
Conseils de conservation :
* 24 heures dans le réfrigérateur.
** à jours dans le compartiment à glace du réfrigérateur.
*** Plusieurs mois dans le congélateur (18°C) et ce jusqu'à la date indiquée sur ce paquet.

Attention : ne jamais recongeler un

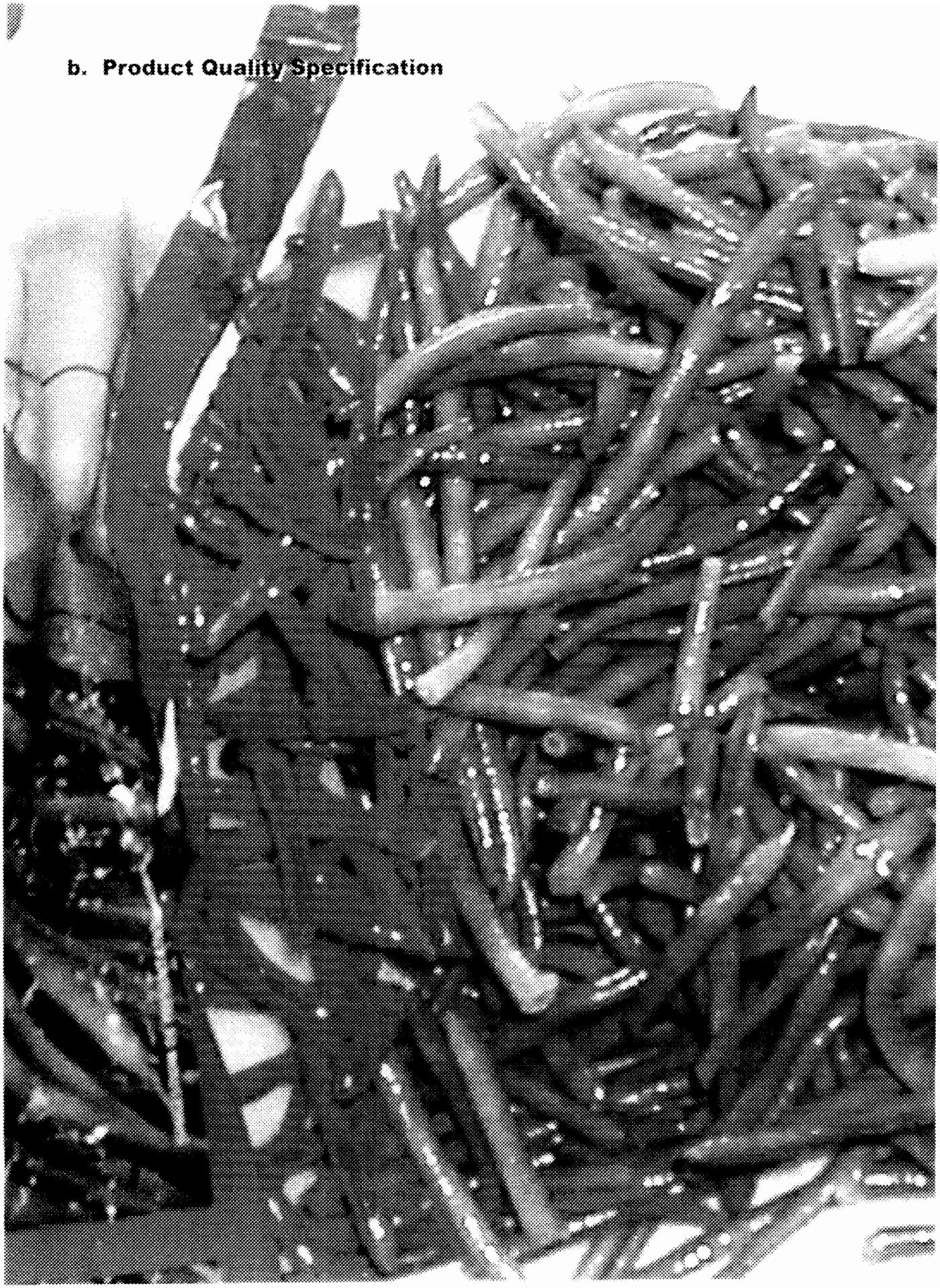
Salade Niçoise
pour 8 personnes

Ingrédients
500g d'haricots verts extra fins, 1 laitue, 1 poivron rouge, 500g de pommes de terre, 500g de [illegible]




Carrefour
Qualité
1kg
Carrefour
AOU 00
8/238 18:14

b. Product Quality Specification



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