



What's Hot Around the Globe

Insights on Growth in Food and Beverages

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Insights on Growth in Food and Beverages



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The information contained in this report has been collected from ACNielsen Marketing Information groups in 47 countries around the world. For questions, or to obtain more detailed information by country, please contact your local ACNielsen Global Services representative or contact Clare Nishikawa at clare.nishikawa@acnielsen.ca

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Introduction

ACNielsen's report on growth categories around the world began at the request of a number of multi-national manufacturers and retailers that are looking to grow their business globally through new market and category expansion. This report focuses specifically on growth within the food and beverage industries. Growth trends on categories that fall into the Health Care area (e.g. cough and cold remedies, diet aids, vitamin and nutritional supplements, etc.) were not included in this report.

Ninety Categories Reviewed Across Forty-Seven Countries

In preparing this report, we studied over 90 food and beverage categories. The primary sources of information came from purchasing information in supermarkets, hypermarkets and mass merchandisers, generally excluding such channels as foodservice outlets (and in some cases convenience stores and pharmacies). In addition, due to the fact that all categories were not available or measured in all of the countries studied, we have cited in our findings the actual number of countries included.

Identifying "global" consumer trends really begins with understanding a wide disparity of local consumer behavior. With services worldwide, ACNielsen measures retail purchases in nearly 100 countries. This study specifically focused on 47 key countries across both developed and developing markets. The countries included in the study account for over 95% of the world's gross domestic product (GDP) and over 70% of the world's population.

Growth Trends Identified Regionally and Globally

From our local analyses, we have identified those trends that have some level of consistency on either a regional or global basis. It is important to note that we looked across a wide range of categories, from very large to very small. Not surprisingly the categories with the hottest growth rates, and the ones that we will be focusing on in our analysis were generally smaller, newer categories. For additional perspective, we have also included a look at those categories with the biggest growth year-over-year in absolute dollars.

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Introduction continued

In analyzing local trends, value sales in local currency were used. Although volume measures were looked at, they are not presented in this report due to inconsistencies in product form and measure across categories and countries, thus preventing comparisons and consolidation (e.g. tablets versus powders versus ounces versus liters). Please note that if significant price increases occurred within a category, these increases would have had an impact on the category growth rates.

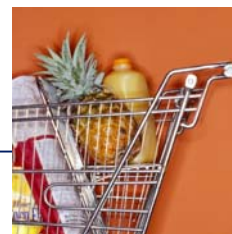
In addition, there were several countries that were experiencing hyper-inflationary or recessionary economies. Since our analysis is based on value sales, we have looked at the information with and without these countries in order to gain a more accurate perspective on the growth categories.

Please note that global aggregations were created by converting local currency to U.S. dollars using a constant exchange rate across the three-year period.

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Global Findings - Fastest Growing Categories

Nine Categories Experience Double-Digit Growth

Overall there are nine categories whose value sales grew by 10% or more on a consolidated "global" basis in 2001. Each of these nine categories were present in at least two of the five regions studied and showed growth in two-thirds or more of the local markets in which they were measured.

A Summary of the Fastest Growing Categories

2001 Growth Categories	Number of Markets Growing/ Measured	Growth Rate 99-00	Growth Rate 00-01	Relative Size of Category Sales*
Prepared Alcoholic Beverages Spirit/ Wine Based Drinks and Malternatives	13 of 16	64%	33%	2
Refrigerated Ready-to-Eat Meals and Meal Makers	13 of 15	13%	13%	2
Water (Still and Carbonated)	41 of 45	6%	13%	4
Drinkable Yogurts and Other Dairy Based Drinks (Excluding regular Milk)	31 of 37	10%	12%	3
Frozen Meat/Poultry/Game	19 of 22	6%	12%	2
Refrigerated Salads	8 of 8	13%	11%	2
Frozen Fruit	8 of 12	5%	10%	1
Frozen Fish/Shellfish/Seafood	17 of 23	5%	10%	2
Refrigerated Dips/Dressings/Sauces	11 of 11	8%	10%	1

* Relative Category Size Groupings

(Based on consolidated value sales from countries and channels included in this report)

1. Under \$1 Billion
2. 1 – \$5 Billion
3. \$5 – 10 Billion
4. \$10 – 15 Billion
5. Over \$15 Billion

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Convenience, Health and New Product Innovations Are Driving Global Growth

Finding common “global” threads across 40+ markets is a challenging task. As we looked across the 47 markets and five regions included in our report, however, there were a number of consistent trends that did appear.

Water Is Growing Everywhere You Go

In every region around the world, the Water category (including still and carbonated products) showed growth. Fueled by new product entries, a concern for health and safety and the need for a convenient, portable drink alternative, the category grew by 13% in the last year.

Convenience and Portability Cross Category Lines

In a number of categories, the need for convenience and portability contributed to growth. Ready-to-Eat Meals and Meal Makers, particularly refrigerated meals, grew globally, and in some regions frozen or shelf stable meals also showed significant growth.

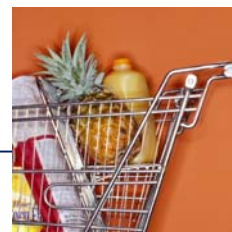
Other ready-to-go type product categories (for example, Refrigerated Salads, and Cereal/ Muesli Bars) also showed strong growth. It is apparent that across categories and countries, consumers were focused on products that were ready-to-consume or convenient-to-use.

Concern Over Health and Safety Is Apparent

Consumer demand for healthy or simply ‘safe’ products drove increased sales in a number of categories. Growth of products such as Drinkable Yogurts, Soy-based Milk products, Sports/Energy Drinks, Frozen Fruits, Special Fortified Milks and Frozen Meats/Poultry and Fish/Seafood, all were impacted by the demand for health and safety.

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New Products and Category Innovations Spur Growth

Not surprising to global marketers, new products fueled the growth in a number of key categories. New water varieties helped to drive an already growing category, with fortified waters, sports waters and flavored waters creating new excitement for consumers worldwide.

In the Prepared Alcoholic Beverages category we saw new spirit based ready-made drinks and malternatives (malt-based, non-beer alternatives) emerge, driving a category that was once owned primarily by wine-based coolers.

Drinkable Yogurts had a number of new products, flavors and packaging innovations. With more flavored milk-based drinks and soy-based milk alternatives entering the marketplace, this combined category had significant new product activity.

One Additional Thought

Sports/ Energy Drinks – Not in Top Nine – But Growing in Over 30 Countries

Surprisingly, the consolidated growth rate for Sports/ Energy Drinks was less than 10% globally. In 31 markets (out of the 40 measured), however, the category did show growth, supporting the trend for healthier beverage alternatives. New product innovations (particularly in the energy drink segment) generated new consumer enthusiasm in the category. Particularly strong growth for the category was seen in Europe and the Emerging Markets.

In Summary...

We found that consumers are looking for healthy, innovative products that are safe and convenient to use.

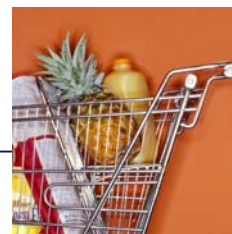
Although our findings may not be surprising to many, the fact that these findings are truly global is a confirmation that the purchasing behavior of consumers around the world is more similar than one might expect.

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Insights on the Fastest Growing Categories

➤ Prepared Alcoholic Beverages Lead Growth Rates (Spirit/ Wine based drinks and Malternatives)

Prepared Alcoholic Beverages experienced the largest overall growth globally during the three-year period. In 2000, the category grew by 65%, followed by a 33% growth in 2001. Once made up primarily of wine coolers, this category has been fueled by new product introductions, including a number of vodka and rum based alternatives, as well as malternatives (malt-based, non-beer alternatives) particularly in the U.S.

Information was available for the category in 16 of the 47 markets, with significant growth in 13 of the 16 markets in 2001.

➤ Refrigerated Ready-to-Eat Meals and Meal Makers Lead Food Categories

Ready-to-Eat Meals that come fully prepared with all the ingredients for a complete meal come in three separate forms: refrigerated, shelf-stable and frozen. All three categories showed growth, with the strongest growth, however, in the relatively new category of **Refrigerated Ready-to-Eat Meals and Meal Makers** (including refrigerated pastas). Growth in this category was 13% in both 2000 and 2001. **Frozen Ready-to-Eat Meals** grew by 7% in 2001 with particularly strong growth in Latin America, while **Shelf-Stable Meals** grew by 6% overall with solid growth in the Emerging Markets, Asia Pacific and North America.

Fueled by the need for convenience and the continued introduction of new product assortments, these categories are made for busy lifestyles. Not surprisingly, a high percentage of the refrigerated segment was found in the more developed, higher-income economies.

Information for Refrigerated Ready-to-Eat Meals and Meal Makers was available in 15 markets, with 13 of the 15 markets showing growth in 2001. The Frozen sector grew in 25 of the 27 markets measured, the shelf-stable sector in 15 of 21 markets.

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➤ **Water, Water Everywhere**

In 2000, the **Water** category (including both still and carbonated products) grew by 6% versus previous year, followed by a 13% growth in 2001. Although Water was a strong growth category in every region, the highest category growth in 2001 was in North America (21%), followed by Latin America (16%).

New innovations in the Water category drove growth including fortified water, “sports” water and flavor-enhanced water. In addition to new product entries into the category, consumer concern over the quality of local water was one of the contributing factors driving “still” water growth.

With information available in 45 of the 47 markets, the Water category showed growth in 2001 in 41 of the 45 markets measured.

➤ **Drinkable Yogurts and Other Dairy-Based Drinks Are Healthy Lifestyle Alternatives**

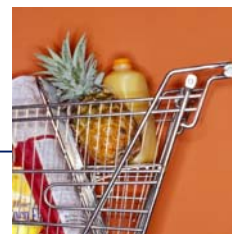
Drinkable Yogurts and Other Dairy-Based Drinks (yogurt drinks, shakes, flavored milk, eggnog) experienced double-digit growth over the three-year period. Growing by 10% in 2000 and 12% in 2001, there were a number of new innovations across the category including drinks with live cultures, fortified flavored drinks, new flavor introductions and soy-based drinks. Drinkable Yogurts was one of the primary growth segments for the category, with a significant number of new products contributing to its growth.

Information for the Drinkable Yogurt and Dairy-Based Drinks category was available in 37 markets with 31 of the 37 markets showing growth in 2001.

Shelf-Stable and **Refrigerated Milk** also showed growth in 2001 of 8% and 7% respectively.

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➤ **Frozen Meats and Fish - Both Show Strong Growth**

Frozen Meats/Poultry/Game and **Frozen Fish/Shellfish/Seafood** represent two of the top nine global growth categories. With information in over 20 markets, these categories saw increased growth last year in 19 and 17 markets respectively. The percentage growth for Frozen Meats/Poultry/Game was 12% in 2001, compared to 6% in 2000. For Frozen Fish/Shellfish/Seafood the growth in 2001 was 10% compared to 5% in 2000.

It is important to note that in certain markets, the growth rate for meats was impacted by increasing prices as a result of required new safety testing.

A number of other factors impacted the growth in these categories as well including:

- Convenience (e.g. ready-made frozen hamburgers)
- Concern over food safety with local meats, fueling the purchase of imported frozen meats or fish alternatives (this is specific to certain markets)
- Growth in lower priced frozen private label alternatives.

The **Fresh Meat/Poultry/Game** category also showed high single-digit growth in 2001 in 10 out of 14 markets measured. Again, since the measures used were based on value sales, rising meat prices, particularly in certain European markets, would have impacted this growth.

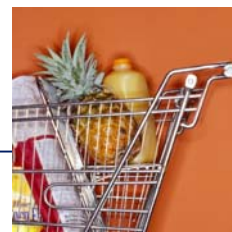
➤ **Refrigerated Salads Growth Driven by Need for Convenience**

With information available in only 8 of the 47 markets (6 countries in Europe and 2 in North America), **Refrigerated Salads** showed growth in all of the eight markets. In 2001 Refrigerated Salads grew by 11%, following a 13% growth in 2000.

Definitely a product of convenience for busy lifestyles, it was not surprising that the markets measured were all located in the developed, higher-income economies. Like the refrigerated meals and meal makers cited earlier in this report, products in this category (including the more recently introduced bagged salad kits), fill a need for “complete” convenience.

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Refrigerated Categories continued

A related category, **Refrigerated Dips/Dressings/Sauces** also showed double-digit growth overall in 2001 (10%). In all of the 11 markets in which this category was measured, the category showed growth.

➤ Frozen Fruits Double Growth

Frozen Fruits grew by 10% in 2001, doubling its growth rate from 2000. With growth in 8 of the 12 markets measured, this category is now a new niche for some markets.

Three Drivers Impact Growth Globally

Convenience and Portability, Health and Safety, New Products and Category Innovation were the three primary global growth drivers. When identifying the drivers for each of the nine double-digit growth categories, some categories grew as a result of only one - some as a result of all three. In the regional findings, we will look at all categories that grew by double digit rates within the region and map them against these same three drivers.

Convenient/Portable	Health/Safety	New Products and Category Innovation
Prepared Alcoholic Beverages		Prepared Alcoholic Beverages
Frozen Meats/Poultry	Frozen Meats/Poultry	Frozen Meats/Poultry
Refrigerated Ready-to-Eat Meals and Meal Makers		Refrigerated Ready-to-Eat Meals and Meal Makers
Water	Water	Water
Drinkable Yogurts and Dairy Drinks	Drinkable Yogurts and Dairy Drinks	Drinkable Yogurts and Dairy Drinks
Salads	Salads	Salads
Frozen Fruit	Frozen Fruit	
Dips/Dressing/Sauces		
Frozen Fish/Seafood		

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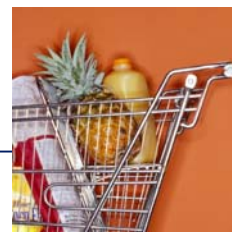
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Categories with the Largest Growth

In the above findings, we looked at which categories experienced the fastest growth by looking at growth rates in value sales versus year ago. Not surprisingly, with the exception of Water, the categories that were growing the fastest were the smaller categories whose growth rates were calculated from a small base.

For a slightly different perspective, we have identified below those categories that had over a billion dollars in actual growth versus year ago. Again, since our analyses are based on value sales, price increases in some cases significantly impacted the absolute value growth.

There were eight categories in total that grew by over a billion dollars in sales (2001 versus 2000). Aggregated growth for each category was between \$1-3 billion dollars, with Beer experiencing the largest growth at \$3 billion and Wine having just over a billion dollars of growth. Across the regions, growth was fairly consistent, with each category experiencing growth in two-thirds or more of the markets measured. It is interesting to note that five of the eight categories were beverages.

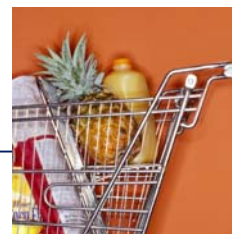
Categories with Over a Billion Dollars in Growth in 2001 (Ranked by Absolute Growth)	Number of Markets Growing/ Measured	Growth Rate 99-00	Growth Rate 00-01
Beer/ Lager/ Ales	28 of 37	4%	5%
Carbonated Beverages	27 of 39	6%	6%
Refrigerated Cheese	35 of 42	4%	7%
Water (Still and Carbonated)	41 of 45	6%	13%
Refrigerated Dairy/ Milk/ Cream	26 of 30	0%	7%
Refrigerated Meat/ Poultry/ Game	10 of 14	8%	9%
Snacks (chips, pretzels, popcorn, mixes, etc.)	37 of 47	7%	5%
Wine	20 of 28	5%	5%

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Regional Findings - Fastest Growing Categories

North America

Overall in North America, we see similar consumer needs as we saw globally - the need for convenient, healthy and innovative products. Across the top nine fastest growing global categories, almost all showed double-digit growth in North America. The one exception was Refrigerated Dips growing at slightly less, 9% in North America versus 10% globally.

In addition to the top nine, there were a number of other categories having double-digit growth in North America. Most of the categories fell into at least one of the three classifications...convenient, healthy or innovative. The one exception was the Butter/Margarine category whose growth was primarily attributable to an increase in commodity pricing in the US.

Double-Digit Growth Categories in North America

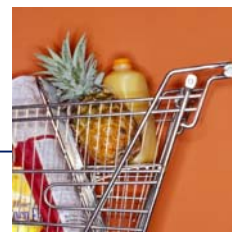
Categories included in the Globe's Fastest Growing Categories

Additional Categories with Double-Digit Growth in North America

Convenient/Portable	Health/Safe	New Products and Category Innovation	Other
Prepared Alcoholic Beverages		Prepared Alcoholic Beverages	
Refrigerated Ready-to-Eat Meals and Meal Makers			
Frozen Meats/Poultry			
Water	Water	Water	
Drinkable Yogurts and Dairy Drinks	Drinkable Yogurts and Dairy Drinks	Drinkable Yogurts and Dairy Drinks	
Salad	Salad	Salad	
Frozen Fruit	Frozen Fruit		
Frozen Fish/Seafood			
Frozen Baking/Cooking Aids (e.g. dough)	Protein Based Meat Alternatives	Frozen Breads	Butter/Margarine
Frozen Cakes	Vegetables/Salad		
	Vegetables -Fresh		
	Fruits/Nuts-Fresh		
	Fresh Herbs/Spices		

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Latin America

Of the top nine global growth categories, only three experienced double-digit growth in Latin America: Water, Drinkable Yogurts and Dairy-Based Drinks, and Frozen Meat/Poultry. Not only did Frozen *Meats* show double-digit growth, Frozen *Ready-to-Eat Meals* also grew by 25% in 2001.

Nine other categories grew by double-digit rates in the region including Cereal/ Muesli Bars that grew at 22% in the last year.

Double-Digit Growth Categories in Latin America

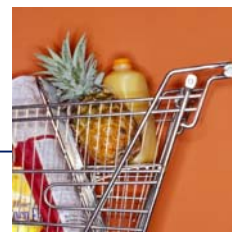
Categories included in the Globe's Fastest Growing Categories

Additional Categories with Double-Digit Growth in Latin America

Convenient/ Portable	Health/Safety	New Products and Category Innovation	Other
Frozen Meats/Poultry		Frozen Meats/Poultry	
Water	Water	Water	
Drinkable Yogurts and Dairy Drinks	Drinkable Yogurts and Dairy Drinks	Drinkable Yogurts and Dairy Drinks	
Cereal/ Muesli Bars	Cereal/ Muesli Bars	Cereal/ Muesli Bars	
Frozen Ready-to-Eat Meals		Frozen Ready-to-Eat Meals	
	Cheese-Refrigerated		Shelf Stable Milk
Carbonated Beverages		Dilutables and Concentrate	Beers/Lagers/Ales
Noodle/Pasta/Rice Meal Makers			Baby Drinks

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Europe

Since our analysis is based on value sales, to understand the European trends we have excluded the hyper-inflationary market of Turkey from the regional findings below.

Europe experienced double-digit growth in six of the nine global growth categories. Prepared Alcoholic Beverages led the region's growth rates at 33%. Although the remaining three categories did not show *double-digit* growth (compared to the global nine), they did show growth. The Water category grew by 9%, with Frozen Fruit and Frozen Fish growing by 3% and 7% respectively. Fresh Fish/Seafood outpaced its frozen counterpart growing by 10% in 2001.

Other top categories with high growth rates included: Cereal/ Muesli Bars at 22% and Sports/ Energy Drinks at 17%.

Double-Digit Growth Categories in Europe

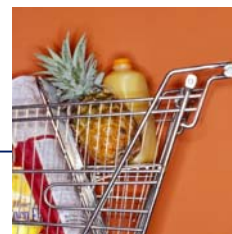
Categories included in the Globe's Fastest Growing Categories

Additional Categories with Double-Digit Growth in Europe

Convenient/Portable	Health/Safety	New Products and Category Innovation	Other
Prepared Alcoholic Beverages		Prepared Alcoholic Beverages	
Frozen Meats/Poultry	Frozen Meats/Poultry		
Refrigerated Ready-to-Eat Meals and Meal Makers			
Salads	Salads	Salads	
Drinkable Yogurts and Dairy Drinks	Drinkable Yogurts and Dairy Drinks	Drinkable Yogurts and Dairy Drinks	
Refrigerated Dips/ Dressings/Sauces			
Cereal/ Muesli Bars	Cereal/ Muesli Bars	Cereal/ Muesli Bars	
Sports/Energy Drinks	Sports/Energy Drinks	Sports/Energy Drinks	
Fresh Cakes	Fresh Fish/Seafood		
	Savory Spreads		
	Fresh Meat/Poultry		Fresh Meat/Poultry
Frozen Soups	Frozen Soups	Frozen Soups	
Non-Carbonated, Fruit-Flavored Drinks	Non-Carbonated, Fruit-Flavored Drinks	Non-Carbonated, Fruit-Flavored Drinks	

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Emerging Markets

When analyzing the information in the Emerging Markets, two Eastern European countries that were included in the global analysis were experiencing hyper-inflationary economies (Russia and the Ukraine). Since our analysis is based on value sales, we have excluded them in the regional analysis to gain a more accurate growth perspective on the other markets.

Looking at the nine fastest growing global categories, only one - Frozen Meat/Poultry experienced double-digit growth across multiple countries (15% growth in 2001, with 3 out of 5 markets experiencing growth).

Information on Prepared Alcoholic Beverages was available for only one market, South Africa, and it grew by nearly 50% in that country. Although Water showed growth in the region in 6 of the 7 markets measured, it did not experience double-digit growth (growth was 5%). Information on the fresh/refrigerated categories of Ready-to-Eat Meals, Meal Makers and Salads and the Frozen Fruit category was not available in the region.

The fastest growing category in the region was the developing category of Sports/ Energy Drinks, growing in 5 out of 6 markets. It grew by over 50%.

Double-Digit Growth Categories in the Emerging Markets

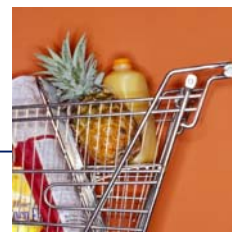
Categories included in the Globe's Fastest Growing Categories

Additional Categories with Double-Digit Growth in the Emerging Markets

Convenient/Portable	Health/Safety	New Products and Category Innovation	Other
Frozen Meat/Poultry		Frozen Meat/Poultry	
Sports/Energy Drinks	Sports/Energy Drinks	Sports/Energy Drinks	
Shelf-Stable Fish/Seafood	Shelf-Stable Fish/Seafood		
Shelf-Stable Ready-to-Eat Meals		Shelf-Stable Ready-to-Eat Meals	
Shelf-Stable Savory Biscuits/Crackers	Shelf-Stable Fruits and Nuts		
			Bread

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Asia Pacific

Asia Pacific is a region made up of a wide diversity of cultures and consumption. Due to this marketplace diversity, availability of information on all of the categories across all of the countries was somewhat limited.

In addition, with Japan experiencing a significant recession, and China's coverage rapidly changing as new markets have been added, their impact on value sales for the region was significant. Therefore, we have looked at growth with and without these two countries and have footnoted those results that exclude Japan and China with an asterisk.

The Water category consistently measured across 11 markets was growing in 9 of the 11 countries. Its overall growth rate for 2001 was 7%. When Japan and China were excluded, Water grew by 14%.

Overall, the highest growth rate category across Asia Pacific was Non-Carbonated Fruit-Flavored Drinks with a 21% growth rate. When you exclude Japan and China, Ready-to-Drink Tea also appears as a double-digit growth category, growing by 24%.

The Wine category grew by 14% as consumers switched to more expensive varieties.

Double-Digit Growth Categories in Asia Pacific

Categories included in the Globe's Fastest Growing Categories

Additional Categories with Double-Digit Growth in Asia Pacific

Convenient/Portable	Health/Safety	New Products and Category Innovation	Other
Water*	Water*	Water*	
			Wine
Ready-to-Drink Tea*			
Non-Carbonated, Fruit-Flavored Drinks	Non-Carbonated, Fruit-Flavored Drinks	Non-Carbonated, Fruit-Flavored Drinks	
		Breakfast Cereals/Pastries	
Shelf-Stable Savory Biscuits/Crackers*			

* Excludes China and Japan

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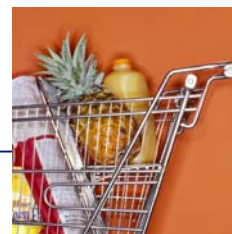
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Methodology

In *What's Hot Around the Globe!*, trends across over 90 food and beverage categories, in 47 countries and 5 regions were analyzed. The 47 markets account for 95% of the world's GDP and over 70% of the world's population. Since some categories either do not exist or are not monitored in all markets, we have included in our findings the number of countries in which the category is measured.

Countries Included

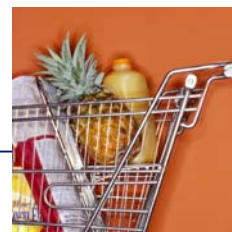
Latin America <ul style="list-style-type: none">— Argentina— Brazil— Central America*— Chile— Colombia— Mexico— Puerto Rico	Europe <ul style="list-style-type: none">— Austria— Belgium— Denmark— Finland— France— Germany— Great Britain— Greece— Ireland— Italy— Netherlands— Norway— Portugal— Spain— Sweden— Switzerland— Turkey
Asia Pacific <ul style="list-style-type: none">— Australia— China— Hong Kong, China— India— Indonesia— Japan— Korea, Rep. (South Korea)— Malaysia— New Zealand— Philippines— Singapore— Thailand	Emerging Markets <ul style="list-style-type: none">— Czech Republic— Egypt, Arab Rep.— Hungary— Poland— Russian Federation— Saudi Arabia— South Africa— Ukraine— United Arab Emirates
North America <ul style="list-style-type: none">— United States— Canada	

* Includes the countries of Belize, Costa Rica, El Salvador, Guatemala, Honduras, Nicaragua, Panama

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Food and Beverage Categories Reviewed

Baby Foods

- Baby Drinks
- Baby Food
- Baby Snacks

Alcoholic Beverages

- Prepared Alcoholic Beverages
- Beer/ Lager/ Ales
- Cider
- Liqueurs
- Spirits
- Wine

Non-Alcoholic Beverages

- Cocoa/ Chocolate/ Malted Drinks
- Coffee
- Dairy Based Drinks & Drinking Yogurt
- Dilutables & Concentrates
- Carbonated Beverages
- Non-Carbonated Fruit-Flavored Drinks
- Juices (10% -100%)
- Sports/ Energy Drinks
- Tea
- Water

Confectionery, Sweet Biscuits & Snacks

- Cereal/ Muesli Bars
- Chocolate - Novelties, Bite Size and Hand Held Snacks
- Candy
- Sweet Biscuits/Cookies

Ambient/Shelf-Stable Food

- Baking/ Cooking Aids
- Bread
- Breakfast Style Cereals/ Pastries
- Cakes/ Gateaux
- Cooking/ Edible Oils
- Dairy/ Milk/ Cream/ Modifiers
- Dessert Sauces
- Desserts
- Dips/ Dressings/ Sauces
- Eggs
- Fillings/ Pastes/ Spreads
- Fish/ Shellfish/ Seafood
- Fruit/ Nuts
- Herbs/ Spices/ Salt/ Recipe Seasoning
- Meat/ Meat Meal Makers
- Noodles/ Pasta/ Rice/ Vegetable - Meal Makers
- Protein Based Meat Alternatives/ Meal Makers

Ambient/Shelf-Stable Food cont'd

- Complete Ready Meals
- Savory/ Neutral Biscuits/ Crackers
- Soup/ Bouillon/ Stock
- Sugar/ Sugar Substitutes/ Syrup/ Treacle
- Sweet Pastry/ Dough
- Vegetables/ Salad Vegetables

Frozen Food

- Baking/ Cooking Aids
- Bread
- Cakes/ Gateaux
- Cheese
- Dairy/ Milk/ Cream
- Dessert Sauces
- Desserts
- Dips/ Dressings/ Sauces
- Fish/ Shellfish/ Seafood
- Fruit
- Herbs/ Spices
- Ice
- Ice Cream/ Novelties
- Meal Makers
- Meat/ Poultry/ Game
- Complete Ready Meals
- Savory Pastry Based Prepared Foods
- Soup/ Bouillon/ Stock
- Sweet Pastry/ Dough
- Vegetables/ Salad Vegetables

Fresh/Refrigerated Food

- Baking/ Cooking Aids
- Biscuits
- Butter/ Margarine/ Edible Fats
- Cakes/ Gateaux
- Cheese
- Dairy/ Milk/ Cream
- Dessert Sauces
- Desserts
- Dips/ Dressings/ Sauces
- Eggs
- Savory Fillings/ Pastes/ Spreads
- Fish/ Shellfish/ Seafood
- Fruit/ Nuts
- Herbs/ Spices
- Meat/ Poultry/ Game
- Protein Based Meat Alternatives/ Meal Makers
- Meal Makers & Ready Meals Complete
- Salads
- Savory Pastry Based Prepared Foods
- Dipping Snacks
- Soup/ Bouillon/ Stock
- Sweet Pastry/ Dough
- Vegetables/ Salad Vegetables

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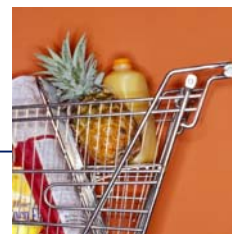
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Insights on Growth in Food and Beverages



Category Coverage

As mentioned above, since some categories either do not exist or are not measured in every market, we have noted in our category findings the number of countries included in the analysis. Where products were segmented into different categories across markets we have re-constructed the categories in order to have a more consistent view.

Coverage by country is dependent on the channels in which the categories are sold, as well as ACNielsen's coverage of those channels. Since local ACNielsen information was used in the study, categories most often purchased within grocery stores benefit from ACNielsen's strong coverage of grocery retailers. Generally, impulse purchases, such as purchases of carbonated drinks or candy bars from kiosks, bars, restaurants, vending machines or in some cases convenience stores and pharmacies are not included, making the data coverage for these categories considerably lower.

Periods Included

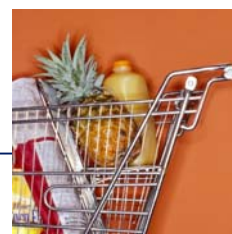
Information was collected for the years 1999, 2000, and 2001. Given the different reporting cycles across countries, the information ended with either the December or January time period each year.

Exchange Rates Used

To obtain a global perspective on a category, global aggregations were done by converting local currency to US dollars using a constant exchange rate across the three-year period (see below).

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Exchange Rates

Country	Currency	Exchange Rate (Per US\$)
Latin America		
Argentina	Argentine Peso	1.65
Brazil	Brazil Real	2.32
Central America	US Dollar	1.00
Chile	Chilean Peso	660.95
Colombia	Colombian Peso	2,295.00
Mexico	Mexican Peso	9.13
Puerto Rico	US Dollar	1.00
Asia Pacific		
Australia	Australian Dollar	1.97
China	China Renminbi	8.28
Hong Kong, China	Hong Kong Dollar	7.80
India	Indian Rupee	48.15
Indonesia	Indonesian Rupiah	10,395.04
Japan	Japanese Yen	131.55
Korea, Rep. (South Korea)	South Korean Wong	1,324.00
Malaysia	Malaysian Ringgit	3.80
New Zealand	New Zealand Dollar	2.41
Philippines	Philippines Peso	51.45
Singapore	Singapore Dollar	1.85
Thailand	Thai Baht	44.20
North America		
Canada	Canadian Dollar	1.58
United States	US Dollar	1.00
Europe		
Austria	Euro	1.13
Belgium	Euro	1.13
Denmark	Danish Krone	8.42
Finland	Euro	1.13
France	Euro	1.13
Germany	Euro	1.13
Great Britain	British Pound	0.69
Greece	Euro	1.13
Ireland	Euro	1.13
Italy	Euro	1.13
Netherlands	Euro	1.13
Norway	Norwegian Krone	9.04
Portugal	Euro	1.13
Spain	Spanish Peseta	188.40
Sweden	Swedish Krona	10.72
Switzerland	Swiss Franc	1.68
Turkey	Turkish Lira	1,455,411.93
Emerging Markets		
Czech Republic	Czech Koruna	36.29
Egypt, Arab Rep.	Egyptian Pound	4.54
Hungary	Hungarian Forint	277.91
Poland	Polish Zloty	3.99
Russian Federation	Russian Ruble	30.34
Saudi Arabia	Saudi Riyal	3.75
South Africa	South African Rand	12.02
Ukraine	Ukraine Hryvna	5.29
United Arab Emirates	Arab Emirates	3.67

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