

WILLIAMS&MARSHALL STRATEGY

GLOBAL MARKET INSIGHTS

Demo version of the report

France: Crispbread Market

October 2017

Market research

Report overview

This report presents a strategic analysis of the crispbread market in France and a forecast for its development in the next five years. It provides a comprehensive overview of the market, its dynamics, structure, characteristics, main players, growth and demand drivers, etc.

The purpose of the report is to describe the state of the crispbread market in France, to present actual and retrospective information about the volumes, dynamics, structure and characteristics of production, imports, exports and consumption and to build a forecast for the market in the medium term. In addition, the report presents an elaborate analysis of the main market participants, the price fluctuations, growth and demand drivers of the market and all other factors, influencing its development.

This research report has been prepared using the unique WMStrategy's methodology, including a blend of qualitative and quantitative data. The information comes from official sources and insights from market experts (representatives of the main market participants), gathered by semi-structured interviews.

The report on the crispbread market in France includes:

- Analysis and forecast for the economy and demographics of Europe;
- Analysis and forecast for development of the market volume (market size), value and dynamics;
- Market breakdown (by origin, by product types, etc.) in both volume and value terms;
- Volume, dynamics and analysis of domestic production (past, current and future);
- Analysis of price levels (wholesale, retail, distributors, etc.) and their dynamics (past, current and future);
- Volume, dynamics and analysis of imports (past, current and future);
- Volume, dynamics and analysis of exports (past, current and future);
- Volume, dynamics and analysis of consumption (past, current and future);
- Value chain analysis and structure of price formation;
- Analysis of the factors, influencing the market development (market growth drivers, restraints, recent state programs, etc.);
- Characteristics of the main market participants (manufacturers, distributors, wholesalers, retailers, importers, exporters, Governmental structures, etc.) and the competitive landscape;
- Main distribution channels for the retail sales of crispbread in France;
- Analysis and forecast of the trends and levels of supply and demand on the market;

- Analysis of the major trade flows;
- Forecast for market development in the medium term (including three possible scenarios for development).

Brief overview of the used methodology:

- Analysis of official statistical information;
- Semi structured interviews with market experts;
- Semi structured interviews with corporate clients of the market;
- Analysis of information, received from the main market participants;
- Analysis of secondary information from official sources;
- WMStrategy's own methodology.

The report contains information on the following products:

- Crispbread:
 - Single-grain crispbread;
 - Whole-grain crispbread;
 - Multi-grain crispbread;
 - Gluten free crispbread.

The report covers the following countries:

- France.

The report covers the following companies:

- Producers and traders:
 - The Kraft Heinz Company
 - ConAgra Foods
 - General mills
 - Orkla Foods
 - Yildiz Holding
 - Mondelez International
 - Bakkersland Groep B.V.
 - Barilla Holding Societa per Azioni
 - Warburtons Ltd
 - Oy Karl Fazer Ab
 - Pagen AB
 - Vaasan Oy
 - Associated British Foods Plc

- La Lorraine NV
- Biscottes Auga Picard SA
- Groupe Limagrain Holdings S.A.
- IBIS GmbH
- Grupo Bimbo S.A. de C.V.
- Top Bakkers B.V.
- Jordans and Ryvita Co Ltd
- Chaber S.S.
- Roma Foods Products
- Peter's Yard
- Gutena Nahrungsmittel GmbH
- GG Bran Crispbread
- Retailers:
 - Aldi, ALDI Einkauf GmbH & Co. OHG
 - Auchan, Auchan Group
 - Casino, Casino Group
 - Carrefour, Carrefour S.A.
 - Colruyt, Colruyt Group
 - Cora, Louis Delhaize Group
 - Lidl, Schwarz Group
 - Intermarche, Les Mousquetaires Group
 - Rallye, Casino Group
 - Migros, Migros-Genossenschafts-Bund
 - Geant, Casino Group

The list of companies, covered in the report can be amended and updated, based on your exact requirements!

This report will allow you to:

- Quickly and cost-effectively get a strategic analysis and gain competitive intelligence about the market;
- Track market data, including size, value, segmentation, forecasts, dynamics and structure – past, present and future;
- Explore and identify new market opportunities within the market;
- Track and identify key market trends, opportunities and threats and key drivers behind recent market changes;
- Strategically assess market growth potential, demand drivers and restraints on the market;
- Evaluate the key macroeconomic and demographic indicators to get insight into the general trends within the economy;

- See how the market performed in the past (over the last 5 years) and how it will perform in the future (in the next 5 years);
- Get acquainted with the leading companies on the market and their strategic position;
- Evaluate how diversified the market is in terms of competitive intensity, fragmentation and environment and understand competitive threats;
- Empower your marketing, branding, strategy and market development, consumption and supply functions with useful and actionable market insights;
- Build your investment strategy by assessing market attractiveness or company attractiveness;
- Build your own market entry or market expansion strategy or evaluate your current strategy;
- Add value to pitches and presentations by using official and accurate data and calculations.

This report is 75% ready and when complete will consist of more than 100 pages. The report will be updated as of the current month of purchase. It can be amended based on your specific requirements in order to meet your individual objectives and information needs.

If you are interested in the crispbread market in France, this research report will provide you with a strategic analysis of the market, its recent and future development. In addition, the report will save you time and money while presenting you all the necessary information and actionable insights, empowering you to make informed decisions and move your business forward!

Research methodology

The report on the French crispbread market uses the unique WMStrategy's research methodology that combines quantitative and qualitative analysis.

1. Analysis of official statistical information

This report includes analysis of official statistical information from different public and private sources. The information is used for the interpretation and analysis of data on the volume and dynamics of different quantitative indicators. In the same way, the information is used as basis for building forecasts for the dynamics of the quantitative indicators for the next few years. The exact list of used sources of official information is available in the full report!

2. Analysis of information, received from the main market participants

The collection and analysis of information, received from the main market participants is done mainly to understand their competitive positions on the market, to define and assess how different pricing and promotional strategies are utilized on the market and what competitive advantage each of them gives. This information is also used to analyze the assortment and brand presence on the market. The information, received from the main market participants includes company presentations, annual reports, price lists, promotional materials, proposals, etc.

3. Analysis of secondary information from official sources

The analysis of secondary information from official sources is used to make the picture of the market complete and full. The data is also used to verify the quantitative analysis and to enrich the qualitative one. Such information includes data from industry portals and publications, trade associations, media agencies, articles and reviews, marketing agencies, commercial databases, WMStrategy's own research studies, and more.

4. Semi structured interviews with market experts

Collection and analysis of qualitative information is used to explain different trends, growth drivers, volatility, threats and opportunities of the market. The collection of qualitative information is done through semi structured interviews with market experts. As market experts are considered representatives of the main market participants – manufacturers, distributors, wholesalers, retailers, importers, exporters, unions, professional associations and special publications, whose work is directly related to this particular market on a daily

basis. The format of the semi structured interviews allows us not only to cover the main questions we need to ask in order to understand the logic behind the market, but also to get new insights and to allow new ideas and factors to come into the picture. During the semi structured interviews, the market experts are asked about their views on the future of the market, which are taken into consideration while preparing our forecasts for development. The exact list of interviewed experts is available in the full report or upon request!

5. Semi structured interviews with corporate clients of the market

Another way of looking into the specific market is through the point of view of the corporate clients. In this phase of the research, we are using semi structured interviews to understand the perspective of the high-volume clients on the market. This allows for unmatched wide and deep industry understanding.

6. WMStrategy's own methodology

The own methodology of WMStrategy can be found in every step of preparing our research studies from the methodology through the processes of collecting and analyzing information to drawing conclusions from it.

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About us

This report is 75% ready and is in completion stage. The structure and the contents of this report can be amended based on your specific requirements and goals. The report will be updated as of the current month of purchase. The final version of the research report will be presented up to 5 working days after your order. If you purchase the Corporate License, you will get an Excel sheet with all the quantitative information in up to 2 working days after your purchase. Feel free to contact us for more information!

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2. Executive summary

The French crispbread market showed ... dynamics in physical terms in the period 2012-2016. In 2012, it was equal to X thousand tons. In 2012, the indicator ... by X%, after which followed three consecutive years of ... It happened at rates of X%, X% and X%, respectively. So, in 2016, the market volume reached ... for the period at ... thousand tons, which was an overall ... for the period. In the next few years, experts believe that the market will continue ... at rates of X% per year.

In value terms, the crispbread market in France showed ... dynamics to the same indicator in volume terms. In 2012, it was equal to X billion EUR...

...

Table 1 Key indicators on the French crispbread market in 2012-2016

Indicators	2012	2013	2014	2015	2016
Market volume and value in France					
in tons	X	X	6,267	X	X
in 000's of EUR	X	X	X	X	X
Volume and value of production in France					
in tons	X	X	X	X	X
in 000's of EUR	X	X	X	X	X
Volume and value of imports to France					
in tons	X	X	X	X	X
in 000's of EUR	X	14,857	X	X	X
Volume and value of the French exports					
in tons	X	X	X	X	X
in 000's of EUR	X	X	X	X	X
Share of domestically produced goods on the market, in volume terms	X%	X%	X%	X%	X%
Share of foreign products on the market, in volume terms	X%	X%	X%	X%	X%
Average prices on the domestic market					
Average producer prices, in EUR/ton	X	X	X	X	X
Average retail prices, in EUR/kg	X	X	X	X	X

Source: Data (Official sources, Expert opinion, WMStrategy calculations), Analysis (WMStrategy)

6. Overview and analysis of the crispbread market in France

6.1. Volume, value and dynamics of the crispbread market in France in 2012-2016

The French crispbread market showed ... dynamics in physical terms. In, 2012 was equal to ... tons. In the next few years, it ...

Table 2 Volume and dynamics of the crispbread market in France in 2012-2016, in tons and in %

Year	Market volume, in tons	Dynamics, in %
2012	X	X%
2013	X	X%
2014	6,267	X%
2015	X	X%
2016	X	X%

Source: Data (Official sources, Expert opinion, WMStrategy calculations), Analysis (WMStrategy)

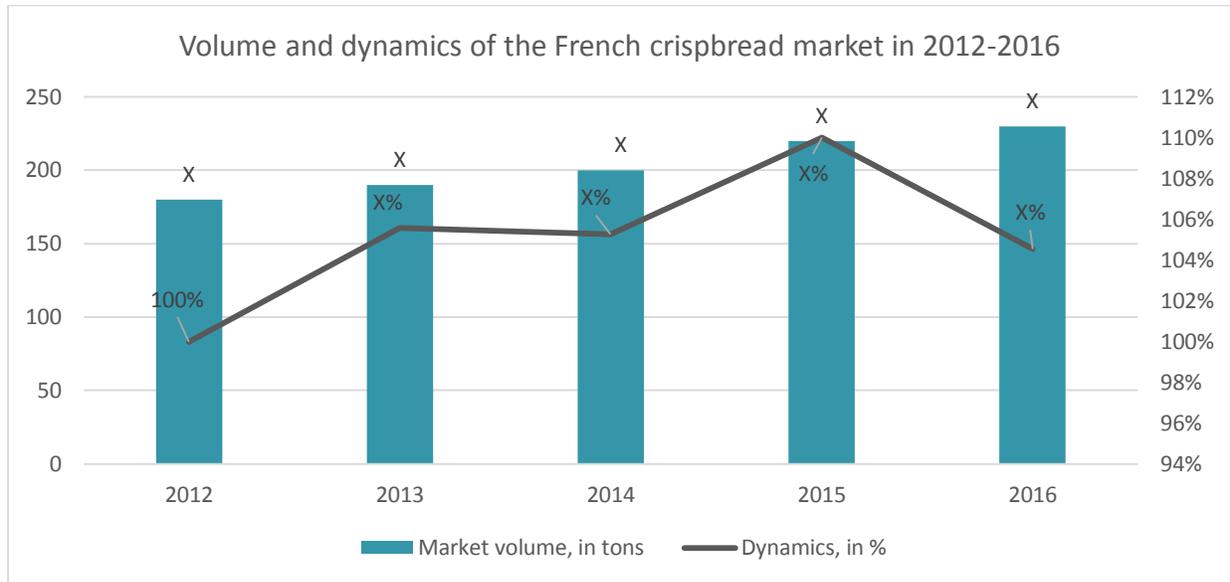


Fig. 1 Volume and dynamics of the crispbread market in France in 2012-2016, in tons and in %¹

Source: Data (Official sources, Expert opinion, WMStrategy calculations), Analysis (WMStrategy)

...

¹ Please, bear in mind that the figures, presented in this demo version are for illustrative purposes only and might differ from the real figures you will get by purchasing the full report!

6.3. Structure of the crispbread market in France by origin

During the whole analyzed period, the market was dominated by products of ... origin in both volume and value terms. In physical ones, the domestically produced products accounted for X%-X% of the market in 2012-2016. The market structure fluctuated a bit throughout the years, but showed similar dynamics in value terms as well. The share of domestic crispbread in value terms was in the range of X%-X%. Experts believe that this structure will remain at ... levels in the next few years. However, ...

...

Table 3 Structure of the crispbread market in France by origin in 2012-2016, in tons

Year	Market volume, in tons	Domestically produced products, in tons	Foreign products, in tons
2012	X	X	X
2013	X	X	X
2014	6,267	X	X
2015	X	X	X
2016	X	X	X

Source: Data (Official sources, Expert opinion, WMStrategy calculations), Analysis (WMStrategy)

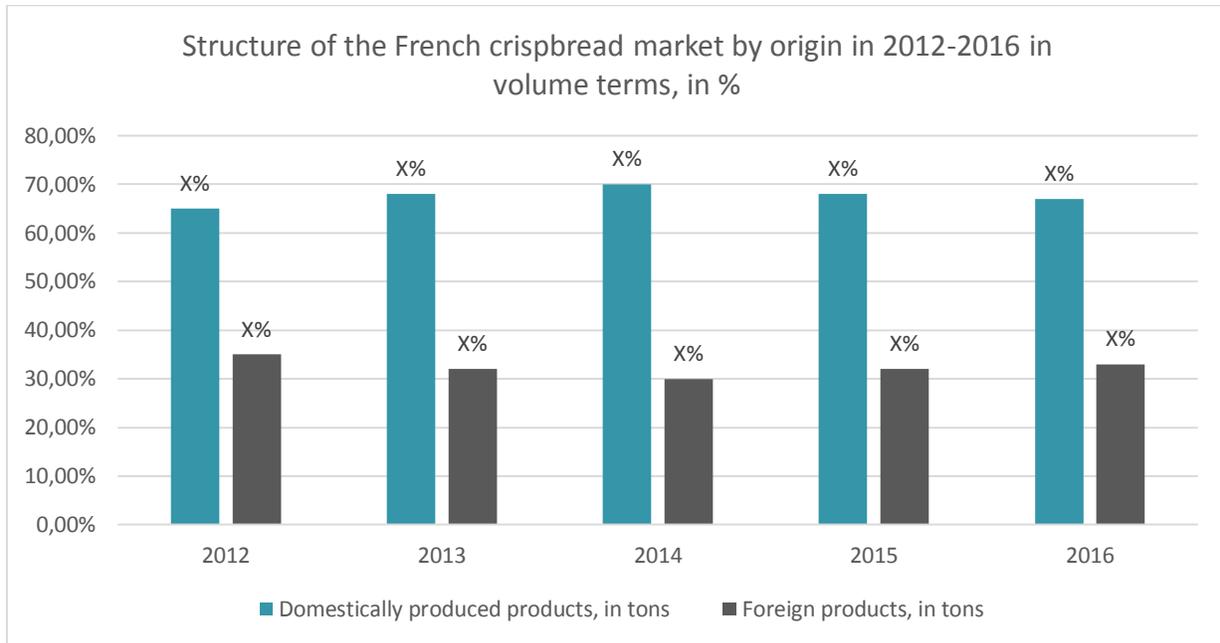


Fig. 2 Structure of the crispbread market in France by origin in 2012-2016 in volume terms, in %²

Source: Data (Official sources, Expert opinion, WMStrategy calculations), Analysis (WMStrategy)

² Please, bear in mind that the figures, presented in this demo version are for illustrative purposes only and might differ from the real figures you will get by purchasing the full report!

6.4. Key recent trends on the crispbread market in France

From the point of view of consumers, there are a number of substitutes for commercially available crispbread. These include different types of fresh breads and similar products, crackers and savory snacks, savory biscuits and even confectionery. Retailers, aiming to meet consumer demand, will tend to stock all kinds of substitutes. From the retailer's point of view, they may offer benefits, such as ... (e.g. premium-priced breads), ... and Switching costs are not significant. However, most food retailers are likely to ...

Table 4 Structure of the French crispbread market by product categories by main product segment in brand value in 2016 in value terms, in % to the total

Product category	Share in 2016 in value terms, in %
Single-grain crispbread	X%
Whole-grain crispbread	X%
Multi-grain crispbread	X%
Gluten free crispbread	X%
Total	100.00%

Source: Data (Official sources, Expert opinion, WMStrategy calculations), Analysis (WMStrategy)

...

Crispbread is a commodity product and as such, most of its sales to final consumers happen in the retail network. In 2016, about X% of them happened through supermarkets and hypermarkets. These are the places that offer the largest variety of crispbread flavors and consumers usually go there to purchase many food items, not specifically for crispbread. They were followed by independent retailers, where happened about X% of the crispbread retail sales in the last year. The convenience stores contributed about ...

Table 5 Main trade channels for crispbread retail distribution in France in 2016 in value terms, in % to the total

Trade channel	Share of total sales in 2016 in value terms, in %
Supermarkets and hypermarkets	X%
Independent retailers	X%
Convenience stores	X%
Specialist retailers	X%
Others	X%
Total	100.00%

Source: Data (Official sources, Expert opinion, WMStrategy calculations), Analysis (WMStrategy)

...

Packaging is an important input in this market and some market players may enter into long-term contracts with their suppliers, which increases supplier power. It may be possible to find substitutes for some minor ingredients such as flavorings in the production of crispbread but there are no satisfactory substitutes for major ingredients like flour, salt and sugar. This also tends to strengthen supplier power, which as an overall can be considered ...

...

6.5. Competitive landscape of the market

...

The European crispbread market is not fragmented with the top four players holding over less than X% of the total market by value. Its most significant players include large, well-known international companies like Kraft Heinz, ConAgra, General Mills and Mondelez, as well as smaller competitors, i.e. Warburtons, Bakkersland Groep and Vaasan Oy. There are numerous smaller companies on the market and there is production of crispbread happening in more than ...

...

As regards producing companies, the competitive landscape is not very easy to change as the market entry barriers are considerably high in most of the analyzed European markets. These require choosing ...

...

6.6. Key drivers and restraints for the market development in the medium term

...

Another important driver for the development of the crispbread market in the medium term is connected with the busy lifestyles, the increasing influence of western culture and the rising health awareness. The busy lifestyles mean that people have less and less time to cook at home and are looking for quick way to prepare tasty and nutritional meals. At the same time, the health awareness among the consumers is growing rapidly in the last few years. The main producing companies and thus coming up with new production processes, new product types and even new ...

...

7. Overview and analysis of the domestic production of crispbread in France

7.1. Volume, value and dynamics of the domestic production of crispbread in France in 2012-2016

As an overall, the French production of crispbread in physical terms showed ... dynamics in the period 2012-2016. In 2012, in France were produced X thousand tons of the product. In 2013, the indicator ... by ...%, which was followed by ... years of It happened at rates of ...% and ...%, respectively. In 2016, in France were produced X thousand tons, which was a total ... of ..., compared to 2012. Experts forecast that in the next few years, the French production will ... at ... rates of ...% per year.

...

Table 6 Volume and dynamics of the domestic production of crispbread in France in 2012-2016, in tons and in %

Year	Production volume, in tons	Dynamics, in %
2012	X	X%
2013	X	X%
2014	X	X%
2015	X	X%
2016	X	X%

Source: Data (Official sources, Expert opinion, WMStrategy calculations), Analysis (WMStrategy)

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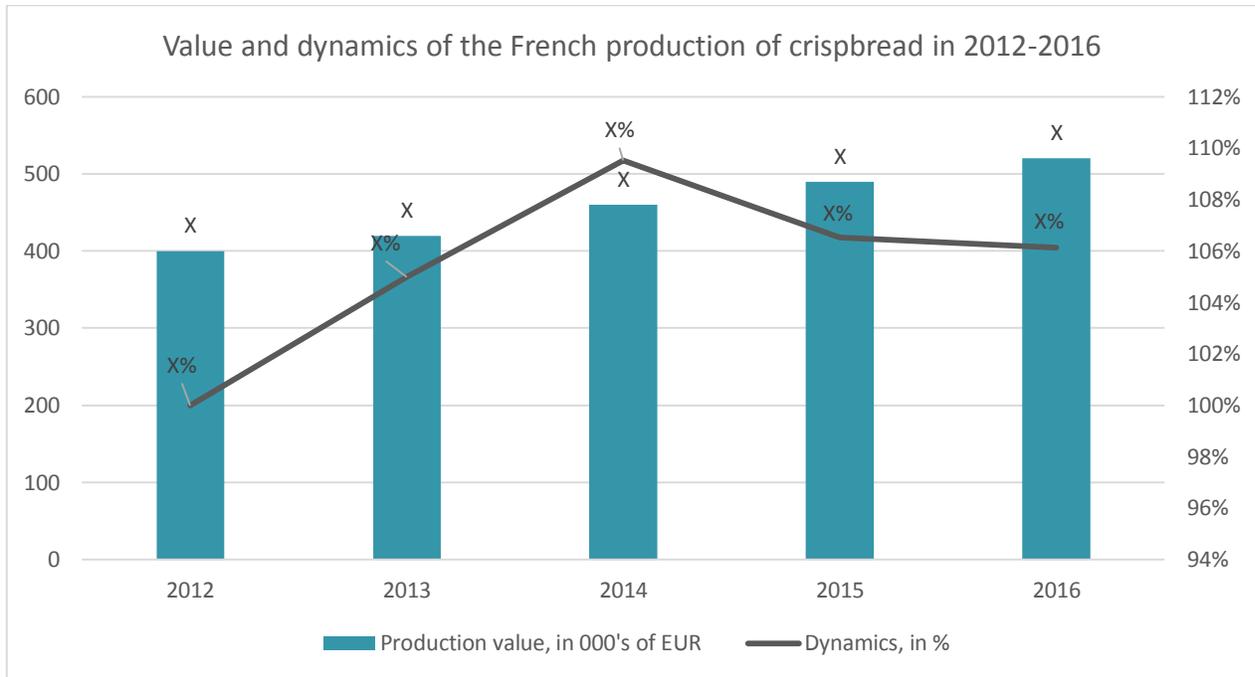


Fig. 3 Value and dynamics of the domestic production of crispbread in France in 2012-2016, in thousands of EUR and in %³

Source: Data (Official sources, Expert opinion, WMStrategy calculations), Analysis (WMStrategy)

...

³ Please, bear in mind that the figures, presented in this demo version are for illustrative purposes only and might differ from the real figures you will get by purchasing the full report!

7.3. Characteristics of the main companies, producers and distributors of crispbread in France

...

There are a number of large European companies, which are engaged in crispbread production in the region. Some of the leading of them are profiled in this sub-chapter. These specific companies have been included due to the fact that they have been referred to as leading by the interviewed market experts, industry media, etc. However, the list does not claim to be complete and there are other important companies in Europe as well. The companies are ...

...

7.3.1. The Kraft Heinz Company

The Kraft Heinz Company is an ...

8. Characteristics and analysis of the prices of crispbread in France

...

8.3. Characteristics of the producer prices of crispbread in France in 2012-2016

...

The average producer prices of crispbread in France in the period 2012-2016 showed ... dynamics. In 2012, one ton of crispbread, purchased directly from the producer cost about ... EUR in France. In the next two years, the indicator ... to reach its highest value for the period at ... EUR per ton in ... After this came ... rates of ...% and ...%, respectively. As a result, in 2016, the average producer price reached ... EUR per ton, which was an overall ... of ...% for the period. Experts expect that the average producer prices will ... in the next five years at ... rates of ...% per year.

Table 7 Volume and dynamics of the average producer prices of crispbread in France in 2012-2016, in EUR per ton and in %

Year	Average producer price, in EUR/ton	Dynamics, in %
2011	X	X%
2012	X	X%
2013	X	X%
2014	X	X%
2015	X	X%

Source: Data (Official sources, Expert opinion, WMStrategy calculations), Analysis (WMStrategy)

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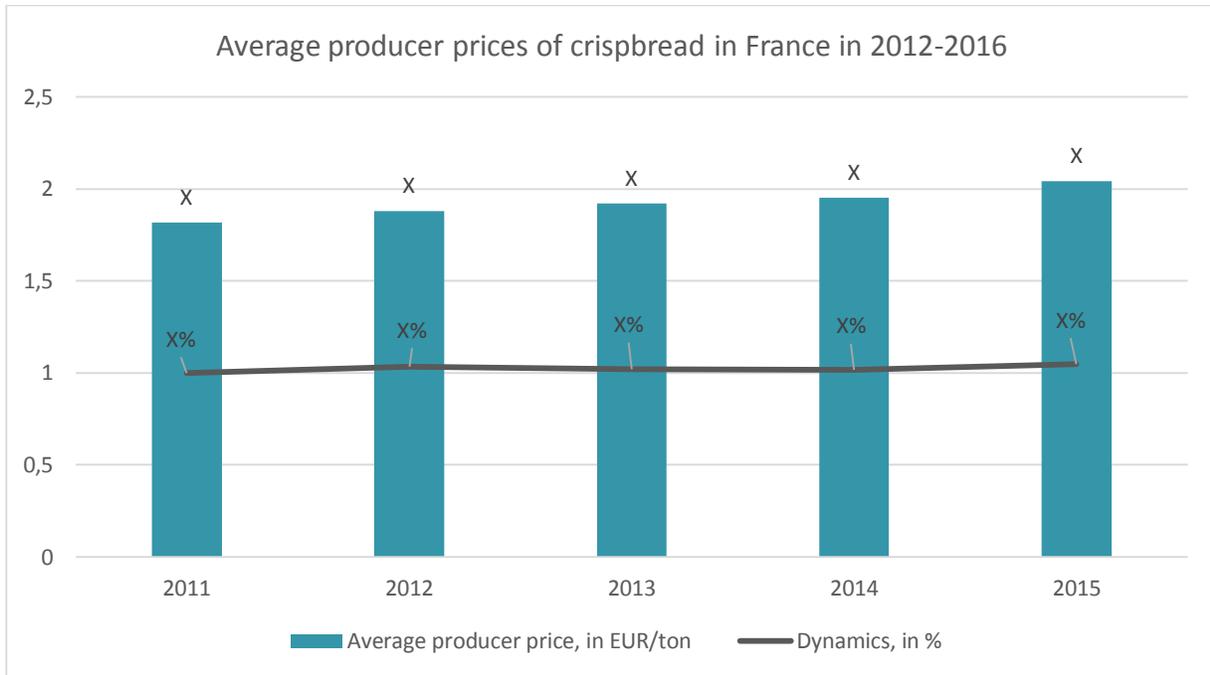


Fig. 4 Volume and dynamics of the average producer prices of crispbread in France in 2012-2016, in EUR per ton⁴

Source: Data (Official sources, Expert opinion, WMStrategy calculations), Analysis (WMStrategy)

...

⁴ Please, bear in mind that the figures, presented in this demo version are for illustrative purposes only and might differ from the real figures you will get by purchasing the full report!

10. Overview and analysis of the imports of crispbread to the French market

...

10.2. Major trade inflows of crispbread imports to France

...

In 2016, in volume terms, the main share of imports belonged to It was then followed by ... with ... thousand tons (...%) and ... with ... thousand tons (...%). The fourth and fifth place, respectively, were taken by ... and ... with ... (...%) and ... thousand tons (...%). In value terms, the three leading countries were - ..., ... and ... with imported products, equal to ... (...% of the total) , ... (...%) and ... EUR (...%).

Table 8 Main countries, exporting crispbread to France in 2012-2016, in thousands of EUR and in %

Exporting country	Import value in 2012, in 000's of EUR	Import value in 2013, in 000's of EUR	Import value in 2014, in 000's of EUR	Import value in 2015, in 000's of EUR	Import value in 2016, in 000's of EUR	CAGR 2012-2016	Share in 2016, in %
Country A	X	X	X	X	X	X%	X%
Country B	X	X	X	X	X	X%	X%
Country C	X	X	X	X	X	X%	X%
Country D	X	X	X	X	X	X%	X%
Country E	X	X	X	X	X	X%	X%
Country F	X	X	X	X	X	X%	X%
Country G	X	X	X	X	X	X%	X%
Country H	X	X	X	X	X	X%	X%
Country I	X	X	X	X	X	X%	X%
...	X	X	X	X	X	X%	X%
Other countries	X	X	X	X	X	X%	X%
Total	X	X	X	X	X	X%	X%

Source: Data (Official sources, Expert opinion, WMStrategy calculations), Analysis (WMStrategy)

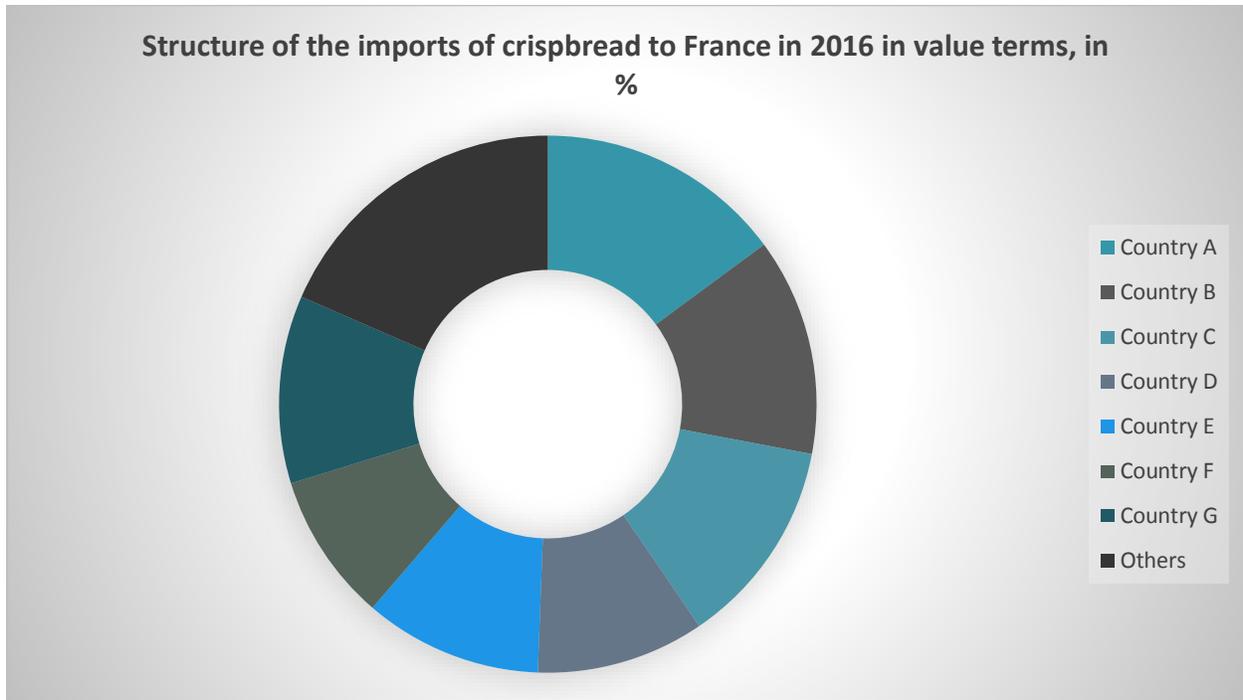


Fig. 5 Main countries, exporting crispbread to France in 2016 in value terms, in %⁵

Source: Data (Official sources, Expert opinion, WMStrategy calculations), Analysis (WMStrategy)

...

⁵ Please, bear in mind that the figures, presented in this demo version are for illustrative purposes only and might differ from the real figures you will get by purchasing the full report!

12. Characteristics of the consumption of crispbread in France

12.1. Volume, value and dynamics of the consumption of crispbread in France in 2012-2016

...

The consumption volume of crispbread in France in 2012 was ... thousand tons, which were valued at ... billion EUR in producer prices. During the analyzed period, the consumption in both volume and value terms showed mixed dynamics...

...

Table 9 Volume, value and dynamics of the consumption of crispbread in France in 2012-2016, in tons, thousands of EUR and in %

Year	Market volume, in tons	Market value, in 000's of EUR	Inventory levels	Consumption, in tons	Consumption, in 000's of EUR
2012	X	X	X%	X	X
2013	X	X	X%	X	X
2014	6,267	X	X%	X	X
2015	X	X	X%	X	X
2016	X	X	X%	X	X

Source: Data (Official sources, Expert opinion, WMStrategy calculations), Analysis (WMStrategy)

...

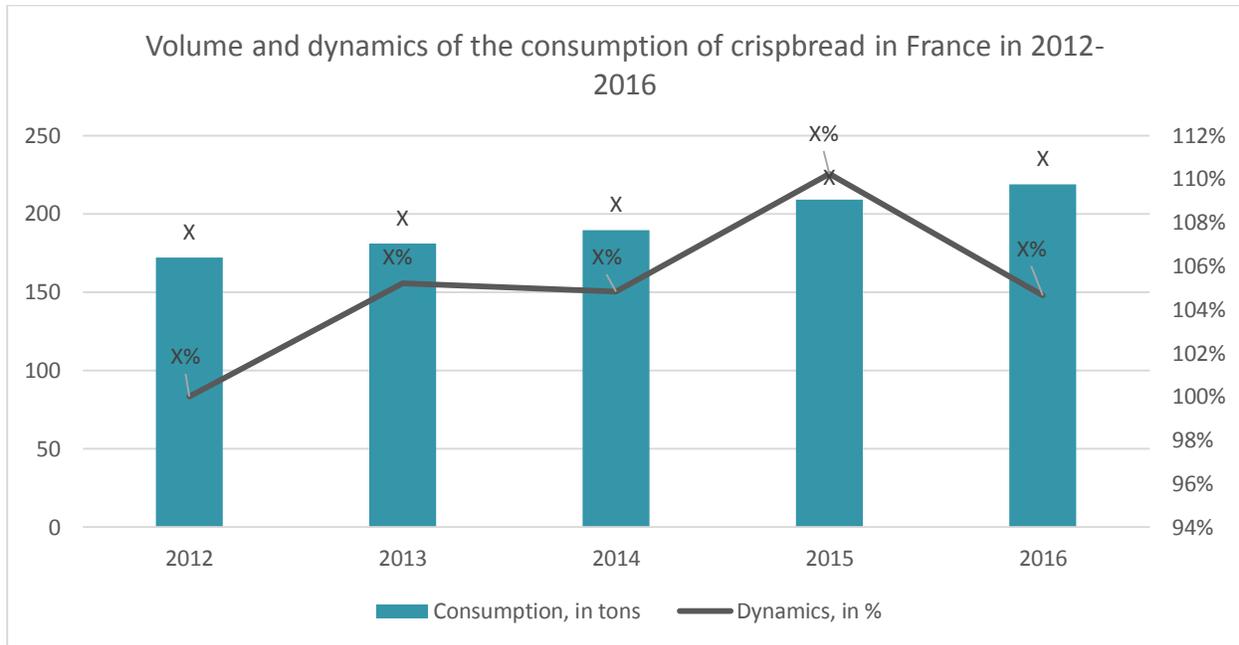


Fig. 6 Volume and dynamics of the consumption of crispbread in France in 2012-2016, in tons and in %⁶

Source: Data (Official sources, Expert opinion, WMStrategy calculations), Analysis (WMStrategy)

...

⁶ Please, bear in mind that the figures, presented in this demo version are for illustrative purposes only and might differ from the real figures you will get by purchasing the full report!

12.2. Volume, value and dynamics of the per capita consumption of crispbread in France in 2012-2016

...

... The French average consumption in 2012 was ... kilograms per capita, which was equal to ... EUR per capita. In the next five years, the volume of per capita consumption in volume terms ... at CAGR of ...% per year to reach ... kilograms per capita, while the one in value terms ... at CAGR of ...% per annum and reached ... EUR per person...

...

Table 10 Volume, value and dynamics of the per capita consumption of crispbread in France in 2012-2016, in kilograms per capita, EUR per capita and in %

Year	Consumption per capita, in kg/capita	Dynamics, in %	Consumption per capita, in EUR/capita	Dynamics, in %
2012	X	X%	X	X%
2013	X	X%	X	X%
2014	X	X%	X	X%
2015	X	X%	X	X%
2016	X	X%	X	X%

Source: Data (Official sources, Expert opinion, WMStrategy calculations), Analysis (WMStrategy)

...

12.3. Balance between supply and demand on the crispbread market in France in 2012-2016

...

Due to the ... of domestic demand, the local balance between supply and demand in physical terms was ... with domestic supply being able to cover about X%-X% of the domestic demand in the last five years. In value terms, the situation was ... but had ... dynamics due to the ... In value terms, the balance between domestic supply and domestic demand was also ... with domestic supply being able to cover about X%-X% of the local demand in 2012-2016. It should be mentioned that a large part of the French production is exported but mostly to ... countries. Experts forecast that the balance in both volume and value terms will remain ... in the next few years and the difference between the

...

Table 11 Balance between domestic supply and domestic demand on the crispbread market in France in 2012-2016, in tons and in %

Year	Volume of domestic supply, in tons	Volume of domestic demand, in tons	Balance, in tons	Supply, in % to the total demand
2012	X	X	X	X%
2013	X	X	X	X%
2014	X	X	X	X%
2015	X	X	X	X%
2016	X	X	X	X%

Source: Data (Official sources, Expert opinion, WMStrategy calculations), Analysis (WMStrategy)

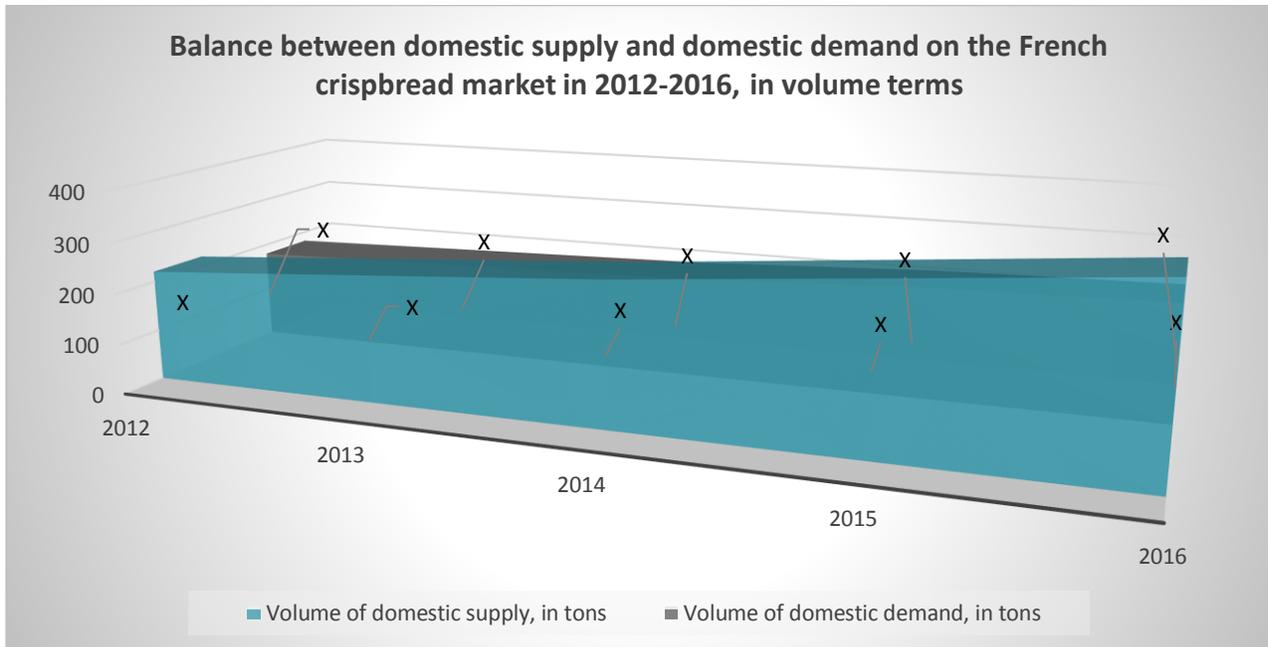


Fig. 7 Balance between domestic supply and domestic demand on the crispbread market in France in 2012-2016, in tons⁷

Source: Data (Official sources, Expert opinion, WMStrategy calculations), Analysis (WMStrategy)

⁷ Please, bear in mind that the figures, presented in this demo version are for illustrative purposes only and might differ from the real figures you will get by purchasing the full report!

12.4. Forecast for development of the crispbread market in France in 2017-2022

...

In the last five years, the crispbread market in France was dominated by ... and this trend will continue in the medium term. Due to the ..., the market will show ... in the period until 2022. Of course, this will happen if the overall French economy is able to achieve ... of ...% per year and....

...

Under the base scenario for development, the French economy will show ... rates of about ...% per year until 2022.... In this scenario, the annual market ... rate for the period will be about ...% per year, which means that the market volume in 2022 will reach ... thousand tons or ... billion EUR.

Table 12 Volume, value and dynamics of the crispbread market in France in 2012-2016 and forecast for its development in 2017-2022 (under the framework of the base scenario), in tons, thousands of EUR and in %

Year	Market volume, in tons	Dynamics, in %	Market value, in 000's of EUR	Dynamics, in %
2012	X	X%	X	X%
2013	X	X%	X	X%
2014	6,267	X%	X	X%
2015	X	X%	X	X%
2016	X	X%	X	X%
2017F	X	X%	X	X%
2018F	X	X%	X	X%
2019F	X	X%	X	X%
2020F	X	X%	X	X%
2021F	X	X%	X	X%
2022F	X	X%	X	X%

Source: Data (Official sources, Expert opinion, WMStrategy calculations), Analysis (WMStrategy)

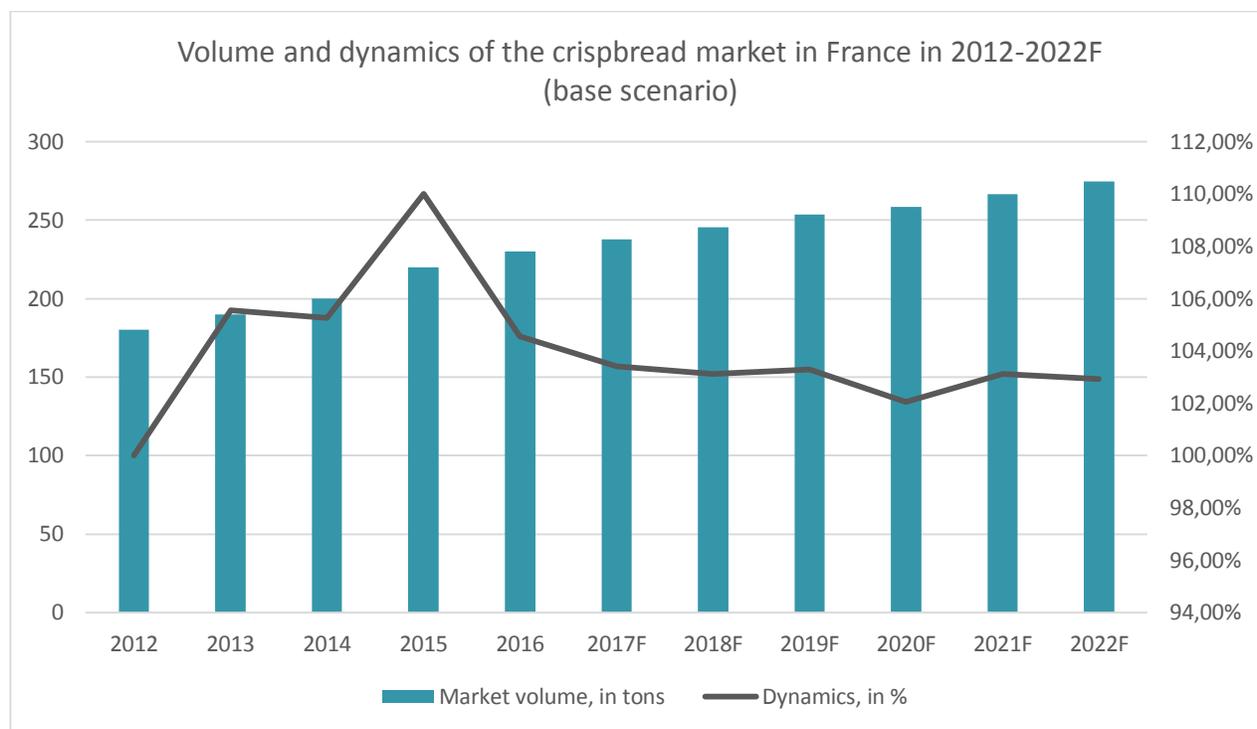


Fig. 8 Volume and dynamics of the crispbread market in France in 2012-2016 and forecast for its development in 2017-2022 (under the framework of the base scenario), in tons and in %⁸

Source: Data (Official sources, Expert opinion, WMStrategy calculations), Analysis (WMStrategy)

⁸ Please, bear in mind that the figures, presented in this demo version are for illustrative purposes only and might differ from the real figures you will get by purchasing the full report!

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