

FRUIT PREPARATIONS

Prepared by:

CPL Business Consultants

Innovation Centre, Milton Park, Abingdon, Oxfordshire, OX14 4RY
Tel: +44 1865 257 057, info@cplconsult.com, www.cplconsult.com

Dr Esther Hunter
Dr S G Lisansky
Dr Rachel Adams

STRATEGIES TO GROW YOUR BUSINESS

TABLE OF CONTENTS

OBJECTIVE	1
METHOD	1
FINDINGS & CONCLUSIONS	2
FRUIT PREPARATION AND DAIRY MARKETS.....	2
FRUIT PREPARATION AND DAIRY PLAYERS/PRODUCTS	4
SUCCESS FACTORS	6
MARKET SIZE	7
VOLUME	7
PRICE.....	9
GROWTH.....	9
SECTORS.....	10
PROFITABILITY	10
THE DAIRY PRODUCTS MARKET	12
COUNTRIES	13
<i>UK</i>	13
<i>Germany</i>	15
<i>Holland</i>	15
<i>Finland</i>	15
<i>France</i>	15
KEY DAIRY COMPANIES	15
TRENDS	16
MARKET DRIVERS	18
COMMODITISATION	18
GROWTH AND TRENDS	19
ROLE OF R&D AND INNOVATION	19
INDUSTRY STRUCTURE	19
TYPES OF PLAYER AS COMPANY BUSINESS MODELS.....	19
<i>Customer Focused</i>	19
<i>One Stop Shop</i>	20
<i>Fruit Specialists</i>	20
<i>Self Sufficient</i>	21
<i>Others</i>	21
SUPPLIER OVERVIEW	22
<i>29 Companies</i>	
SUCCESS CRITERIA	66
KEY SUCCESS FACTORS	66
KNOWLEDGE OF FRUIT	66
TECHNICAL CAPABILITIES.....	67
INNOVATION.....	67
REPUTATION.....	68
BARRIERS TO ENTRY	69
FRUIT.....	69
CAPITAL	72
MERGERS & ACQUISITIONS IN FRUIT PREPARATIONS.....	72
CHANNELS OF DISTRIBUTION AND SUPPLIER TRENDS	74
CONTACTS	74
11 FRUIT PREPARATION MANUFACTURERS	74
3 FRUIT PREPARATION IN HOUSE PRODUCERS.....	90
6 FRUIT PREPARATION USERS DAIRY & ICE CREAM	92

2 FRUIT PREPARATION USERS BAKERY 103

TABLES

TABLE 1 VOLUME OF EUROPEAN FRUIT PREPARATION DERIVED FROM EUROPEAN CHILLED DESSERT DATA, 7
 TABLE 2 VOLUME OF UK & GERMAN FRUIT PREPARATION DERIVED FROM EUROPEAN CHILLED DESSERT DATA, 8
 TABLE 3 VOLUME OF UK FRUIT PREPARATION DERIVED FROM YOGHURT VALUE 8
 TABLE 4 PRICES OF RETAIL YOGHURT WITH FRUIT IN THE UK 14
 TABLE 5 FRUIT PREPARATIONS MANUFACTURERS 24
 TABLE 6 KEY FIGURES 37
 TABLE 7 15 YEAR REVIEW 49

FIGURES

FIGURE 1 COMPANY 1 SALES BY COUNTRY 59