



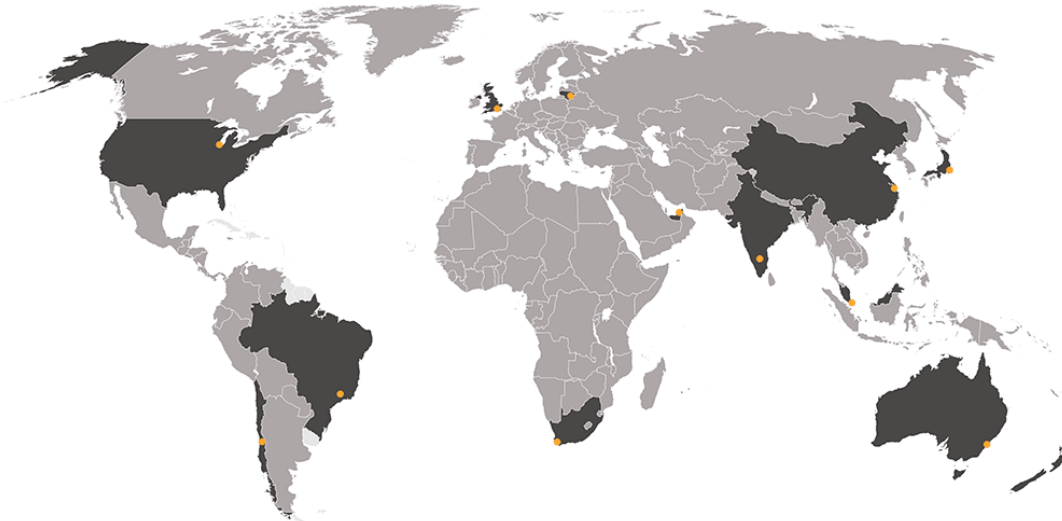
# **PASSPORT: YOUR GATEWAY TO GLOBAL STRATEGIC INTELLIGENCE**

INFORUM 2015

MAY 2015

# Euromonitor International

- A global strategic market intelligence source for 40+ years
- Helping clients make informed strategic decisions
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- Annually-updated syndicated research in **80 countries**
- Customised ad-hoc projects conducted globally
- 1000 analysts in 80 countries
- Regional research hubs and industry specialist **support teams**



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Chicago	
Singapore	
Shanghai	
Dubai	
Vilnius	
Cape Town	
Santiago	
Tokyo	
Sydney	
Bangalore	
Sao Paulo	







**Passport**

# Passport content


## Consumer Products

 Alcoholic Drinks	 Home Care
 Apparel	 Hot Drinks
 Automotive	 Luxury Goods
 Beauty and Personal Care	 Packaged Food
 Consumer Appliances	 Pet Care
 Consumer Electronics	 Personal Accessories
 Consumer Health	 Soft Drinks
 Eyewear	 Tissue and Hygiene
 Fresh Food	 Tobacco
 Health and Wellness	 Toys and Games
 Home and Garden	

## Services

 Consumer Finance
 Consumer Foodservice
 Retailing
 Travel and Tourism

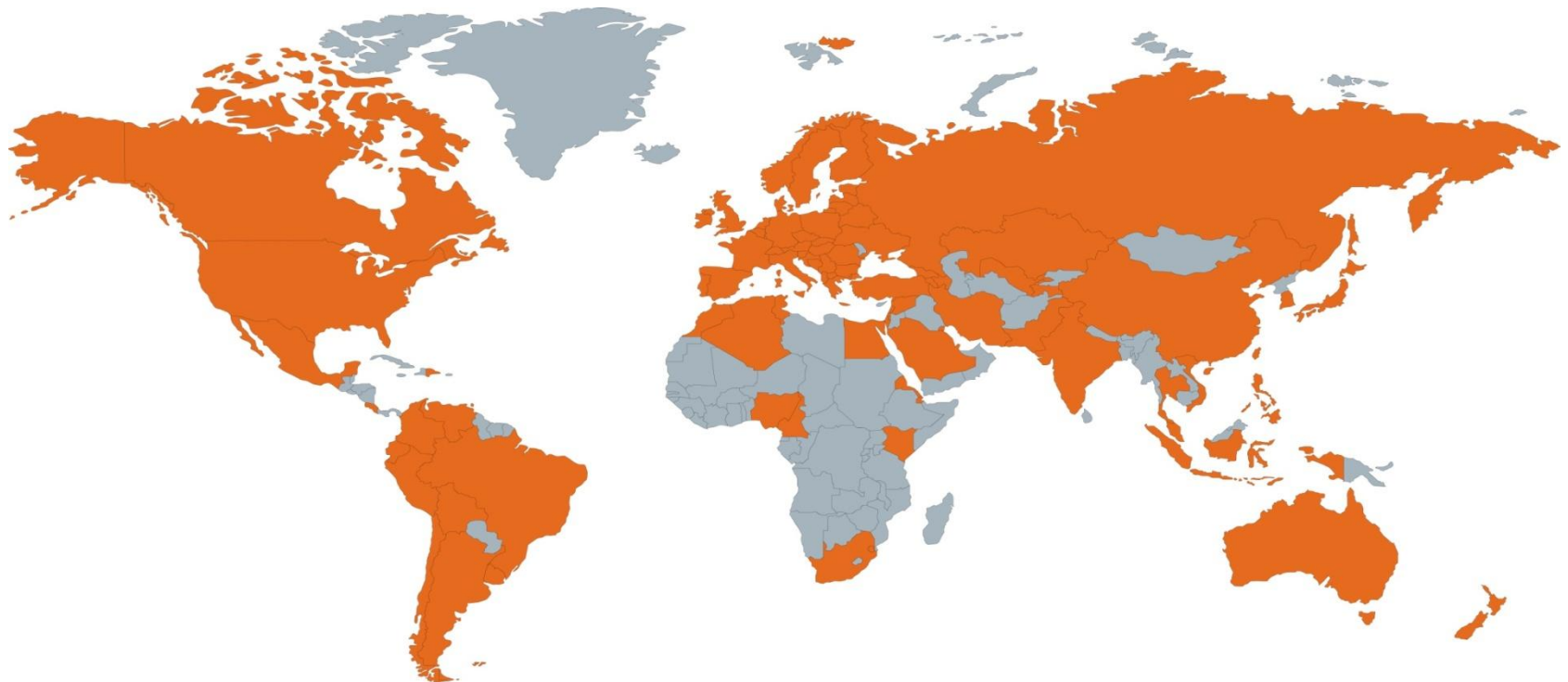
## Countries and Consumers

 Countries and Consumers	
 Consumer Trends and Lifestyles	 Industry, Infrastructure and Environment
 Economy, Finance and Trade	 Population and Homes
 Government, Labour and Education	 Technology, Communications and Media
 Income and Expenditure	 Survey

 **Cities**

**CAMI**

# GEOGRAPHIC COVERAGE



Industries – 80 countries  
■ 85% of world population  
■ 98% of global consumer spending



Countries & Consumers – 210 countries

## COMPARE Countries

Market Sizes | Historic/Forecast | Retail Value RSP | US\$ Per Capita (Male Population) | Constant 2013 Prices

Key: ■ Related Analysis ▲ Chart this Row ■ Company Shares ■ Brand Shares ■ Distribution ■ Pricing ■ Urban vs Rural

Change View: 2013 2014 2015 2016 2017 2018

Country	2013	2014	2015	2016	2017	2018
Brazil	46.4	52.5	55.8	61.9	66.9	72.1
Ireland	61.2	62.2	63.7	65.5	67.2	68.7
Germany	55.4	56.4	56.7	56.9	56.9	56.9
United Kingdom	52.1	52.3	52.6	52.9	53.1	52.5
Norway	47.5	47.9	48.3	48.6	48.8	49.1
Netherlands	51.8	50.9	50.3	49.8	49.4	49.0
Austria	47.9	47.7	47.6	47.5	47.6	47.6
South Korea	36.4	38.3	40.3	42.3	44.2	46.0
Switzerland	48.4	47.5	46.5	46.0	45.4	45.0
Australia	45.0	45.4	45.0	44.5	44.2	43.9

## Visualise GROWTH MARKETS



**Passport**

SEARCH INDUSTRIES COUNTRIES

**Consumer Appliances**

**SEARCH TREE**

Select category...

Go >

**ANALYSIS FINDER**

All Analysis

Select Geography ...

Go >

**RANK COUNTRIES**

Choose a category

Size  Forecast  
 Growth  Historic  
 Per cap.

Go >

**RANK CATEGORIES**

For a geography...

Size  Forecast  
 Growth  Historic  
 Per cap.

Go >

**REVIEW TOP COMPANIES**

Select company...

Go >

**DASHBOARDS**

VISUALISE DATA

Select...

Go >

## Homework for Dishwasher Manufacturers

Opinion | 25 Mar 2014



**Jamie Ko**  
Head of Consumer Appliances

Dishwashers remained the smallest category in major appliances in 2013, accounting for a mere 4.4% share of overall volume sales. It is also a category in which average unit price, at US\$609, is significantly higher than in major appliances as a whole (US\$444). Dishwashers are generally not perceived as an

### DID YOU KNOW?

Germany accounts for one-third of electric toothbrushes volume sales in Western Europe

Built-in hobs sell the most in Asia Pacific

Japanese households prefer 4-door fridge fr

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## Find ANALYSIS

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## EVALUATE Companies

**Smooth Sailing for Old Navy in China?**

Opinion | 28 Feb 2014

**Ashlea Knudts**  
Analyst - Apparel and Footwear

In a bid to meet an opportunity in China, Gap Inc. opened its first Old Navy store in Shanghai on 1 March 2014. While other international brands (Dora's anonymous label included) have been chasing the aspirational Chinese consumer, Old Navy will be taking its act into the economic segment, existing in family-orientated shopping culture.

**The Japanese Blueprint**

Will this all-American brand message translate in China? The answer is a convincing yes, judging by the brand's success in neighbouring Japan. Gap Inc. launched its first Old Navy store in Tokyo in July 2012, uniquely targeting the city's time-strapped mothers who control the family's financial budget. The brand passed up the glamorous shopping districts of Ginza and Omotesando in favour of more family-friendly Odessa for the location of its first store.

Since its debut, Old Navy's Japan store count has grown to 18 as of February 2014, and has become a new avenue for Gap, Inc.'s growth in the Japanese apparel market. It was an astute move to improve market share, following the shift towards SWIFT among Japanese consumers, with native shop's ubiquitous return. Old Navy also offers a fresh alternative in retail fashion.

Given the brand is able to provide growth to the company in a market so tired as Japan (set to register a 0% constant value CAGR over 2013-2018), then its prospects in China (set to contribute to half of global sales over the same period) look even stronger.

... appliances with similar  
... degree of popul  
... ts a credible volume c

## Identify TRENDS

**7-Eleven's New Fresh Coffee Offer Boosts Takeaway Trend in Japan**

Opinion | 28 Feb 2014

**Elizabeth Friend**  
Senior Analyst - Consumer Foodservice

Coffee is incredibly popular in Japan, but not in the form you might expect. It comprises nearly 20% of the total liquid volume of non-alcoholic beverages sold in the off-trade channel, but the majority of this demand stems from canned RTD coffee, a very inexpensive, convenience-based product that is typically purchased at convenience stores, grocery stores, or from vending machines. Hot fresh coffee also has a historic following, but much of it skew towards inexpensive coffee served at traditional kassaten cafes. More modern, premium consumption is now also growing with the help of Starbucks, but there remains a broad expanse of white space in the market between convenience-based RTD coffee, consumed quickly and with little regard to quality, and the much more premium experience of dining-in at a specialist coffee shop. Until now that is, with the emergence of 7-Eleven's Seven Cafe.

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## DID YOU KNOW?

Super premium was the fastest growing jeans segment in Western Europe in 2013

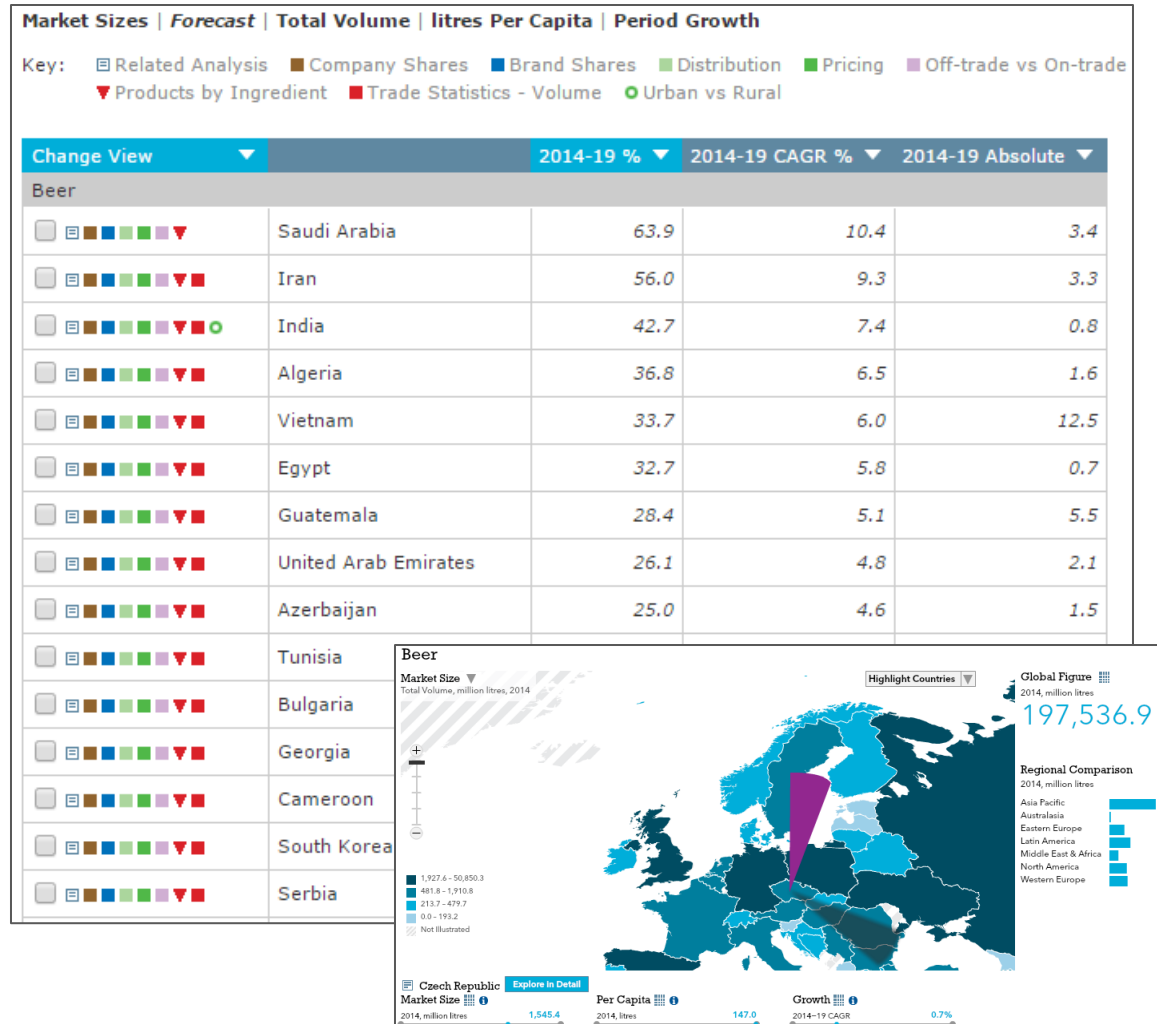
Per capita volume sales of socks in China will overtake the US in 2014

Global volume sales of ties are set to grow by 49% by 2018

## Forecast growth categories and markets

In 2014 over 147 liters of beer was sold in Czech Republic per person.

Saudi Arabia, Iran and India are forecast to be the fastest growing markets of beer (2014-2019)



## Create strategies based on country/regional markets

Weight management continued to be led by Herbalife Czech Republic, which held a 30% value share in 2014. The company benefited from its strong position within meal replacement slimming and weight loss supplements, the most developed product categories, where it led sales in 2014.

### Weight Management in the Czech Republic

Category Briefing | 01 Apr 2015

#### HEADLINES

- Weight management achieves only marginal current value growth in 2014 to reach sales of CZK360 million
- Higher willingness of Czech consumers to spend money supports sales of weight management in 2014
- Slimming teas remains the most dynamic product category, rising by 13% in current value sales in 2014
- Herbalife Czech Republic leads in 2014

Weight management is expected to continue to grow in the forecast period

#### TRENDS

- Weight management achieved a 3% increase in current value sales in 2014, which represented an improvement from 2013. This performance in 2014 can be attributed to the strong performance of slimming teas, which boosted consumer confidence at the end of the year.
- Sales were driven by slimming

Table 4 LBN Brand Shares of Weight Management: % Value 2011-2014

% retail value rsp	Company	2011	2012	2013	2014
Herbalife	Herbalife Czech Republic sro	31.9	31.5	31.0	30.3
Bioaktivni	Pharma Nord sro	8.5	8.7	9.0	9.1
Guareta	Dr Stanek spol sro	7.7	7.9	7.8	7.9
Nutrend	Nutrend DS as	6.8	6.9	7.4	7.8
GS	Green Swan Pharmaceuticals CR as	6.6	6.9	7.1	7.3
Aminostar	Aminostar sro	4.8	4.9	5.0	5.5
Modifast	Novartis sro	4.5	4.6	4.6	4.7
Orlistat Sandoz	Sandoz sro	-	3.7	3.6	3.3
Orlistat Teva	PGT Healthcare	-	0.1	2.3	2.7
Lipoxal	Walmark as	1.2	1.3	1.4	1.7
Bellasin	Walmark as	1.1	1.2	1.4	1.6
LKVB6	KLAS EU sro	-	1.1	1.4	1.4
Dietline	Dr Stanek spol sro	1.4	1.4	1.4	1.4
Multaben	Atlantic Multipower Germany GmbH & Co oHG	0.9	0.9	0.9	0.8
Nutrilite	Amway Ceska republika sro	1.1	0.9	0.8	0.6
Nutrabona	Nutra-Bona sro	0.7	0.6	0.6	0.5
Leros	Leros sro	0.3	0.3	0.4	0.4
Herbex	Herbex Czechia sro	0.3	0.4	0.4	0.4
Apotheke	Mediate sro	0.3	0.3	0.4	0.4
Megafyt	Megafyt Pharma sro	-	0.3	0.3	0.4



## Assess company strengths, weaknesses, strategy and positioning

In Eastern Europe, the company is mainly present in the Czech Republic, Romania and Poland, which represent a combined 66% of Schwarz's total sales in the region in 2013.

### STRATEGIC EVALUATION

## SWOT: Schwarz Beteiligungs GmbH

#### STRENGTHS

**Consumers' increasing search for value**

- Strongly benefiting from the trend towards discounting, globally and in Germany, its highly mature domestic market, Schwarz has seen faster growth than overall global grocery retailing in 2013.

**Eastern Europe presence drives sales**

- Schwarz benefits from a wide presence in Eastern Europe, a region in which Aldi is comparatively weak. Slower growth in the region compared to the review period has contributed to Schwarz's sales growth.

#### OPPORTUNITIES

**Growth through international expansion**

- The group could further expand internationally, via expansion in existing markets in Europe and through market entry, notably the Americas as the US and Mexico could offer growth opportunities.

**Internet retailing: Dynamic growth in Germany**

- Schwarz could capitalise on internet retailing growth by expanding its non-grocery online offer but also in grocery as food and drinks internet retailing in Germany is set to post a CAGR of 20% over 2013-2018.

#### WEAKNESSES

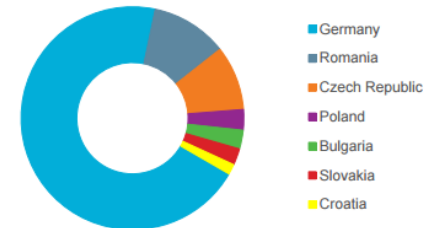
**No presence outside Europe**

- Schwarz's presence is confined exclusively to Europe. This contrasts with Aldi, which has a rapidly growing

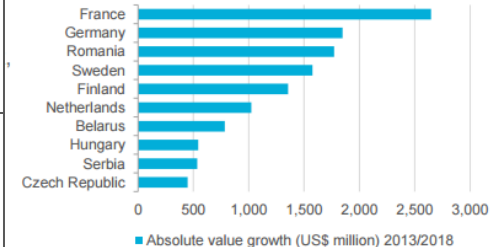
**Late move to the US market**

- Schwarz's late entry in the US may prove challenging given the highly concentrated market. Established

Kaufland: Sales by Market 2013



Hypermarkets in Europe: Top Absolute Growth Markets 2013/2018

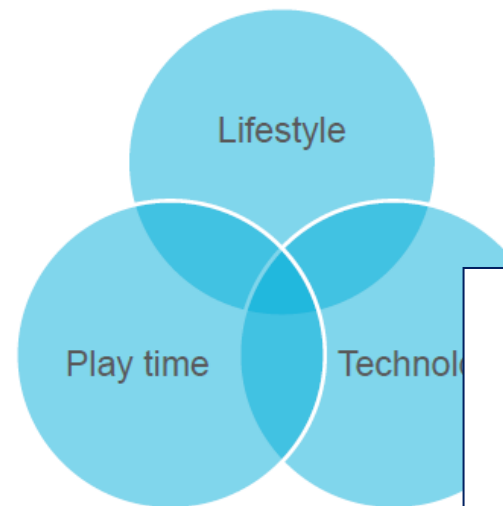


## Understand what drives industry growth

As pets become increasingly humanized, the forecasted growth for more premium and higher-quality pet care products is strong.

Emerging economies account for some of the strongest growth within the pet care industry.

### Pets and owners increasingly intertwined



- Pet ownership has become increasingly sophisticated as a result of humanisation. As owners look at pets as members of their families they look to spend more time with them and share activities. Consumer lifestyles are thus quite relevant to the future of pet care. Owners' lives and pets' lives are increasingly intertwined.
- Above all, the technological revolution is here to stay. New solutions and added convenience are enticing consumers around the world ranging from sophisticated apps to technology enabled products that offer greater convenience.

#### DID YOU KNOW?

**Brazil set to be the largest other pet food market by 2018**

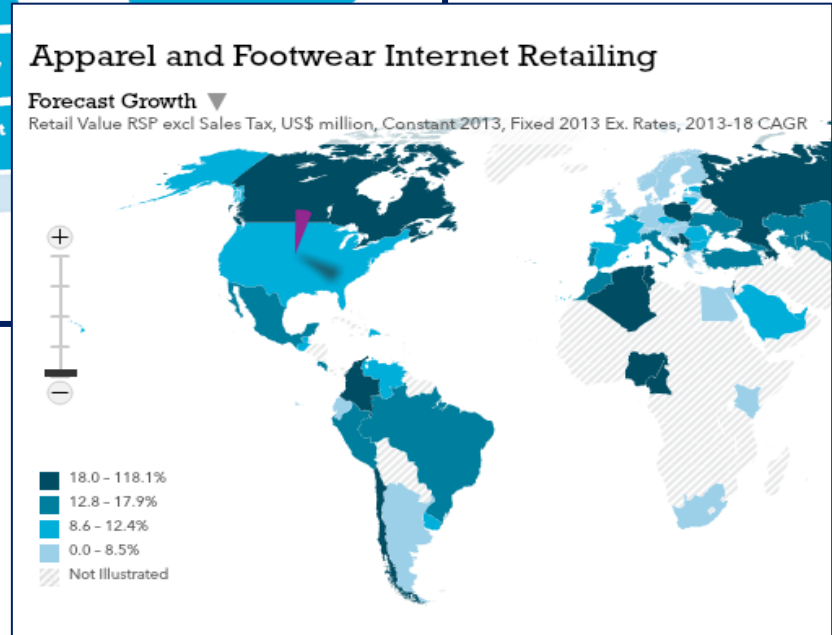
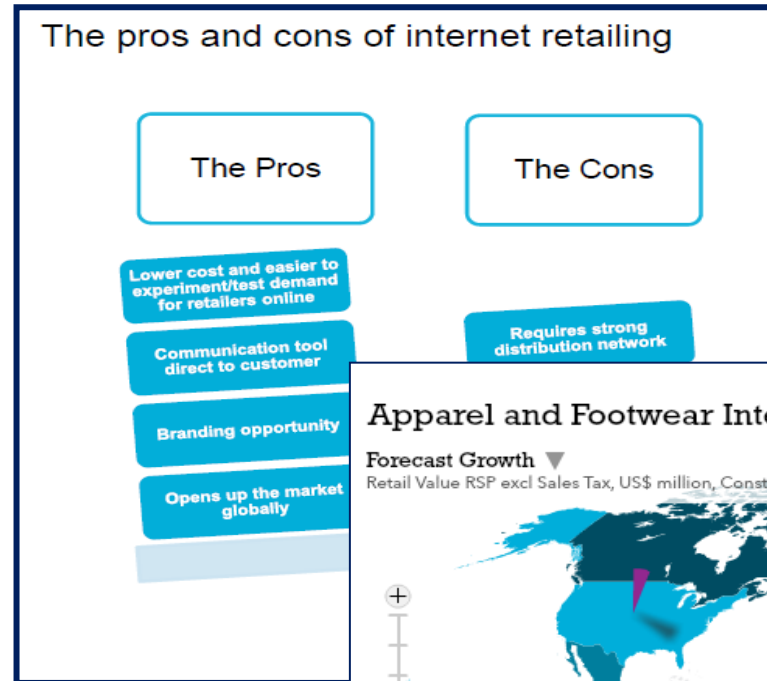
**Italy is the largest pet healthcare market in Western Europe**

**Russia set to be the second largest cat food market by 2018, overtaking UK, Germany and France**

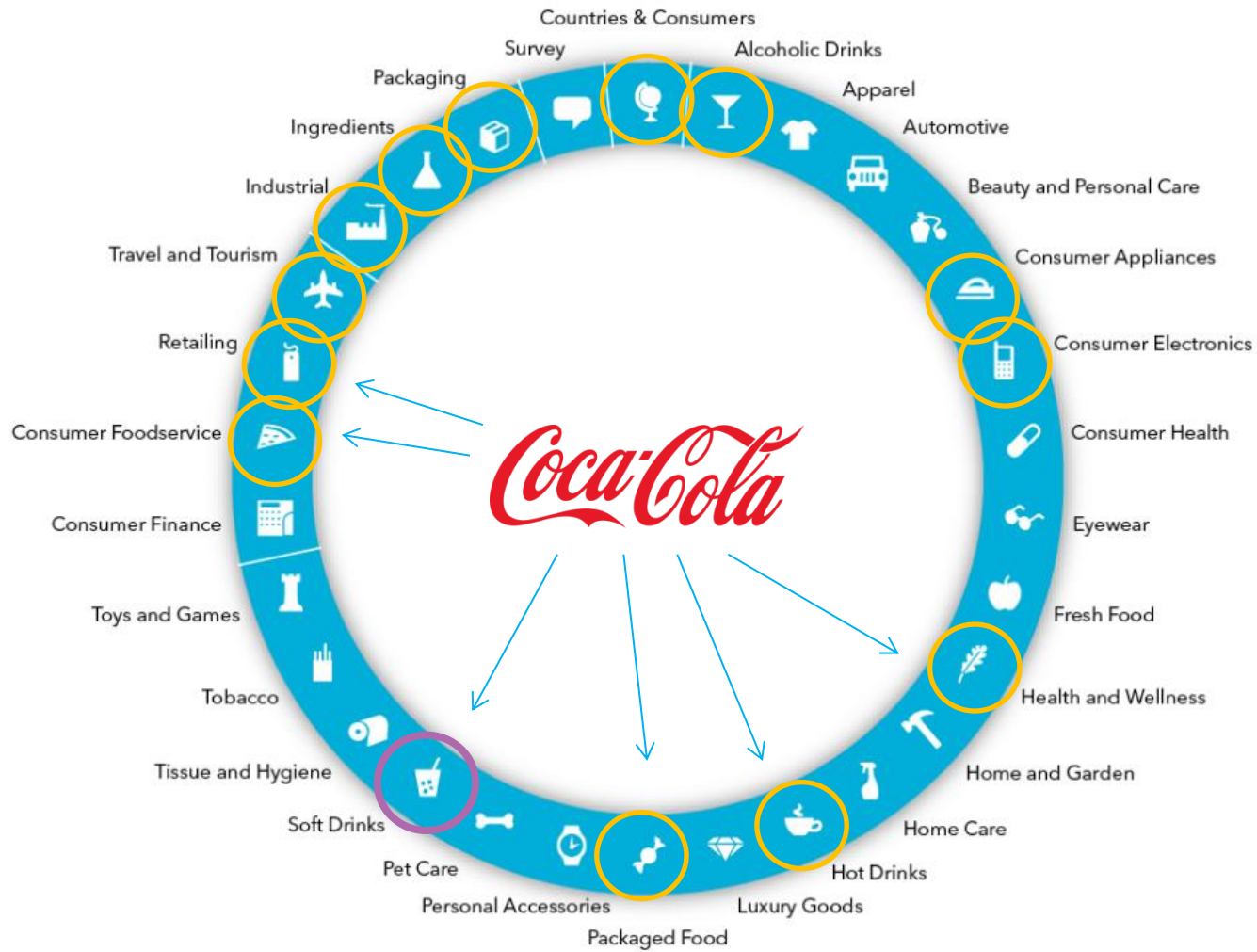
**"Buying pet food is a sign of affluence" - New 16% VAT tax levied in Mexico**

## Understand key routes to market and emerging trends

The rise of internet retailing within the apparel industry has key players scrambling to uncover means to maintain brand identity in a world in which there may be little or no shop-front exposure.



# ANALYSIS WITH CROSS – INDUSTRY FOCUS



# ACADEMIC CLIENTS: SOME EXAMPLES



# Governmental Passport users



THE DEPARTMENT OF TRADE AND INDUSTRY SOUTH AFRICA



ApexBrasil

kotra

Korea Trade-Investment Promotion Agency

BRITISH COUNCIL



JETRO

Japan External Trade Organization



UBIFRANCE

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ΕΛΛΗΝΙΚΟ ΟΡΓΑΝΙΣΜΟΣ ΕΣΤΡΑΤΕΓΙΚΟΥ ΕΠΙΧΕΙΡΗΣΙΑΚΟΥ



INTERNATIONAL ENTERPRIS SINGAPORE



International Trade Canada

Commerce international Canada



EVD internationaal ondernemen en samenwerken



giz



# Corporate





**THANK YOU FOR LISTENING**

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