

## Appendix B—Euromonitor International

### Data Background

The data used in this report were obtained primarily from the commercial data vendor Euromonitor International. Their Integrated Market Information System (IMIS) provides data on market volume and value of sales for products by company, brand, and distribution channels. This information is compiled by a network of 600 researchers carrying out primary and secondary research. To ensure global comparability, standardized international product sectors are developed. In addition to in-depth data collection from core countries, Euromonitor generates data using statistical models for those countries where official data cannot be obtained.

In 2005, IMIS data on retailing and foodservice covered 52 core countries from which detailed data were collected. Currently, data on retailing is available for 80 core countries. However, information on foodservices is available for only 52 core countries. Our study focused only on the core countries from which primary data on both retail and foodservice sales were collected. From the set of core countries, low-income countries, countries with incomplete historical data, and countries with extreme exchange rate movements were eliminated. The final data used in the analysis included 47 middle- and high-income countries (see table 1).

In addition to IMIS, the Global Market Information Database (GMID) component of Euromonitor provides business intelligence on countries, consumers, and industries. It offers integrated access to statistics, reports, and other business information, much of it assembled from other sources such as individual country's national statistics, the OECD, and Eurostat. Food expenditure data used in our study were obtained from GMID. Although the GMID contains over 200 countries, for consistent comparison with the retail and foodservice analyses our report used food expenditure data from only the 47 countries selected from the IMIS database.

All food, retailing, and foodservice expenditures were converted into U.S. dollars at current exchange rates.

### Data Definitions

Food expenditure and sales categories used in our study are pre-established in Euromonitor data.

#### *Data obtained from IMIS*

Euromonitor defines *retail sales* as sales through establishments primarily engaged in the sale of fresh, packaged, and prepared foods for home preparation and consumption. This excludes hotels, restaurants, cafés, duty-free sales, and institutional sales (such as canteens, prisons/jails, hospitals, and the army). This retail definition also excludes the purchase of food products from foodservice outlets for consumption off premises, like impulse confectionery bought from counters of cafés/bars. This sale is included in consumer foodservice sales.

**Packaged foods** are products sold through retail establishments primarily in the form of prepared foods for home preparations or direct consumption such as baked, canned, frozen, or dried food products. Fresh products such as fruit, vegetables, and meat, or basic ingredients such as sugar, flour, and salt are not included.

Based on Euromonitor, *supermarkets* are defined as stores with a selling area of between 400 and 2,500 square meters, selling at least 70 percent foodstuffs and everyday commodities. Outlets below 400 square meters may also be included in certain countries, on the basis of format, product mix, and opening hours (for example “superettes” in Italy). *Hypermarkets* are defined as stores with a sales area of over 2,500 square meters, with at least 35 percent of selling space devoted to nonfoods. All *independent food stores* (non-chained) are defined as those stores with selling space of less than 400 square meters, usually specializing in packaged groceries, where food accounts for at least 50 percent of total retail sales. *Convenience stores* are defined as shops selling a wide range of goods with extended opening hours such as 7-Eleven and Eurofoods. *Discounters* include stores such as Aldi, Lidl and Eda, typically 300-900 square meters and stocking fewer than 1,000 product lines, largely in packaged groceries. Goods are mainly own-label or budget brands. Discounters may also include variety stores/mass merchandisers usually located on one floor, offering a wide assortment of extensively discounted fast-moving consumer goods on a self-service basis. These are normally at least 1,500 square meters in size, and give priority to fast-moving nonfood and textile goods that have long shelf-lives. This includes primarily large chained retail operations such as Wal-Mart, Kmart, and Target in the U.S., Canada, and Mexico.

**Consumer foodservice** is composed of cafés/bars, full-service restaurants, fast-food, 100 percent home delivery/takeaway, self-service cafeterias and street stalls/kiosks. Fast-food outlets are typically distinguished by the following characteristics: a standardized and restricted menu; food for immediate consumption; tight individual portion control on all ingredients and on the finished product; individual packaging of each item; a young and unskilled labor force; and counter service.

#### *Data Obtained from GMID*

**Consumer expenditure on food** is defined as expenditure incurred on food brought into the home.

**Expenditure on bread and cereals** includes grain, flour or meal, bread and other bakery products, mixes and dough for the preparation of bakery products, pasta products in all forms, couscous, breakfast cereal preparations, and other cereal products such as malt, malt flour, malt extract, potato starch, tapioca, sago, and other starches.

**Expenditure on meat** includes fresh, chilled or frozen meat, edible offal, dried, salted or smoked meat and offal such as sausages, salami, bacon, ham, and pâté, other preserved or processed meat and meat-based preparations such as canned meat, meat extracts, meat juices, meat pies, and others.

***Expenditure on seafood*** includes fresh, chilled, or frozen fish and other seafood such as crustaceans, mollusks, other shellfish and sea snails, dried, smoked or salted fish and seafood, other preserved or processed fish and seafood and fish and seafood-based preparations such as canned fish and seafood, caviar and other hard roes, fish pies, and others.

***Expenditure on dairy*** includes raw milk, pasteurized or sterilized milk, condensed, evaporated, or powdered milk, yogurt, cream, milk-based desserts, milk-based beverages and other similar milk-based products, cheese and curd, eggs, and egg products made wholly from eggs.

***Expenditure on oils and fats*** includes butter and butter products such as butter oil and ghee, margarine, other vegetable fats including peanut butter, edible oils such as olive oil, corn oil, sunflowerseed oil, cottonseed oil, soybean oil, groundnut oil, walnut oil and other oils, and edible animal fats.

***Expenditure on fruit*** includes fresh, chilled or frozen fruit, dried fruit, fruit peel, fruit kernels, nuts and edible seeds, preserved fruit, and fruit-based products. Melons are also included in this group.

***Expenditure on vegetables*** includes fresh, chilled, frozen, or dried vegetables cultivated for their leaves or stalks such as asparagus, broccoli, cauliflower, endives, fennel, spinach, and others; for their fruit such as aubergines, cucumbers, courgettes, green peppers, pumpkins, tomatoes, and others; and for their roots such as beetroots, carrots, onions, parsnips, radishes, turnips, fresh or chilled potatoes, and other tuber vegetables such as manioc, arrowroot, cassava, and sweet potatoes; preserved or processed vegetables and vegetable-based products; products of tuber vegetables such as flours, meals, flakes, purées, and chips/crisps, including frozen preparations such as chipped potatoes.

***Expenditure on sugar and confectionery*** includes cane or beet sugar, unrefined or refined, powdered, crystallized, or in lumps, jams, marmalades, compotes, jellies, fruit purées and pastes, natural and artificial honey, maple syrup, molasses and parts of plants preserved in sugar, chocolate in bars or slabs, chewing gum, sweets, toffees, pastilles and other confectionery products, cocoa-based foods and dessert preparations, edible ice, ice cream, and sorbet.

***Expenditure on other food*** includes salt, spices, culinary herbs, sauces, condiments, seasonings, vinegar, prepared baking powders, baker's yeast, dessert preparations, soups, broths, stocks, culinary ingredients, homogenized baby food, and dietary preparations.

***Expenditure on caffeinated beverages*** includes coffee (whether or not decaffeinated, roasted or ground, including instant coffee) tea, maté and other plant products for infusions, cocoa, and chocolate-based powder.

***Expenditure on soft drinks*** includes mineral or spring waters, all drinking water sold in containers, soft drinks such as sodas, lemonades, and colas, fruit and vegetable juices, and syrups/concentrates for the preparation of beverages.

[http://www.euromonitor.com/pdf/Multi\\_industry\\_IMIS.pdf](http://www.euromonitor.com/pdf/Multi_industry_IMIS.pdf)