



General information

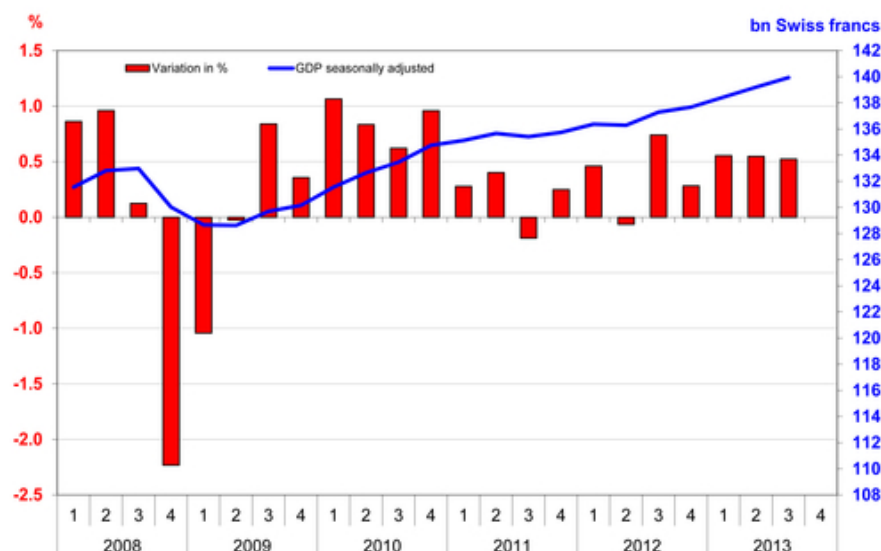
Capital:	Bern	Population:	8.0 m (2012)
Surface area:	41,284 km ²	Unemployment rate:	4.7 % (Q3/2013)
Official language(s):	German, French, Italian, Rhaeto-Romanic	Households:	3.5 m (2012)
Currency:	Swiss franc (CHF)	Average household size:	2.2 people
Trading language(s):	German		

Key macroeconomic indicators

- 7th richest country in the world on per capita basis
- Consumer price inflation 2013: 0.5%
- Unemployment rate Q3/2013: 4.7%

Country	Spending Power (€ per person/2013)	Total € bn
Switzerland	36,351	289.2
Austria	21,295	179.8
Germany	20,621	168.7
Belgium	19,318	150.9

Gross domestic product



Food industry structure

- Number of companies: 203 (-1.9%)
- Number of employees: 37,436 (+0.7%)
- Turnover: CHF 17,682 m or approx. € 14,500 m (-6.8%) of which exports account for 19%
- Highest export value shares of total turnover: baby food (79%), sugar confectionery (69%), instant coffee (64%), chocolate (47%) and long-life bakery products (27%)
- Most important food export categories: drinks, bakery goods, beef and cheese

Grocery retail structure

- Two main retail groups (MIGROS and COOP) account for 66% of food turnover
- Discounters Aldi and Lidl gaining importance
- Sophisticated private label business
- High percentage of shopping tourism due to lower food price levels in neighbouring countries

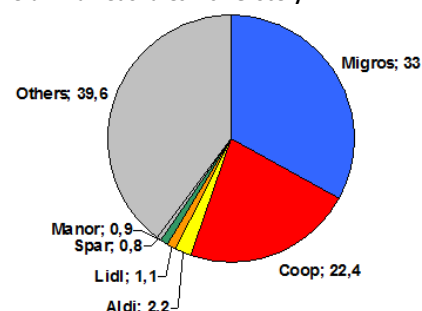
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February 2014



Major grocery retailers

Group	No. of stores	Food turnover, gross (in bn CHF) 2012	Market share Food (%)	Positioning
Migros	556	14.5	34	Leader, extensive PL range, product choice, ethically correct...
Coop	822	10.6	32	Multi-format, strong brands and private label, innovative
Manor	64	3.0	n.a.	Food hall in department store
Denner	465	2.8	n.a.	Discount (70% owned by Migros)
Spar (Switzerland)	184	1.0	n.a.	Family-owned, passion for food

Overall Market Shares incl. Grocery



Foodservice structure

- Tourism is key factor in economy
- Hotels are of high relevance (approx. 4,700 and 245,000 beds)
- Many independent players
- Top 22 foodservice providers turn over more than CHF 4 bn
- McDonalds dominant, retail and furniture store restaurants of key importance

Main food shows

- Slow Food Market Zurich Nov 2014 Trade and consumer fair
- Igeho Basel Nov 2015 Fair for foodservice, hotel and restaurant catering
- FBK-Bakery and Confectionery Goods Berne Jan 2014 Bakery, confectionery, food processing, food, beverages, shop fitting, display
- Salon Du Chocolat Zurich April 2014 Consumer fair

Main trade magazines

- Foodaktuell, Brunner Druck und Medien, twice per month, retail and foodservice
- Alimenta, Publi-Lactis AG, circulation 3,282, twice per month, food production, retail and suppliers
- Salz&Pfeffer, Edition Salz & Pfeffer AG, 8 issues per year, circulation 20,000, foodservice and suppliers
- Gastro Journal, GastroSuisse, online magazine, foodservice, hotels

Consumer behaviour today & expected food trends – Opportunities for Flemish food exporters

- High food quality important: Switzerland is a “foody nation”
- Internationally oriented population
- Key trends: convenience, health & wellness, ethics and sustainability, regional / origin, indulgence & premium
- Home cooking with high end ingredients growing more and more popular

EVALUATION OF MARKET AND OPPORTUNITIES

- High living standard and high per capita income
- Two well developed, modern retailers
- Price not exclusive focus
- Sophisticated private label business in both leading retailers
- Tourism sales (food service channels)
- Up-market niche sales channels
- Switzerland is not part of the EU
- Customs duties vary according to product category
- Logistics – geographical and climatic characteristics to be taken into account

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