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Dagligvareleverandørerne - DLF
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EURO BRANDS PRICE BAROMETER 2011 H2 RESULTS.

Europæisk forbrugerpris benchmark.

Benchmark: Norge, Sverige, Tyskland, Belgien, England, Holland, Frankrig,
Spanien, Portugal, Schweiz, Italien.



Prepared for AIM & Dagligvareleverandørerne April 2012.

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Description of EPB (Euro Price Barometer) Method

- Nielsen identified manufacturer products that exist in multiple countries **based on matching and identifying those EAN that are identical**. The product item matching is done within stores of greater sales area than 400 sqm to ensure maximum sales outlet coverage. Prices are based on a properly projected sample of stores.
- For the basket of common products, Nielsen extracted **scanning data for a 6 month** period, which for this deliver was the second half of 2011.
- The scanning data is used to calculate an average volume-weighted price (across time) for each common item. Volumes is also used to **weight the basket** (to reflect consumer expenditures), similar to the current Euro stat process. This weighting procedure means the final price indexes will reflect consumption pattern differences, seasonality and promotion effects.
- Results provided are based on with and without VAT for both unweighted data and data that has been weighted based on consumption.

SKU count basket grid



of matched EAN products per country pair

of matched EAN products per country pair

Country	Belgium	Switzerland	Germany	Denmark	Spain	France	Italy	Norway	Netherlands	Portugal	Sweden	UK
Belgium		3.008	4.580	1.496	2.578	10.962	3.983	831	7.658	3.511	1.513	2.216
Switzerland	3.008		9.429	1.303	5.217	4.293	4.462	615	1.642	2.823	1.595	1.499
Germany	4.580	9.429		2.125	3.038	3.584	4.829	1.052	3.499	3.277	2.410	2.075
Denmark	1.496	1.303	2.125		1.056	1.343	1.349	2.184	1.203	1.362	3.951	1.245
Spain	2.578	5.217	3.038	1.056		3.227	3.618	541	1.413	9.430	930	1.891
France	10.962	4.293	3.584	1.343	3.227		3.657	647	2.263	5.881	1.323	1.728
Italy	3.983	4.462	4.829	1.349	3.618	3.657		578	1.628	3.837	1.405	1.404
Norway	831	615	1.052	2.184	541	647	578		581	626	2.660	783
Netherlands	7.658	1.642	3.499	1.203	1.413	2.263	1.628	581		1.746	1.153	1.640
Portugal	3.511	2.823	3.277	1.362	9.430	5.881	3.837	626	1.746		1.262	2.029
Sweden	1.513	1.595	2.410	3.951	930	1.323	1.405	2.660	1.153	1.262		1.283
UK	2.216	1.499	2.075	1.245	1.891	1.728	1.404	783	1.640	2.029	1.283	
Avrg.	3.849	3.262	3.627	1.692	2.994	3.537	2.795	1.009	2.221	3.253	1.771	1.618

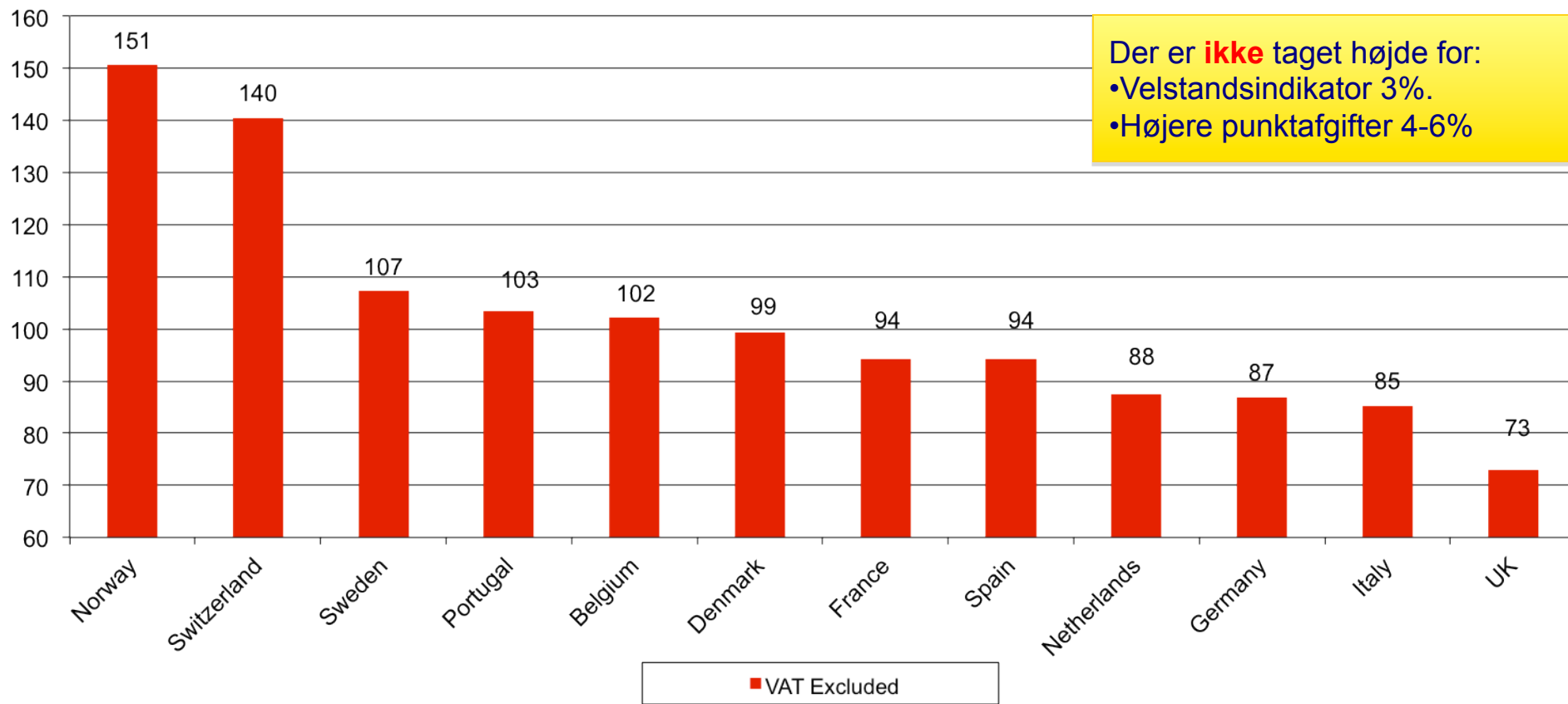
Average Basket Size = 2636 EAN products

DK 1692 produkter med "fælles" EAN kode.

Key Driver → Lille marked og DK særregler → lavere effektivitet.

Relative Price Position within 12 markets evaluated

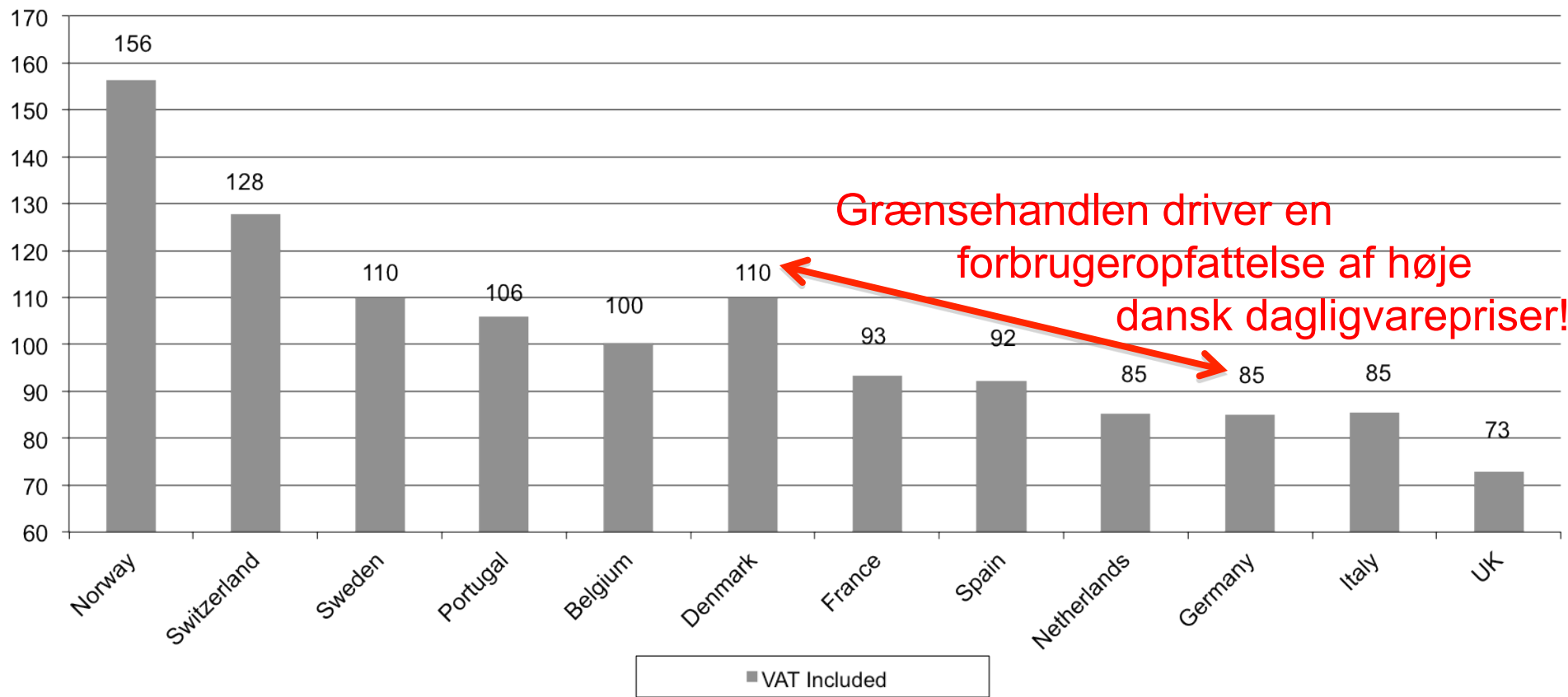
Euro Price Barometer - H2 2011



Based on prices with VAT included and VAT excluded
Basket weighted by consumption

Relative Price Position within 12 markets evaluated

Euro Price Barometer - H2 2011



Based on prices with VAT included.
Basket weighted by consumption

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Case: CocaCola tilbud uge 30 – 35.



MÅNEDENS
**PRIS
HUG**

2 LITER

Coca Cola, Fanta
eller Sprite
a 2 liter Ekskl. embl.
Pr. liter 7,50

PR. FLASKE
15.-

VED KØB AF MERE END 18 FL.
ER PRISEN PR. FL. TIL 30⁷⁵

NOVEMBER

Detailed description: A promotional advertisement for Coca-Cola products. It features five 2-liter plastic bottles: three Coca-Cola variants (regular, light, and zero) and two Fanta variants (orange and lemon). A large black banner at the top reads 'MÅNEDENS PRIS HUG'. A green box on the right states '2 LITER' and 'Coca Cola, Fanta eller Sprite a 2 liter Ekskl. embl. Pr. liter 7,50'. A large green price tag says 'PR. FLASKE 15.-'. A red banner at the bottom indicates 'VED KØB AF MERE END 18 FL. ER PRISEN PR. FL. TIL 30⁷⁵'. The word 'NOVEMBER' is partially visible at the bottom left.

Pris pr. L
excl. moms og afgifter:

- Bilka kr. 3,95

Coca-Cola produkter
Flere varianter
72 x 0,33 liter

3 KASSER
Kr. **149⁹⁹**

3 KASSER

Detailed description: An advertisement for Coca-Cola products. It shows a row of six 330ml cans: Coca-Cola (red), Coca-Cola zero (black), Coca-Cola light (white), Fanta orange (orange), Fanta lemon (green), and Sprite (blue). A large yellow speech bubble above the cans says '3 KASSER Kr. 149⁹⁹'. A black speech bubble to the left says '3 KASSER'. Text on the left reads 'Coca-Cola produkter', 'Flere varianter', and '72 x 0,33 liter'. The logo 'Bilka i samarbejde' is visible in the top right corner.

- Otto Duborg kr. 5,22

Case: Heineken tilbud uge 22 – 33.



Pris pr. kg
excl. moms og afgifter:

Til 6 x 33 cl
Heineken, Royal Export, Pepsi eller Faxe Kondi
6 x 33 cl
ex. emb.
pr. liter 15,50
(1 stk. op til 9,49 ex. emb.)

NETTOPRIS
*** 30,-**

Del Monte
Quality
100% PURE
ORANGE
100% FRUIT CONCENTRATE

NETTO

- Netto kr. 8,26

Er også set til 6 for kr 25,00, i kalkulationen er anvendt 6 for kr 30,00

24 ds. Heineken
24 x 0,33 l.
kr. 89,95

Fleggaard®
Lige over grænsen

- Fleggaard kr. 8,73

Case: Kærgården tilbud uge 30 – 35.



Pris pr. kg
excl. moms og afgifter:

Arla Kærgården Original butter advertisement. It features a red circular sticker with the text "2 bægere 22,- SPAR OP TIL 13,90" and a green "Super Best" sticker. A yellow price tag shows "NETTOPRIS 17,95 350 g". The Netto logo is also visible.

- SuperBest kr. 37,44
- Netto kr. 34,61
- (laveste pris DK kr. 25,58)



Arla Kærgården butter advertisement. It features a red circular sticker with the text "Pr. pakke 9,99". Below the sticker, it says "Arla Kærgården Saltet, pakke à 250 gram Max. 10 pakker pr. husstand pr. dag".

OTTO DUBORG
SCANDINAVIEN CENTER

FRIT VALG
Kr. 99,99

10 PAKKER

10 pakker
husstand pr. dag

- Poetzsch kr. 37,35
- OttoDuborg kr. 37,35
- (lavest pris Tyskland kr. 33,46)

Faktorer der påvirker dagligvareleverandørerne:



- Forbrugeropfattelsen → øget fokus på laveste pris
 - Begrænser mulighed for innovation – f.eks. økologi.
 - Begrænser branchens mulighed for vækst og jobskabelse.

- Ny sukkerafgifter → tab af arbejdspladser.
 - Yoghurt case: 1l yoghurt bliver fem kroner dyrere → dyrere yoghurt betyder mindre salg og i sidste ende fyringer.
 - »Hvis vi får en omsætningsnedgang i den her størrelsesorden, kan det medføre, at et trecifret antal medarbejdere kommer i fare. Hvor og hvor hurtigt det vil komme, kan jeg ikke sige nu,« siger Peter Giørtz-Carlsen, Arlas landechef i Danmark.

- Fedtafgift → fokus på laveste pris → dårligere fødevarekvalitet.
 - Rullepølse case:
 - "Den Grønne Slagter" 3% fedt, belastes med samme fedtafgift som traditionel fedtafgift 18-25% fedt.
 - Øget fokus på laveste pris (grænsehandlen) presser markedet over i billigere udskæringer → dårligere fødevarekvalitet.

Faktorer der påvirker dagligvareleverandørerne:



• Administrative omkostninger → lavere investeringer i vækst og jobskabelse.

- Komplex administration → øgede omkostninger.
- Negativ cash flow → færre investeringer.
- Leverandørerne presses til at yde rabat på afgifter → færre investeringer.

Indeksring af afgifterne vil fastholde prisopfattelsen:

- Indeksring af den fremtidige grænsehandel
- Begrænser innovation og vækst
- Tab af arbejdspladser

Back Up!

The Nielsen logo is positioned in the bottom right corner of the slide. It consists of the word "nielsen" in a lowercase, sans-serif font, with a horizontal line of seven dots underneath it. The logo is contained within a white circular shape that overlaps the green curved border at the bottom of the slide.

nielsen

VAT rates used per product' s category for each country

	BE	CH	DE	DK	ES	FR	IT	N	NL	PT	SE	UK
<i>AUTOMOTIVE</i>	21%	8%	19%	25%	18%	19.6%	21%	25%	19%	23%	25%	20%
<i>BABY CARE</i>	21%	8%	19%	25%	18%	19.6%	21%	25%	19%	23%	25%	20%
<i>BABY FOOD SPECIALISED</i>	6%	2.5%	7%	25%	8%	5.5%	21%	14%	6%	13%	12%	0%
<i>BEVERAGES - ALCOHOLIC</i>	21%	8%	19%	25%	18%	19.6%	21%	25%	19%	23%	25%	20%
<i>BEVERAGES - NON ALCOHOLIC</i>	6%	2.5%	19%	25%	8%	5.5%	21%	14%	6%	6%	12%	20%
<i>CONFECTIONERY & SWEET BISCUITS</i>	6%	2.5%	7%	25%	8%	19.6%	10%	14%	6%	23%	12%	20%
<i>COSMETICS & FRAGRANCES</i>	21%	8%	19%	25%	18%	19.6%	21%	25%	19%	23%	25%	20%
<i>FOOD - AMBIENT</i>	6%	2.5%	7%	25%	8%	5.5%	10%	14%	6%	13%	12%	0%
<i>FOOD - FROZEN</i>	6%	2.5%	7%	25%	8%	5.5%	10%	14%	6%	13%	12%	20%
<i>FOOD - PERISHABLE</i>	6%	2.5%	7%	25%	8%	5.5%	10%	14%	6%	6%	12%	0%
<i>GARDEN & FLORA</i>	21%	8%	19%	25%	18%	19.6%	20%	25%	19%	23%	25%	20%
<i>HEALTHCARE</i>	21%	8%	19%	25%	18%	19.6%	21%	25%	19%	23%	25%	20%
<i>HOMECARE</i>	21%	8%	19%	25%	18%	19.6%	21%	25%	19%	23%	25%	20%
<i>HOMECARE MERCHANDISE</i>	21%	8%	19%	25%	18%	19.6%	21%	25%	19%	23%	25%	20%
<i>PERSONAL CARE - GROOMING & HYG</i>	21%	8%	19%	25%	18%	19.6%	21%	25%	19%	23%	25%	20%
<i>PET FOOD</i>	21%	2.5%	7%	25%	8%	19.6%	10%	25%	19%	13%	25%	20%
<i>PETS & PET CARE</i>	21%	8%	19%	25%	18%	19.6%	21%	25%	19%	23%	25%	20%
<i>STATIONERY & PRINTED MATERIAL</i>	21%	8%	19%	25%	18%	19.6%	21%	25%	19%	23%	25%	20%
<i>HOME DO IT YOURSELF</i>	21%	8%	19%	25%	18%	19.6%	21%	25%	19%	23%	25%	20%
<i>KITCHEN & TABLEWARE</i>	21%	8%	19%	25%	18%	19.6%	21%	25%	19%	23%	25%	20%
<i>PERSONAL CARE APPLIANCES</i>	21%	8%	19%	25%	18%	19.6%	21%	25%	19%	23%	25%	20%
<i>TOBACCO & SMOKING ACCESSORIES</i>	21%	8%	19%	25%	18%	19.6%	21%	25%	19%	23%	25%	20%