

# Freiberger

The Convenience Food Group

## Freiberger Group a European Perspective

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## Today's Presentation

- Who Freiberger are
- Experience in the UK
- Impacts on our company
- European perspective

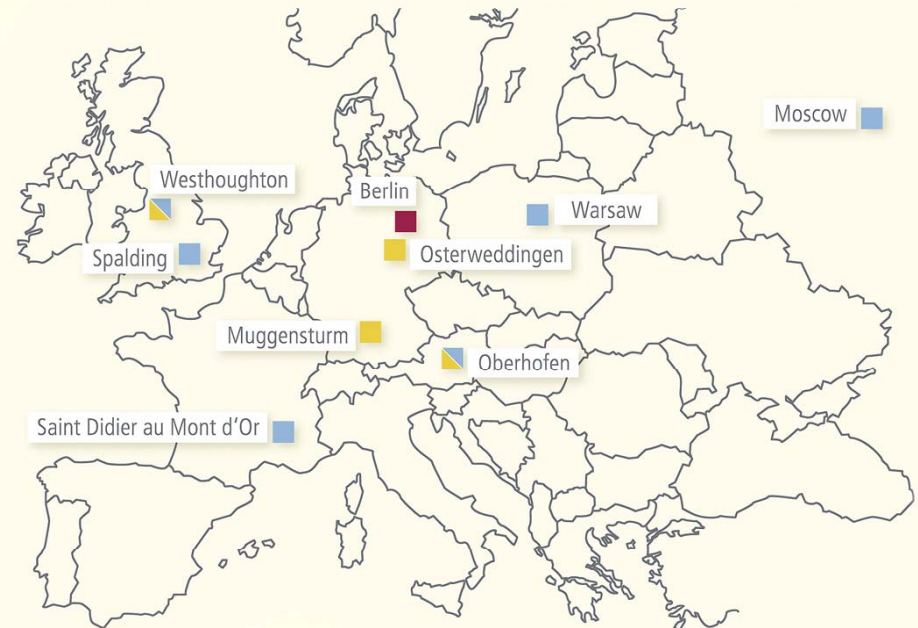


## Who Freiberger are

Freiberger

The Convenience Food Group

- Part of the Südzucker AG Group  
€4.5bn and 20,000 employees
- We operate from 6 factories
  - 3 in Germany
  - 1 in Austria
  - 2 in UK
- We supply Private Label to a wide cross section of retail groups in Europe and beyond, supplying into 48 different countries



## Who Freiburger are

Freiburger

The Convenience Food Group

- Whilst a large manufacturing operation we use craft bakery principles for all our bakery operations
- We use natural ingredients and we believe that the quality of the final product is in direct proportion to the quality of the raw materials used



## Who Freiburger are



- We make about ½ billion products per year
  - Of which 85% is under supermarkets own label
  - 90% is Pizza and Bread snacks
- Core philosophy is our customers successes is our successes



2006 targets for implementation in 2010

1.0 g low salt toppings  
1.2 g high salt toppings

In 2009 the  
FSA issued new targets for 2012

Average salt level of 1.0 g per 100 g  
Max salt level of 1.25 g per 100 g

## Experience in the UK



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- Since the targets were first issued we have encountered a number of issues relating to how the targets are used
  - As sold vs. As consumed
  - Inclusion by some customers of cheese products in the lower target
  - Disparity about on pack information salt vs. sodium
  - What is the measure , sales weighted average? brand? own brand?
  - Analytical data vs. calculated data

## Experience in the UK

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- The Own Label sectors both frozen and chilled have seen the fastest pace of change
- Driven principally by suppliers responding to revised nutritional policies from the retail chains



# Experience in the UK - Consumer Channels



## Experience in the UK

### 2010 targets in 2008



### 2009 nearly 0.5g less per pizza



## Impacts on our company

- Clean label with the removal of colours, additives and flavours
- Removal of Hydrogenated Fats
- No GMO
- Traceability
- Ever improving technical standards / requirements
- Oh and a major currency movement which effectively **increased our costs by 25%**





- Apart from the UK there seems to be minimal requests coming from our customer base in the rest of Europe for lower salt products
- There seems to be a total lack of drive from other countries and customers
- This will give our group a major problem as we need raw materials that contribute salt to be re-formulated to lower the contribution they make to the salt levels in pizzas

- Shelf life
- Environment, sustainability and reduce food waste
- Safety
- Cheese grate
- Without the drive for a European market we could face having limited options for raw materials, possibly where they exist with higher costs



## European Perspective

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- Remember why people buy food, whilst some of it for fuel the majority of it is for enjoyment
- Unless the wider market moves with our sector both on a local level (UK) and a wider European level then we are in danger of alienating our consumers.



## European Perspective

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Thank you for your attention.

