Edible oils, olive oils, butter and margarine in Europe, consumptions, expenditure, growth & players
Food for Thought FFT, April 2011

Summary

Oils and fats Market in Europe puts direct human consumption at Euros 24.2 billion in 2009, or 2.2% of the all food and drink market of Euros 1111 billion. Oil, butter, margarine, olive oil market is forecast to decline at an average annual real -0.76% during the 2009 - 2012 period.

More than 420 companies are involved in Oils and Fats across Europe, with the Top-10 companies supplying 47.7% of the market. Current major players are Unilever with a market share of 15.3%, followed by Grupo SOS (9.9%) and Dairy Crest (3.3%).

Edible oils and fats Markets covers All Oils & Fats, All Butter, Butter (standard), Other dairy spreads, All Margarine, Margarine (standard), Other non-dairy spreads, All Edible Oils, Olive oil, Other oils, Cooking fats (retail only) - in the 16 countries of Europe. Thus, 112 country and product markets are covered, with Unilever have a leading presence, being present in 68 markets.

Top ten companies in the Oils and Fats:

Country Markets
The largest country market is the Germany, makes up 25% of the total 2009 West European oils and fats market, worth Euros 24.2 billion (for 20% of the total population), the 3 largest West European country markets, including Italy and France, make up 57% of the total West European oils & fats market (for 51% of the total population) and the 5 largest country markets, including Spain and UK, make up 74% of the West European market (for 77% of the total population).
The best 3 countries market performances based on annual real % growth (2004-2009) are Norway (+1.9%), Spain (+1.7%) and Germany (+1.3%).

Product Markets
The largest product market (among the 7 products currently selected) is Butter, which makes up 31% of the total 2009 European oils & fats market worth Euros 24.2 billion, or Euros 7.5 billion.
The next largest product market, Olive Oils, makes up 29% of the total market, or Euros 7 billion.
3 largest European product markets, adding Butter, Olive Oils and Other Edible Oils
make up 75% of the total market, or Euros 18.2 billion.

The best 3 product market performances based on annual real % growth (2004-2009) are Olive Oils with 1.9%, followed by Other dairy spreads with 0.3% and Other non-dairy spreads -0.2%.

**Foodservice**

The total foodservice market is worth 12% or Euros 2.9 billion, and the retail market worth 88% with a Euros 21.2 billion.

**Own Label**

In the total market by value, distributors' own label products now make up 24.6%, with manufacturers' branded products making up 73.2% of the total market.

Retail distributors' own label products continue to make inroads into manufacturers' branded products in many food and drink markets.


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Edible, olive, oil, oils, margarine, butter, spreads, fats