

Finnish food and drink market SELMA

THIS IS SELMA

SELMA

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Elintarviketeollisuusliitto



How SELMA came to be

- Need for total market information
- Formed at the behest of the ETL Commercial committee
- Primary goal is to obtain information on the total market, growth and growth trends of the food and drink industry as a whole
- Development Group to develop operating models in February 2009
- The established operating model
 - is based on shared delivery information within the industry
 - has continuity
 - can be developed
 - complies with Competition Act legislation
 - is technically based on the Food Service service model

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SELMA Development Group

Development Group member companies

- Atria Suomi Oy
- HK Ruokatalo Oy
- Saarioinen Oy
- Oy Gustav Paulig Ab
- Apetit Pakaste Oy
- Felix Abba Oy
- Fazer Makeiset Oy
- Fazer Leipomot Oy
- Raisio Oyj
- Olvi Oyj
- Analyse2

Tasks of the Development Group

- Specification of services
- Formation of product areas and product categories
- Preparation of agreements
- Establishment of an IT infrastructure
- Drafting reports
- Marketing planning

SELMA in a nutshell

- **Food market tracking service**, which is based on delivery information from suppliers
- **Provides information on the total market, growth and growth trends of the food and drink industry as a whole**
- **Service administered by ETL subsidiary Suomen Elintarviketeollisuuden Tietopalvelu ETU Oy**
- **Service provider is Analyse2.**
- **The service is being developed by the Development Group, which is comprised of advisers participating in the service.**
- **Competition legislation is taken into consideration when reporting information.** Safe-haven regulations based on legislation are being developed constantly. The validity of regulations is also verified with the competition authorities.

Information provided and transfer of information

Sales info

- EAN
- CustomerID
- EUR
- KG/L

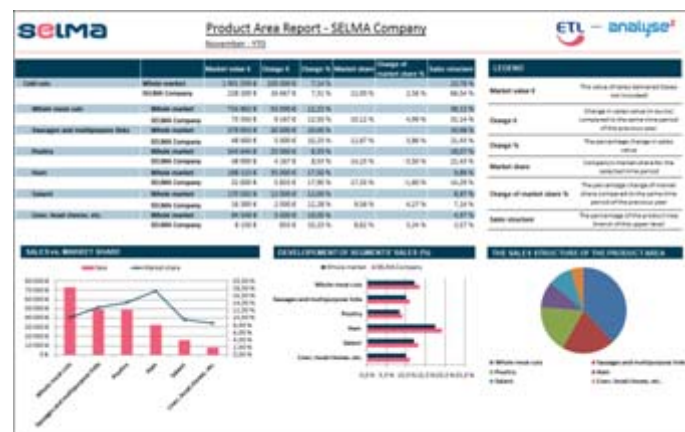
Product info

- EAN
- Product name
- Weight/volume

Customer info

- CustomerID
- Business ID
- Name
- Address

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- Information released once a month
- Information providers offered support services for information transfer

SELMA in a nutshell

- A company can join the service by signing a **Transfer of Source Information Agreement** with ETU Oy.
- **The service's basic reports** are made available to the company after signing the **Service Agreement**. The service is paid for by a **turnover-based user fee**.
- **If desired, product area companies may agree to a shared product category tree**. The fee for the product category tree will be divided among the companies ordering the service. The fee for a product tree is specified separately on a case-by-case basis.
- Upon signing the Service Agreement, a company may sign a **Value Added Service Agreement with Analyse2**. Customised for each company, value added services are services in which Source Information is used.

Service levels

Value added services

- Company-specific

Industry-specific product tree

- Costs shared among operators

Basic reports

- Turnover-based user fee
- Service Agreement

Release of information

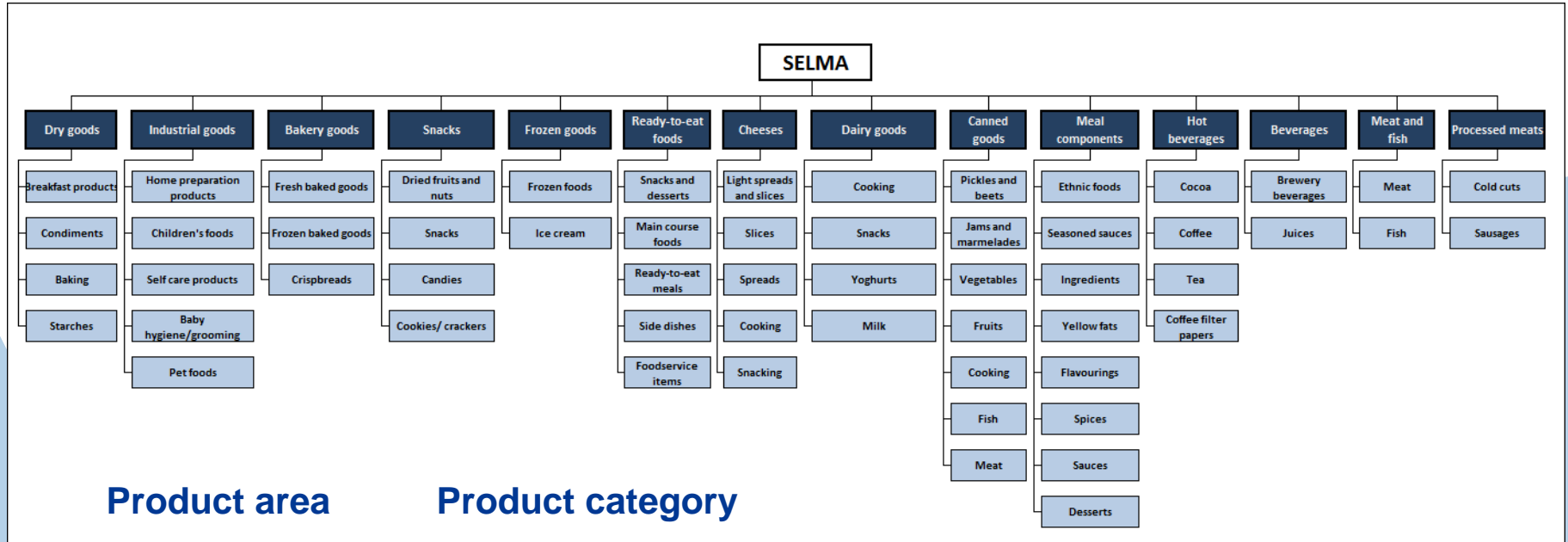
- 0 euros, Source Information Release Agreement
- Free annual report

Product area and product category

A product area is one of SELMA's special features, which has not been available before in any reporting

- A product area is comprised of product categories with similar applications
 - Example: The meat product area may include Pork, Beef, Mutton, Game, Broiler chicken, and Turkey meats as well as meat substitute: Fish
- The product area ensures that no company's market position is an obstacle to reporting.

SELMA TREE



Snacks

Processed meats

Meats and fish

candies, snacks, nuts, dried fruits

sausages, cold cuts. bacon

red meat, poultry, fish

Product category

- A product category is a conventional way for an industry to determine its own position on the market
- In basic reporting all companies use the same product categorisation, which is mutually agreed upon within a given industry
 - The basic report does not include customised product categories

SELMA annual and monthly reporting

Annual reporting

- The company receives a summary report on its own product area and product category. The report is used to compare the market value and trend of the company's product category with the industry's overall value and trend

Monthly reporting includes the following periodic reports

1. Previous month
2. Year to date (YTD)
3. Moving Annual Total (MAT)
4. Quarterly (Q1: 1-3; Q2: 4-6; Q3: 7-9; Q4: 10-12)

SELMA Reporting

selma

Vuosiraportti 2009

ETL — analyse²

KOKONAISMARKKINA		Milj.Kg	Vol.Keh
		Milj.Eur	Arvo Keh.
		Milj.Kg	Vol.Keh
		Milj.Eur	Arvo Keh.
SELMA YRITYS	M-Os.	Vol.	Milj.Kg
	M-Os.	Arvo.	Milj.Eur
			Vol.Keh
			Arvo Keh.

LEIPOMOTUOTTEET	M-Os.	Milj.Kg	Vol.Keh
	M-Os.	Milj.Eur	Arvo Keh.
SELMA YRITYS	M-Os.	Milj.Kg	Vol.Keh
	M-Os.	Milj.Eur	Arvo Keh.

KUIVATUOTTEET	M-Os.	Milj.Kg	Vol.Keh
	M-Os.	Milj.Eur	Arvo Keh.
SELMA YRITYS	M-Os.	Milj.Kg	Vol.Keh
	M-Os.	Milj.Eur	Arvo Keh.

MAITOTALOUSTUOTTEET	M-Os.	Milj.Kg	Vol.Keh
	M-Os.	Milj.Eur	Arvo Keh.
SELMA YRITYS	M-Os.	Milj.Kg	Vol.Keh
	M-Os.	Milj.Eur	Arvo Keh.

TUOREET LEIPOMOTUOTTEET	M-Os.	Milj.Kg	Vol.Keh
	M-Os.	Milj.Eur	Arvo Keh.
SELMA YRITYS	M-Os.	Milj.Kg	Vol.Keh
	M-Os.	Milj.Eur	Arvo Keh.

AAMIAISTUOTTEET	M-Os.	Milj.Kg	Vol.Keh
	M-Os.	Milj.Eur	Arvo Keh.
SELMA YRITYS	M-Os.	Milj.Kg	Vol.Keh
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RUOANLAITTO	M-Os.	Milj.Kg	Vol.Keh
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SELMA YRITYS	M-Os.	Milj.Kg	Vol.Keh
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LEIPOMOPAKASTEET	M-Os.	Milj.Kg	Vol.Keh
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RAPEAT LEIVÄT	M-Os.	Milj.Kg	Vol.Keh
	M-Os.	Milj.Eur	Arvo Keh.
SELMA YRITYS	M-Os.	Milj.Kg	Vol.Keh
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LISUKKEET	M-Os.	Milj.Kg	Vol.Keh
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KEKSIT	M-Os.	Milj.Kg	Vol.Keh
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Level 1
Free annual report

- Monthly information for participating companies
- Information on own product areas and total market

Elintarviketeollisuusliitto



SELMA Reporting

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Vuosiraportti 2009

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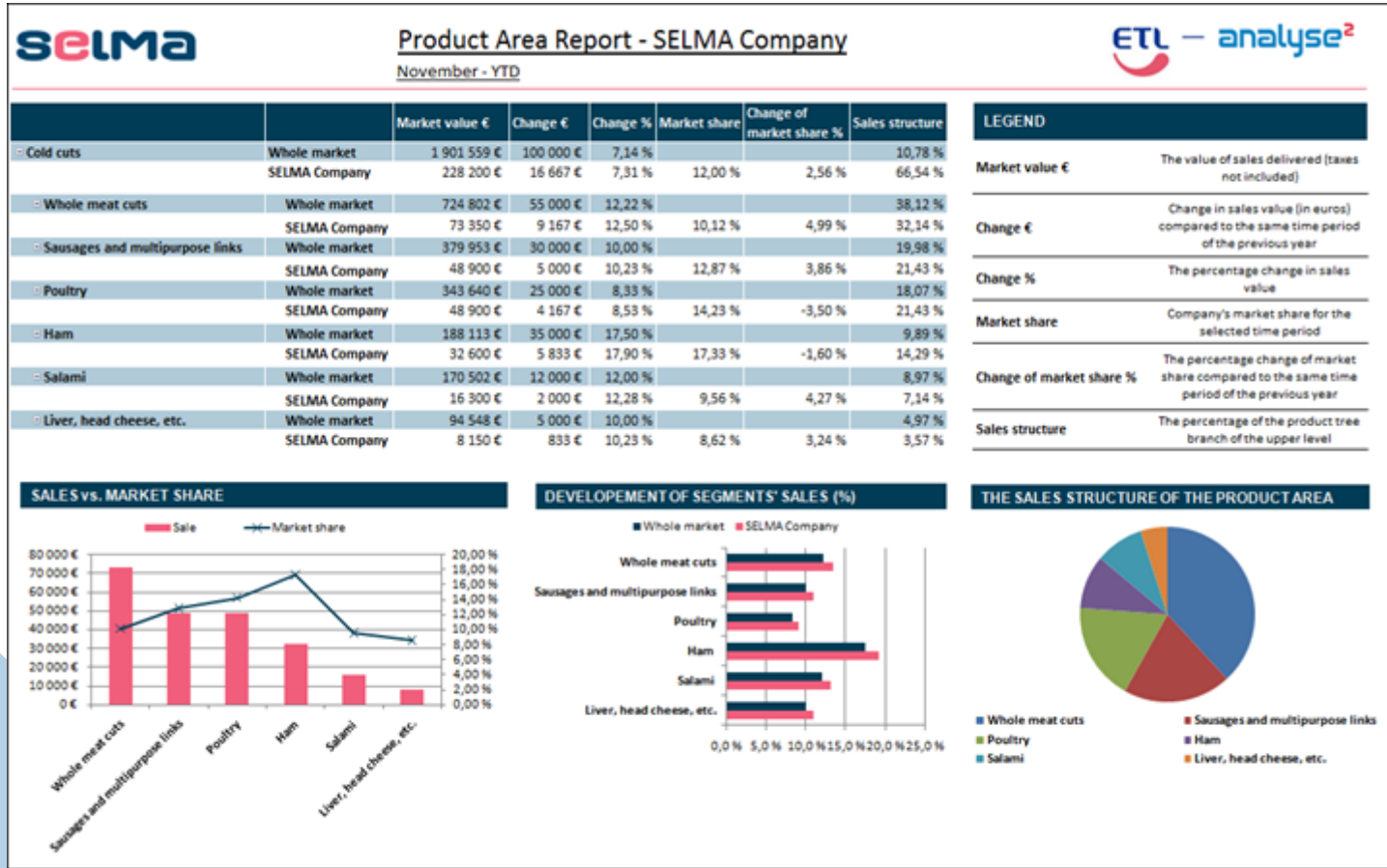
Level 2

Fee-based Basic reporting

- Turnover-based user fee
- Annual and monthly reporting

SELMA Product field report model

Monthly reporting year to date (example)



Basic report user fees for companies providing information

Turnover class	Company turnover in Finland	Basic report user fee/year
1	> 100 million €	25,000 €
2	50–100 million €	17,000 €
3	25-50 million €	10,000 €
4	10–25 million €	6,000 €
5	5–10 million €	4,000 €
6	5–2 million €	3,000 €
7	< 2 million €	1,000 €

Other fees

- One-time membership fee - 50% of the user fee
- Product category tree fee, which is divided among companies providing information for the product tree. Fees for the product tree are specified on a case-by-case basis.

Additional information on SELMA

- SELMA website www.etl.fi/selma
- Contact persons
 - General information on SELMA: heli.tammivuori@etl.fi
 - Transfer of information, value added services: juhani.nummi@analyse2.com

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