

# Rank and name

**PART 3** HILDEGARD M. KEIL TRIED TO GIVE AN IDEA OF THE TURNOVER OF THE LARGEST COMPANIES IN THE BAKING INDUSTRY. FOR AN OVERVIEW, A TABLE LISTS UP THE COMPLETE RANGE. THE FIRST TWO PARTS OF THE ARTICLE WITH THE TOP 24 COMPANIES IN 2012 WERE PUBLISHED IN BAKING+BISCUIT INTERNATIONAL, ISSUES 1-2013 AND 2-2013

## 25 Sodebo SAS

*Saint-Georges-de-Montaigu (France)*



The Sodebo family business in the Vendée region manufactures 2m pizzas and 1.7m sandwiches every week, and according to its own statements everything needed for this, irrespective of whether it's pizza dough, bread, ham or sauces, is produced in their own factories. The same also applies to pasta, wraps, "galettes", ready-made meals and soups. Estimated annual sales in 2011 were EUR 385m. It is scarcely possible to distinguish how much of this is ultimately accounted for by baked goods.

## 26 Europastry S.A.

*Barcelona (Spain)*



Europastry describes its business area as the professional production and distribution of frozen baked goods to bakeries, hotels and caterers and to the food retail. Products are sold under the brands Fripan, Frida, Dots and Yaya Maria. The group also has its own chain of shops in Spain under the name El Molí Vell. Turnover in 2010 was EUR 370m. Europastry operates a total of eleven factories on the Iberian Peninsula and employs a workforce of 2,500. About 15% of the production volume is exported to more than 20 countries. 80% of Europastry's capital is controlled by the Gallés family, 18% by the Spanish MCH Private Equity, and 2% is in the hands of the management.

## 27 Coppenrath & Wiese

*GmbH & Co KG Osnabrück (Germany)*



The children of Aloys Coppenrath, who recently passed away, are today the sole owners of the business which he founded together with his cousin Josef Wiese in 1975 to produce frozen flans. The product range was expanded long ago to include cakes, desserts, sheet cakes, mini-pastries, bread rolls and baguettes. When the first almost fully baked frozen bread rolls appeared in the food retail's freezers in 1997 under the name "Unsere Goldstücke" (Our Gold Pieces), it not only caused great excitement in the baking industry but also ensured that bake-off bread rolls from the freezer became the standard in Germany. Products are exported to almost all the European countries as well as to the USA and

Australia. The company quotes its turnover in 2011 as approx. EUR 370m, which is thus 11% higher than the previous year. It says the growth drivers accounting for the positive development in sales were mainly new products, e.g. confectionery desserts. About 3% of the turnover is attributable to the export business.

## 28 CSM N.V.

*Diemen (the Netherlands)*



CSM (abbr. for Centrale Suiker Maatschappij, Central Sugar Company) was not really a baker but a supplier to the baking industry and at the same time the biggest in the world! Today it only has a business division named Purac concerned with lactic acid and biotechnology, as the company sold its bakery supplies business in the end of March 2013. In 2011 Purac contributed EUR 407m to the group's sales of around EUR 3.1bn. Bakery Supply North America yielded EUR 1.628bn, and Bakery Supply Europe EUR 1.078bn. This also included the sales which the company makes with frozen baked goods, e.g. those that appear in the display counters of the McCafés (part of McDonald's Corporation, USA). This turnover was estimated to be around EUR 350m per year.

## 29 Continental Bakeries B.V.

*Dordrecht (the Netherlands)*



The business belongs to the Dutch investors group NPM Capital and operates 14 factories distributed across Europe in which it manufactures toast, snacks, biscuits, cookies, rice cakes, zwieback and other baked goods. Its brands include Haust, Hig, Auer, Brink, Bussink, Pirou, Brinky, Stieffenhofer and Gille. In addition the company is strongly focused on the manufacture of private brands. Turnover in 2011 was EUR 345m. The Dutch cartel authority recently rejected the request by Continental Bakeries to take over the zwieback manufacturer Bolletje and/or its parent company A.A. ter Beek B.V.

## 30 Pågen AB

*Malmö (Sweden)*



According to information from the company itself, the family business Pågen AG has a turnover of SEK 2.7m, equivalent to around EUR 313m. The company produces fresh bread, small pastry rolls traditionally flavored with cinnamon but nowadays also with saffron or vanilla, muffins and the classical Swedish zwieback-like bread roll halves ("klämma"). Different wholegrain varieties are now available, in addition to the traditional variant spiced with cardamom.

### Author

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### 31 Bimbo Iberia

Madrid (Spain)

Bimbo Iberia owns eight production sites and 57 distribution centres on the Iberian Peninsula and Grand Canary. The Mexican bakery multi Grupo Bimbo S.A.B de C.V., Mexico City, Mexico, bought back the European offshoot in October 2011 from the US-American group Sara Lee (now with the Hillshire Brands Company, Chicago). Bimbo Iberia was founded about 50 years ago by Jaime Jorba, a co-founder of the Bimbo bakery in Mexico, and had been acquired by Sara Lee in 2001. The factories are situated in Albergaria-a-Velha (Portugal), Palma de Mallorca, Solares (Autonomous Community of Cantabria), Azuqueca de Henares (Autonomous Community of Castile-La Mancha, Province of Guadalajara), Madrid, Granollers (Autonomous Community of Catalonia, Province of Barcelona), El Verger/Vergel (Autonomous Community of Valencia, Province of Alicante) and Agüimes (Grand Canary, Province of Las Palmas). The Mexican parent group made sales of MXN 133.7bn in 2011, equivalent to around EUR 8bn. In the total period of 28 days belonging to the parent group, the Annual Report shows sales for Bimbo Iberia in 2011 of MXN 393m, equivalent to around EUR 23.5m, but simultaneously a loss of MXN 80m (approx. EUR 5m), just under 20% of the turnover. At the time of the sale there was talk of an expected annual turnover for Bimbo Iberia of approx. EUR 296m. Plants are located in Albergaria (Portugal), Palma de Mallorca, Solares (Cantabria), Azuqueca de Henares (Guadalajara), Madrid, Granollers (Barcelona), Vergel (Alicante) and Agüimes (Gran Canaria).



### 32 Groupe Limagrain Holding S.A.

Chappes (France)

Limagrain is a group with international operations. It was formed in 1942 from an agricultural cooperative in the Auvergne, and today it produces cereal, vegetable and flower seed for both commercial and private use, and special and function flours. With the Jacquet and Brossard brands, Limagrain claims to be France's third largest baked goods manufacturer, with a market share of 16.8%. Limagrain's worldwide group turnover in the financial year 2011/12 (July 2011 to June 2012) was EUR 1.784bn. EUR 277m of this is accounted for by the baked goods division, corresponding to a turnover increase compared to the previous year of 9% on a constant basis. In volume terms, Jacquet achieved growth of 18% in the financial year 2011/2012. Contributions to this came both from sandwiches and from special breads, including newly introduced lines such as the Jacquet Caractère toast bread manufactured without additives and palm oil ("a toast bread with character") and ApéroGril, filled baked pastry slices that are baked crisp after 2 min in a toaster, broken into narrow strips and served with aperitifs. On the other hand, according to the annual financial statements, the cake manufacturer Brossard achieved the previous year's level in the fiercely contested French cake market.



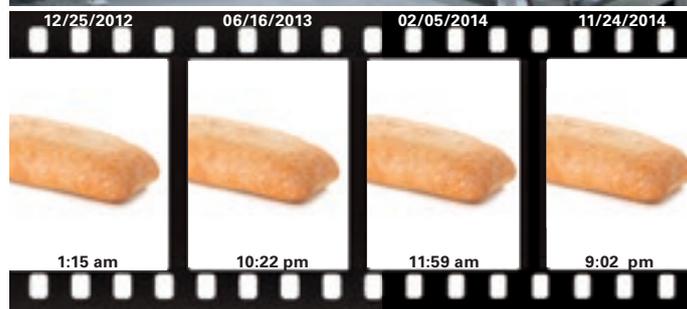
### 33 Glockenbrot Bäckerei

GmbH & Co.oHG Frankfurt am Main (Germany)

Every day the Glockenbrot bakery produces more than 400 kinds of baked goods for the Rewe, Penny and Toom stores of ►



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Table 1: Europe's biggest bakeries

Company	Based in	Group sales	Sales of baking division in Europe	Comments
Barilla Holding S.P.A.	Italy	EUR 3.916bn	> 1,500	
Aryzta Europa (2012)	Switzerland	EUR 2.9bn	1,300	
Premier Foods plc	Great Britain	GBP 2bn (approx. EUR 2.31bn)	843	
Associated British Foods plc (Allied Bakeries)	Great Britain	GBP 12.3bn (approx. EUR 14.21bn)	800	
Lantmännen Unibake A/S	Denmark	SEK 36bn (approx. EUR 4.18bn)	780	
Harry-Brot GmbH	Germany		738	
Greggs plc	Great Britain	GBP 701m (approx. EUR 810m)	723	External sales of a stores chain
Fazer Group	Finland	EUR 1.575bn	700	
Neuhauser S.A.	France		655	Including LeCrobag
Vandemoortele N.V.	Belgium	EUR 1.273bn	650	Including Panavi
Vivescia (Délifrance, Krabansky etc.)	France	EUR 4bn	600	
Warburtons Ltd	UK	GBP 495m (approx. EUR 572m)	594	
Pasquier S.A.	France		548	
Le Groupe NORAC	France		500	
Grupo Panrico	Spain		563	Artiach sales still included
Jowa AG	Switzerland	CHF 682m (approx. EUR 551m) + EUR 1.85m	553	
Chipita International S.A.	Greece		500	
Grupo Siro	Spain		489	
Group Holder	France		488	Including restaurant sales
La Lorraine Bakery Group	Belgium		480	Including restaurant sales
Bakkersland B.V.	Netherlands		450	
Bauli Group	Italy		412	
Vaasan Group	Finland		408	
Groupe Le Duff	France	Group EUR 1.2bn	400	Estimated contribution of baked goods to total sales
Sodebo SAS	France		385	Including sales of convenience foods etc.
Europastry S.A.	Spain		370	-2010
Conditorei Coppenrath & Wiese GmbH & Co. KG	Germany		370	
CSM N.V.	Netherlands	EUR 3.1bn	350	
Continental Bakeries B.V.	Netherlands		345	
Pagen AB	Sweden		313	
Bimbo Iberia	Spain	MXN 133,7bn (approx. EUR 7.74bn)	296	
Limagrain Group	France	EUR 1.784bn	277	
Glockenbrot Bäckerei GmbH & Co.oHG	Germany	EUR 48.4bn	270	
K&U Bäckerei GmbH	Germany	EUR 7.1bn	268	
Finsbury Food Group	Great Britain	GBP 207m (approx. EUR 239m)	254	
Schäfer's Brot und Kuchen-Spezialitäten GmbH	Germany	EUR 6.92bn	253	
Kuchenmeister GmbH	Germany		240	
Grupo Dulcesol	Spain		235	
Grupo Berlys	Spain		220	Including restaurant sales
Coop Genossenschaft	Switzerland	CHF 260m (approx. EUR 210m)	210	
Maison Ménéssiez S.A.	France		200	

the Rewe Group (REWE-Zentral-Aktiengesellschaft, Cologne), whose subsidiary it is. Production takes place in Frankfurt am Main, Berghem near Cologne, in a new factory at Bergkirchen near Munich and in the bakery of the Bäckerei Rothermel in Östringen near Heidelberg that was taken over in 2009. Turnover rose by 19% in 2011 to EUR 270m. The group's 355 bake-shops together with the Bäckerei Rothermel increased their sales in 2011 by 3.2% to EUR 92m. That seemed very little, but became no bigger despite a reassuring demand. The explanation: the area of the shops is said to be very limited. Glockenbrot has been testing a new shop type at Frankfurt airport since mid-2011, combining a glass-enclosed bakery, baked goods sales and a restaurant.

### 34 K&U Bäckerei GmbH



Neuenburg am Rhein (Germany)

The K&U Bäckerei belongs to the EDEKA Handelsgesellschaft Südwest mbH and from four production factories it supplies more than 700 Edeka sales outlets in south-west Germany. K&U operates 467 branches under its own name. In addition K&U has handed over 16 branches to franchisees and also operates 49 self-service branches under the name Schwarzwaldbrot GmbH, as well as baking operations in Reutlingen, Hitzingen (Constance district) and as Bäckerbub in Mannheim. These production sites supply mainly the branches of the K&U bakery, the self-service branches of the Schwarzwaldbrot, which are regionally connected and also belong to K&U, and in addition retail businesses and third party customers to a small extent. Frozen pretzels are also manufactured on an industrial scale in Reutlingen, turnover in 2011 according to the Edeka-Zentrale Südwest annual financial statements EUR 247m. The Bäckerhaus Ecker GmbH, Homburg Saar, which Edeka Südwest took over in 2010, enabled expansion into the Saarland and into the Rhineland-Palatinate. In 2011 the 53 Bäckerhaus-Ecker branches achieved sales of EUR 21.1m, bringing the total baked goods turnover of the K&U Bäckerei to more than EUR 268m.

### 35 Finsbury Food Group plc

Cardiff (UK)



According to their own statement, the Finsbury Food Group is the second largest supplier of cake to the UK's multiple grocers and its also manufactures small amounts of bread and gluten-free products, achieved total sales of GBP 207m (approx. EUR 242.1m) in the past financial year ending on 30<sup>th</sup> June 2012. This was thanks to a 9.2% growth in the cake division and a more than 10% turnover increase for the gluten-free and special breads segment to the present GBP 55m (approx. EUR 64.3m). ▶

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### 36 Schäfer's Brot und Kuchen-Spezialitäten GmbH

Porta Westfalica (Germany)



The cooperative structure of the trading group EDEKA ensures that what exists is not “the” Edeka but many independent single traders who obtain the majority of their product range from seven Edeka regional companies (rather like wholesalers). The latter in turn purchase from the headquarters in Hamburg and bill through the latter. All the Edeka regional companies except Edeka Hessenring, i.e. Edeka Minden-Hanover, then Edeka South-west, Edeka Rhine-Ruhr, Edeka Southern Bavaria and Edeka North, have their own bakeries. The biggest of these Edeka bakeries is Schäfer's Brot und Kuchen-Spezialitäten GmbH in Porta Westfalica (North Rhine-Westphalia), which was taken over in the 1970s by the regional company Edeka Minden-Hannover. It owns the brands of the Schäfer's Brot (with 900 branches in the Minden-Hannover region) with the Konditorei Meffert (35 branches in the Hanover region) and the Bäckerei und Konditorei Thürmann (approx. 200 branches in the Berlin area) and with the 15 branches of Der Leinebäcker (Hanover). Production takes place mainly in the three bread factories at Lehrte near Hanover, Teutschenthal near Halle/Saale and the Brotfabrik Thürmann (Berlin) as well as at the following locations: Porta Westfalica and Osterweddingen, a district of the town of Sülzetal to the south of Magdeburg. Supplies go to 870 branches, of which 714 sell their goods in the check-out zones of Edeka markets. Sales of Schäfer's Brot increased in 2011 by 2.8 % to EUR 250.3m. In late 2012 the Edeka regional company Minden-Hannover announced that it would like to divest the Schäfer's branches to the independent market operators, and the 156 independent businesses to employees on the spot. However it said it wanted to keep the production facilities, the site in Osterwedding currently being converted to produce frozen dough pieces.

### 37 Kuchenmeister GmbH

Soest (Germany)



Kuchenmeister GmbH in Soest, North Rhine-Westphalia, is Number 1 in the German table-ready cake market with total annual sales of EUR 240m in 2011. The family business manufactures around 90,000 t of baked goods with 1,000 employees at three sites.

### 38 Dulcesol/Dulcesa S.A.

Villalonga (Spain)



The group started as a small family business with traditional bread and cake shops in Villalonga (Valencia). In 2011 Dulcesol produced muffins, puff pastries, cakes, biscuits/cookies, fine baked goods, donuts and bread on a total of 16 production lines with 562 employees in two factories (in Gandia and Villalonga, both in the province of Valencia), totalling 106,000 t. Dulcesol also keeps just under half a million hens for egg production, of which 75 % is used in its own bakeries. It also has its own printing press that manufactures itself all the plastic films used in the bakery, amounting to at least 1,725 t in 2011. Group sales in 2011 were EUR 235m.

### 39 Berlys S.A.

Madrid (Spain)



Berlys operates seven factories in Spain (Mutilva, Sarriguren, Tafalla and Tajonar, all in the province of Navarra; Noblejas, province of Toledo; Alicante, Autonomous Community of Valencia; Palma de Mallorca) in which it produces frozen baked goods, and five to produce fresh baked goods, sometimes at the same site. The Berlys Group also owns around 180 shops in the Basque country, appearing under various names such as Horno Artesano, Taberna, Las Gaviota or Tahonas. They sell bread, and some of them also sell a full range of delicatessen. The majority also offer coffee and snacks. In addition Berlys has held the majority of the share capital in the Portuguese frozen products baker Nutriva in Coimbra (Centro Region) since July 2010. In 2011 Berlys achieved sales of EUR 220m with fresh and frozen baked goods. Today the founding family is only a minority shareholder, and 53 % of the capital belongs to the finance company Mercapital and 36 % to the investment group Artá Capital.

### 40 Coop Genossenschaft

Basel (Switzerland)



Coop Schweiz is the second big name in the food retail in Switzerland. It operates seven major industrial bakeries and five industrial confectioners together with 37 in-store bakeries, 29 of them in so-called megastores. On average the Coop's in-store bakeries supply around 40 % of total baked goods sales (calculated including zwieback, crackers etc.). This figure is up to 70 % in the bread segment, depending on the location, and even up to 95 % in the confectionery area in western Switzerland. The bread product range generates 60–65 % of the sales of the in-store bakeries, confectionery articles 15–20 %, and the remaining 15–20 % originates from small baked goods that are delivered frozen from the central bakeries and are baked-off here. At the same time the in-store bakeries fulfil more than just a supplier function for the respective store. They are equally important for the store's image and attractiveness. Because many of the in-store bakeries are located in supermarkets situated outside the densely populated areas, demand is concentrated at the end of the working day. Half of the sales of bread take place after 4 pm. Market experts estimate the total turnover to be CHF 260m, equivalent to around EUR 210m.

### 41 Maison Ménéssiez SAS

Feignies (France)



The family business, founded in 1965 and now in the second generation, is managed by Laurent Ménéssiez. The company specializes in a whole spectrum of different baguettes, including high-quality products baked in a stone oven. The baguettes and baguette rolls are available both frozen and pre-baked and packed in a protective atmosphere. Maison Ménéssiez now makes about half of its turnover, which is estimated at EUR 200m, from exports, mainly to the surrounding European neighbour countries. +++

— This was the third and last part of the market sequence.