

**DATAMONITOR
PROFILES CONTENT
SEPTEMBER 2005**

Industry Profiles / Branchenprofile

DATAMONITOR

Branchenprofile:

(\$200)

Branchenprofile beinhalten Marktdaten der weltweit führenden Industriezweige und Konsumentenmärkte. Mithilfe von Primär- und Sekundärrecherchen werden die Daten gesammelt, aggregiert und analysiert. Alle Branchenprofile enthalten:

- Marktumsatz / Marktvolumen
- 5-Jahresprognosen
- Marktanteile, Trendanalysen
- Wettbewerbsumfeld
- Kurzportraits der Hauptwettbewerber*
- Informationen zu den Vertriebskanälen.

*Alle hier genannten Unternehmen sind als einzelne Firmenprofile erhältlich.

MARKET SEGMENTATION I DATAMONITOR

CHAPTER 3 MARKET SEGMENTATION I

The compact car sector is the leading revenue source for the German car rental market, generating 40.7% of revenues.

The intermediate car sector forms a further 27.8% of Germany's market value, while the rental of economy cars accounts for a further 16.6%.

Table 2 - Germany Car Rental Market Segmentation I, % \$ 2003

Category	% Share
Compact	40.70%
Intermediate	27.80%
Economy	16.60%
Premium	8.60%
Luxury	1.90%
Other	4.40%
Total	100.0%

Source: Datamonitor

Figure 2 - Germany Car Rental Market Segmentation I, % \$ 2003

Source: Datamonitor

Germany - Car Rental
© Datamonitor (Published November 2004)

LEADING COMPANIES DATAMONITOR

CHAPTER 6 LEADING COMPANIES

6.1 Avis Europe plc

Avis Europe is a car rental company operating in Europe, Africa, the Middle East and Asia, under an exclusive license until 2009. For the fiscal year ended December 2003, the company reported total revenues of \$1.3 billion, a decrease of 1.1% on the previous year.

Avis Europe operates through its network of some 3,100 locations in 111 countries. The network operates through wholly owned subsidiaries in 10 countries, which are complemented by licence arrangements in a further 97 countries.

The Budget brand, acquired by Avis Europe in March 2003 through around 900 locations in 62 countries. These are pre-businesses with corporate operators in Austria and Sweden, a small number of locations in France and the UK.

Avis Europe is headquartered in Bracknell, UK.

6.2 Europcar International S.A.

Europcar is a leading global car rental company with a fleet of over 1 million vehicles in 188 different countries. Europcar was founded in Paris in 1973 and is a wholly owned subsidiary of the German car manufacturer Volkswagen.

6.3 The Hertz Corporation

The Hertz Corporation is the world's largest car rental firm, with a fleet of over 1 million vehicles in 150 countries and a fleet of around 525,000 vehicles. In December 2003, the company generated sales of \$5.2 billion.

Hertz is a wholly owned subsidiary of the Ford Motor Company, headquartered in Park Ridge, New Jersey.

Germany - Car Rental
© Datamonitor (Published November 2004)

MARKET FORECASTS DATAMONITOR

CHAPTER 7 MARKET FORECASTS

7.1 Market Value Forecast

In 2003, the German car rental market is forecast to have a value of \$2.2 billion, a decrease of 8.7% since 2003. The compound annual rate of change of the market in the period 2003-2008 is predicted to be -1.8%. Despite some decline, the market is forecast to grow in the 2003-2008 period. The largest growth is expected in 2008 when the market will increase by 2.5%.

Table 4 - Germany Car Rental Market Value Forecast: \$ billion, 2003-2008

Year	\$ billion	€ billion	% Growth
2003	2.4	2.1	-4.60%
2004	2.1	1.9	-6.50%
2005	2.1	1.8	-3.20%
2006	2.1	1.8	0.20%
2007	2.1	1.9	1.40%
2008	2.2	1.9	2.50%
CAGR, 2003-2008:			-1.8%

Source: Datamonitor DATAMONITOR

Figure 4 - Germany Car Rental Market Value Forecast: \$ billion, 2003-2008

Source: Datamonitor DATAMONITOR

Germany - Car Rental
© Datamonitor (Published November 2004) Page 15

Global Industry Guides / Branchenführer

DATAMONITOR

Industry Guides:

(\$795-\$995)

Datamonitors Global Industry Guides liefern Marktanalysen der weltweit größten Industrie- und Konsumgütermärkte.

Die Guides beinhalten Daten zur Marktgröße, zu Trends & Entwicklungen, Wettbewerbern sowie Zukunftschancen der jeweiligen Branche in verschiedenen Ländern, bzw. Regionen: Nordamerika, Europa und Asien-Pazifik, sowie Deutschland, Frankreich, UK, USA, Japan, bzw. Italien, Spanien, Kanada, China, Belgien, Niederlande.

WIRELESS TELECOMMUNICATION SERVICES IN JAPAN

Market Segmentation

Japan accounts for 39.7% of the Asia-Pacific wireless telecommunications services market's value.

China generates a further 43.9% of the region's revenues.

Table 73: Japan Wireless Telecommunication Services Market Segmentation: % Share, by Value, 2004

Geography	% Share
China	43.90%
Rest of Asia-Pacific	16.42%
Total	100.0%

Source: Datamonitor

Japan Wireless Telecommunication Services Market Segmentation: % Share, by Value, 2004

Source: Datamonitor

Wireless Telecommunication Services: Global Industry Guide © Datamonitor Reference Code: QHEC4827 Page 107

WIRELESS TELECOMMUNICATION SERVICES IN ASIA-PACIFIC

Market Value

The Asia-Pacific wireless telecommunication services market grew by 29.4% in 2004 to reach a value of \$200.2 billion.

The compound annual growth rate (CAGR) of the market in the period 2000-2004 was 35.9%.

Table 6: Asia-Pacific Wireless Telecommunication Services Market Value: \$ billion, 2000-2004

Year	\$ billion	% Growth
2000	58.7	45.00%
2001	86.6	47.00%
2002	116.3	35.00%
2003	154.7	33.00%
2004	200.2	29.40%

CAGR, 2000-2004: 35.9%

Source: Datamonitor

Figure 6: Asia-Pacific Wireless Telecommunication Services Market Value: \$ billion, 2000-2004

Source: Datamonitor

Wireless Telecommunication Services: Global Industry Guide © Datamonitor Reference Code: QHEC4827 Page 34

COMPANY PROFILES

Deutsche Telekom AG

Company Overview

Deutsche Telekom is a telecommunications company providing mobile communications, Internet, fixed-line networks, and system solutions. The company operates nationally and internationally through a number of subsidiaries in about 65 countries. Deutsche Telekom is headquartered in Bonn, Germany and employs about 245,000 people.

The company recorded revenues of €37.9 billion during the fiscal year ended December 2004, an increase of 3.7% over 2003. The increase was primarily attributable to the new customers in the mobile services division. The operating profit of the company during fiscal 2004 was €9.9 billion, an increase of 81.5% over fiscal 2003. The net profit was €4.6 billion during fiscal year 2004, an increase of 254% over 2003.

Key Facts

Table 118: Deutsche Telekom AG Key Facts

Head Office:	Deutsche Telekom AG Friedrich-Ebert-Allee 140 53113 Bonn Germany
Phone:	49 228 181 0
Fax:	49 228 181 5872
Web Address:	http://www.telekom.de
Turnover (\$ Mil):	57,900
Financial year-end:	December
Employees:	245,045
Ticker:	DTG
Stock Exchange:	Frankfurt

Source: Datamonitor

Wireless Telecommunication Services: Global Industry Guide © Datamonitor Reference Code: QHEC4827 Page 173

Datamonitor Case Study

DATAMONITOR

Case Studies:

(\$295)

Datamonitors Case Studies untersuchen erfolgreiche Geschäftspraktiken von Unternehmen mit besonders beispielhaften Produkt- und Marketingstrategien. Der Schwerpunkt liegt hierbei auf der Konsumgüterbranche.

Food and drink case studies **DATAMONITOR**

CASE STUDIES

Go-co bars – creating a new product segment

Go-co bars have been launched by trend-spotting company Esperientia with the expectation of creating a new segment for performance-enhancing energy bars. What is very innovative about the approach taken by Esperientia is the use of 'word of mouth' promotion, based on identifying and promoting to the 'influencers of the target audience'.

Go-co bars are milk chocolate bars that contain a dose of guarana. About 120 - 130 mg of guaraninall caffeine is provided by a combination of natural powdered Guarana and Guarana extract in each bar. As such, it is expected that one bar will have about one and a half times the effect of a can of Red Bull, which contains an 80mg dose of guaranine (the guaranine content of Go-Co bars was actually toned down from 180mg).

Figure 1: Go-co bars



Source: Datamonitor, "Targeting the Individual" **DATAMONITOR**

Go-co bars were initially distributed in bars and clubs, although distribution is expanding to include retail outlets in metropolitan areas, particularly through convenience channels. The bars sell for between 50p and 75p each through off-trade channels and £1 each for on-trade. For on-trade outlets, Go-co bars are appealing not just as an additional product that can be sold at high margin, but also because it is entirely complementary to drink sales.

Food and drink case studies **BPCS10**
© Datamonitor (Published 05/2004) **Page 8**
This brief is a licensed product and is not to be photocopied

Food and drink case studies **DATAMONITOR**

Figure 2: Live theatre cooking in colleges



Source: Datamonitor, "Targeting the Individual" **DATAMONITOR**

Mecca Cola – new marketing opportunity in politics

Mecca Cola provides a strong example of how political events that stir strong feeling in consumers can translate into a new market opportunity. The product has the strap line "Don't drink stupid, drink with commitment", as an alternative to drink brands that the consumer may wish to avoid due to personal, political, ethical or other reasons or beliefs.

Mecca Cola was launched by French entrepreneur, Tawfik Mathout on 6 November 2002. By the following February (2003), monthly sales had reached 11 million bottles - mainly through small shops, but also by the large supermarkets Auchan and Champian in some of their suburban stores. The product is distributed in countries around the world, including the UK, Belgium, Germany, Sweden, Italy, Switzerland, Morocco, Senegal and Libya.

Food and drink case studies **BPCS10**
© Datamonitor (Published 05/2004) **Page 12**
This brief is a licensed product and is not to be photocopied

Food and drink case studies **DATAMONITOR**

Figure 4: Mecca Cola - "Don't drink stupid, drink with commitment"



Source: Datamonitor, "Targeting the Individual" **DATAMONITOR**

Marketing to the masses

Despite being named after the birthplace of Muhammad, Tawfik maintains "Mecca Cola is not a Muslim cola". Mecca Cola is a protest against the policies of U.S. Bush administration. In fact, Tawfik hopes that Mecca Cola will become popular amongst people of any religion. This is in contrast to the approach taken by Otsda Cola in the UK, which does define itself as an Islamic cola, and donates 10% of profits to Islamic charities in the third world. However, such positioning is certain to constrain Otsda to small local shops in areas with large populations of ethnic minorities, while Mecca Cola has a good chance of appealing to the mainstream consumer. Mecca Cola donates 10% of profits to European NGOs and 10% of profits to Palestinian charities in Palestine. Tawfik ensures that the money is used for humanitarian purposes, by sending goods rather than cash. If a direct donation is made then this is done through an international organisation such as the UNHCR Children's Fund.

The anti-war march in London, prior to the war on Iraq, involved more people than any previous demonstration in the capital, even though the UK government was the United States' government's primary ally in any invasion of Iraq. The strength of

Food and drink case studies **BPCS10**
© Datamonitor (Published 05/2004) **Page 13**
This brief is a licensed product and is not to be photocopied

Datamonitor MarketWatch (Monthly News & Research)

DATAMONITOR

MarketWatch:

(\$200)

Datamonitors MarketWatch Reihe bietet eine nützliche Quelle für Entscheider unter Zeitdruck. Monatliche Übersichten und Einblicke durch News, Analysen und Meinungen zu aktuellen Branchentrends, u.a. Mergers & Acquisitions, Marketing, Gesetzesänderungen und Entwicklungen.

Erhältlich für:

- Automotive (Automobil)
- Food (Ernährung und Lebensmittel)
- Drinks (Getränke)
- Energieversorgung und Management
- Finanzwesen / Finanzdienstleistungen
- Technologie (ICT)
- Telekommunikation
- Persönliche Pflegeprodukte (Kosmetik)
- Krebs
- CNS (Central Nervous System)
- BioTech

Country	Import Volume (million cubic meters)
France	~100,000
Germany	~60,000
Italy	~40,000
Netherlands	~20,000

Category	Details
Head Office	Statoil ASA, Forusbean 50, 4050 Strömberg, Norway
Website	www.statoil.com
Telephone	47 51 99 00 00
Fax	47 51 99 00 00
Turnover (€ Mn)	30,354
Employees	18,238
Financial Year End	December
Market	OTC
Stock Exchange	Oslo

Strengths	Weaknesses
Strong financial performance	Declining revenues from Europe
Market leader	Average daily oil production in ESP Norway decreased
Focus on research and development	Increasing selling, general and administrative expenses
Opportunities	Threats
Large contract work	Maturing Norwegian continental shelf (NCS)
Statoil's natural gas division is well positioned in US & Europe	Zero discharge regulations
Expanding exploration activities	Highly competitive market

- Country Profiles (\$100/€85)

DATAMONITOR
Country Profiles
 (\$100)

Datamonitors Länderprofile enthalten ausführliche Informationen zu Wirtschaft und Politik, sowie makroökonomische und demographische Daten der fünfzig größten Länder weltweit.

Inhalt:

- Einleitung
- Länderkennzahlen
- Wirtschaftsüberblick
- Politischer Überblick
- Wirtschaftsanalyse
- Politische Analyse
- Makroökonomische, demographische und soziale Indikatoren

