FOOD FOR THOUGHT

CLASSIC MARKET DEMAND REPORT

All reports present the following sample tables for each country and product.

>> All tables are also available individually online for any combination of countries and products.

Food & Drink
Strategic Information Services

Ice Cream Markets

PRINTED REPORTS

All FFT online reports can be printed and photocopied recto-verso to produce a complete report.

Try printing this brochure !

SAMPLE REPORT
Note: Illustrative Data Only Presented

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FOREWORD

PRINTING YOUR REPORT

Print: Print the pdf copy of your report and ensure no "extra" white pages were inserted by your printer.

Photocopy: Photocopy the report recto-verso and insert it into a ring-folder.

Result: A complete report, including cover page, table of contents and correct left/right presentation of two-page tables (hence the occasional numbered blank pages in your report to

PRINT YOUR REPORTS

LEGAL, DISCLAIMER and COPYRIGHT

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Disclaimer: information published in this report, no liability whatsoever can be accepted for the contents or their accuracy.

Common definitions are applied to all country & product markets.

OVERALL DEFINITIONS

General: Market data refer to all products sold for **final** **human** **consumption** in retail, foodservice and artisanal markets (own-produced for own sale, e.g. independent bakers), thus excluding industrial and intermediate consumption, and auto-consumption.

Product: All product markets are carefully defined so as to be comparable across all countries. Special cases in a few country and product markets are specified.

Prices: Retail prices (including VAT, excise and other indirect taxes) and foodservice buy-in prices are applied throughout.

Retail and foodservice buy-in prices are applied throughout.

METHODOLOGY

All countries are surveyed in the field regularly, during which extensive company and other interviews are carried out. FFT also systematically gathers all publicly available data (from trade associations, government institutions and publications, the press and other media). The definition above (final human consumption) ensures that there is no double-counting among product markets. In turn, this enables comparisons across all country/product markets on a per capita or unit value or real growth basis, and allows all data to be summed by product, by country, or by category, allowing extensive cross-checking for verisimilitude.

There are NO data gaps !

FULL COVERAGE

There are NO gaps. Volume, Value and Company Market Share data are provided for ALL country and product markets. FFT provides its own carefully assessed estimates in the absence of any available data source.

DATA COLLECTION PRINCIPLES

Since the 1990 1st edition, FFT has developed a "fail-safe" methodology as far as possible to gathering data.

1- **End-Use Definition:** Final Human Consumption (see above). This ensures NO double-counting and that any and all data can be added up.
2- **Wide Coverage:** All demand & supply - including retail, foodservice and direct supply - provides a fixed frame into which all elements must fit in a logical manner.
3- **The 100% Rule:** Company market shares must add up to no more than 100%, and wide coverage means that all significant supplier market shares must be fitted in, squeezing many company claims!
4- **Cross-checking:** To ensure verisimilitude, extensive country comparisons are made of per capita consumption and expenditure, real growth rates, etc., and against 10-year historical trends. Data "outliers" are singled out, and if necessary re-checked in the field.
5- **Critical Review:** All publicly available data - the trade press, associations, government surveys, etc., are exhaustively collected & collated, and many amended or rejected, applying the above principles.
6- **Original Sourcing:** Extensive field surveys, company interviews and store checks are carried out every year, and all data is "fitted" to a realistic overall picture of total supply and demand.
7- **Software:** Complex, internally-developed computer programs provide a unique dynamic interlocking data grid.
8- **Russian Doll:** Internal consistency and coherence is provided by data adjusting automatically to data changes elsewhere.
9- **Client Feedback:** Continual improvements are incorporated in each annual edition at clients' suggestions and remarks, thus fine-tuning the database to market realities.
10- **Strategic View:** Presentation techniques favoring a global vision of food & drink markets are systematically applied.

ILLUSTRATED SAMPLES

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SAMPLES

The following pages show the ice cream market tables provided.

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FREE ONLINE ACCESS - PDF AND EXCEL

All the 584 product tables can be accessed individually online. Tables can also be produced for any combination of the 146 products and 3 countries, e.g. Ready Meal markets in Scandinavia, including calculations of the Total, Retail and Foodservice Markets, overall Consumption and Expenditure Per Capita, overall Growth Rates, etc.

VOLUME 1: TOTAL MARKET **9.1 ICE CREAM**

		Main Process Family:	Frozen
PRODUCT GROUP:	**ICE CREAM AND DESSERTS**	**Principal Meal Function:**	Dessert
Product:	Ice cream	**Dry Weight Conversion Factor:##**	0.75
Regional Forecasts:*	World 1.1%; North America: 0.7% (av. annual real values 2007-2012)		
Definition:#	Dairy/non-dairy ice cream and sorbets, industrial and artisanal (including estimates of underrecorded artisanal), soft ice.		

Regional Forecasts for North America

Full Product Definitions Provided, comparable across all countries.

114 Single Product Markets
and
32 Product Groups available

MARKET SIZE: VOLUME

Countries **	Total Markets: 2002 Total (million litres)	2006 Total (million litres)	2007 Total (million litres)	2007 Shares (per-cent)	2002-2007 Av. Annual Growth (per-cent) ##	2002-2007 Av. Annual Growth (litres)	Consumption Per Capita: 2002 (litres)	2007 (litres)	2002-07 Growth (average annual)***	Rankings: 2007 Total Mkt Size	2007 Per Capita Cons.	5-year Real % Market Growth
Canada	316.0	294.2	298.0	4.6%	-0.9%	- 3.60	10.11	9.07	-1.9%	2	2	2
Mexico	116.0	140.0	146.7	2.3%	4.7%	6.13	1.14	1.33	3.1%	3	3	1
United States	6 438.6	5 944.5	6 000.0	93.1%	-1.5%	- 87.72	22.12	19.80	-2.2%	1	1	3
Total	**6 870.6**	**6 378.7**	**6 444.7**	**100.0%**	**-1.4%**	**- 85.19**	**16.19**	**14.46**	**-2.3%**			

Any choice
from 3
countries possible

The matching report covering Europe covers an additional 22 countries.

MARKET POTENTIAL

Per Capita Consumption and
5-Year Trends

Online PDF and Excel access provided for any combination of products, countries and data

FAST MARKET ASSESSMENT
Country Rankings Point to Market Strengths and Weaknesses
(Relative Size/Strength/Growth)

COMPARE MARKETS !

COMPLETE AND COMPARABLE, RELIABLE AND UP-TO-DATE DATA, for ALL Country & Product Markets.
(There are no gaps!)

* Excludes the "quality" factor, i.e. assumes product continuity. US$pe covers 22 countries and North America (3 countries).

\# All data refer to total final human consumption, including retail, catering/foodservice and artisanal (own-produced for own sale, e.g. independent bakers), thus excluding industrial consumption and auto-consumption.

\## Applying full 6-Year regression analysis.

\## Single Product volume data is rounded up/down in Product Group tables (including several products) by the Ready-to-Eat/Drink Dry Weight Conversion Factor.

Source: Food for Thought

Note: Illustrative Data Only Presented

VOLUME 1: TOTAL MARKET

114 Single Product Markets and 32 Product Groups available

9.1 ICE CREAM

Frozen Dessert

PRODUCT GROUP: **ICE CREAM AND DESSERTS**

Product: Ice cream

Regional Forecasts:* World 1.1%; North America: 0.7% (av. annual real values 2007-2012)

Definition:# Dairy/non-dairy ice cream and sorbets, industrial and artisanal (including estimates of underrecorded artisanal), soft ice.

Full Product Definitions provided, comparable across all countries.

Regional Forecasts for North America

MARKET SIZE: VALUE

Countries **	Total Markets 2002 (Current US$ millions	2006 (Current US$ millions	2007 (Current US$ millions	2007 (Equivalent Local Currency millions)		2007 Shares (per-cent)	2002-2007 Av. Annual Growth (Real per-cent) ##	(Current US$ m.) **	Exp. Per Capita (2007 US$)	Rankings 2007 Total Mkt Size	2007 Per Capita Exp.	5-year Real % Market Growth
Canada	632.3	883.4	979.9	CAD	1 051.5	5.2%	-1.1%	69.5	29.83	2	2	2
Mexico	211.4	270.2	287.1	MXN	3 177.6	1.5%	4.7%	15.1	2.61	3	3	1
United States	20 689.2	16 865.2	17 502.5	USD	17 502.5	93.3%	-4.9%	- 637.3	57.76	1	1	3
Total	**21 532.9**	**18 018.9**	**18 769.4**			**100.0%**	**-10.4%**	**- 552.7**	**42.10**			

Any choice from 3 countries possible

The matching report covering Europe covers an additional 22 countries.

Local Currency and US$ or Euro Value data provided

A FULL PDF REPORT IS AVAILABLE IN EITHER US$ OR EUROS ONLINE

MARKET POTENTIAL Expenditure Trends and Per Capita Expenditure

FAST MARKET ASSESSMENT Country Rankings Point to Market Strengths and Weaknesses (Relative Size/Strength/Growth)

Online PDF and Excel access provided for any combination of products countries and data

ASSESS YOUR MARKETS !
- Comparative Market Size
- Per Capita Consumption
- Total and Per Capita Growth

* Excludes the "quality" factor, i.e. assumes product continuity. US$pe covers 22 countries and North America (3 countries).

\# All data refer to total final human consumption, including retail, catering/foodservice and artisanal (own-produced for own sale, e.g. independent bakers), thus excluding industrial consumption and auto-consumption.

** Applying current US$s & exchange rates.

\## Applying full 6-Year exponential regression curve analysis, and country/product food price deflators to value data in local currencies. converted back to local currencies at 2001 exchange rate to avoid exchange rete effects. Totals are weighted averages.

Source: Food for Thought

Note: Illustrative Data Only Presented

114 Single Product Markets
and
32 Product Groups available

PRODUCT GROUP: **ICE CREAM AND DESSERTS**
Product: Ice cream
Total Catering Share: 62.0% (by volume)
Definition: # Dairy/non-dairy ice cream and sorbets, industrial and artisanal (including estimates of underrecorded artisanal), soft ice.

Main Process Family: Frozen
Principal Meal Function: Dessert
Dry Weight Conversion Factor:## 0.75

Full Product Definitions
Provided, comparable across all countries. #

Online PDF and Excel access provided for any combination of products, countries and data

MARKET SIZE BY VOLUME

Countries	Total 2007 Markets: Foodserv. Market (million litres)	Retail Market (million litres)	Total Market (million litres)	National Market: Foodserv. Share (%)	Total Market: Foodserv. Share (%)	Retail Share (%)	Consumption Per Capita: Foodserv. (litres)	Retail (litres)	Foodservice Rankings: Total Mkt Size	Nat'l Mkt Share	Per Capita Cons.
Canada	153.5	144.5	298.0	51.5%	3.8%	5.9%	4.67	4.40	2	3	2
Mexico	95.3	51.3	146.7	65.0%	2.4%	2.1%	0.87	0.47	3	1	3
United States	3 744.0	2 256.0	6 000.0	62.4%	93.8%	92.0%	12.36	7.45	1	2	1
Total	**3 992.8**	**2 451.9**	**6 444.7**	**62.0%**	**100.0%**	**100.0%**	**8.96**	**5.50**			

Any choice from 3 countries possible

A UNIQUE COMPLETE PANORAMA OF RETAIL & FOODSERVICE MARKETS BY VOLUME

The matching report covering Europe covers an additional 22 countries.

Consumption Per Capita varies greatly from country to country

Strategic Overview
An instant assessment of the importance of foodservice markets - in some countries negligeable, in others over half the market.

IMPORTANCE OF THE FOODSERVICE MARKET

Country Rankings Point to Foodservice Market Strengths and Weaknesses

(Relative Size/Share/Per Capita Consumption)

Notes:

\# All data refer to total final human consumption, including retail, catering/foodservice and artisanal (own-produced for own sale, e.g. independent bakers), thus excluding industrial consumption and auto-consumption.

\## Single Product volume data is rounded up/down in Product Group tables (including several products) by the Ready-to-Eat/Drink Dry Weight Conversion Factor.

Source: Food for Thought

Note: Illustrative Data Only Presented

114 Single Product Markets
and
32 Product Groups available

PRODUCT GROUP: ICE CREAM AND DESSERTS

Main Process Family: Frozen

Product: Ice cream

Principal Meal Function: Dessert

Total Catering Share: 52.6% (by value)

Definition: # Dairy/non-dairy ice cream and sorbets, industrial and artisanal (including estimates of underrecorded artisanal), soft ice.

Full Product Definitions
Provided, comparable across all countries. #

Online PDF and Excel access provided for any combination of products, countries and data

MARKET SIZE BY VALUE

Countries	Total 2007 Markets: Local Currency Code	Total 2007 Markets: Foodserv. Market (Local millions)	Total 2007 Markets: Retail Market (Local millions)	Total 2007 Markets: Foodserv. Market (US$ millions)	Total 2007 Markets: Retail Market (US$ millions)	Total 2007 Markets: Total Market (US$ millions)	Food-service Share in Nat'l Mkt (%)	Expenditure Per Capita: Foodserv. (US$)	Expenditure Per Capita: Retail (US$)	Foodservice Rankings: Total Mkt Size	Foodservice Rankings: Nat'l Mkt Share	Foodservice Rankings: Per Capita Exp.
Canada	CAD	460.3	591.2	428.9	550.9	979.9	43.8%	13.06	16.77	2	3	2
Mexico	MXN	1 755.6	1 422.0	158.6	128.5	287.1	55.3%	1.44	1.17	3	1	3
United States	USD	9 283.3	8 219.2	9 283.3	8 219.2	17 502.5	53.0%	30.64	27.13	1	2	1
Total				**9 870.9**	**8 898.6**	**18 769.4**	**52.6%**	**22.14**	**19.96**			

Any choice from 3 countries possible

A UNIQUE COMPLETE PANORAMA OF RETAIL & FOODSERVICE MARKETS BY VALUE

The matching report covering Europe covers an additional 22 countries.

Purchasing Power varies greatly from country to country

Local Currency and US$ or Euro Value data provided

A FULL PDF REPORT IS AVAILABLE IN EITHER US$ OR EUROS ONLINE

IMPORTANCE OF THE FOODSERVICE MARKET
Country Rankings Point to Foodservice Market Strengths and Weaknesses
(Relative Size/Share/Per Capita Consumption)

Notes:

\# All data refer to total final human consumption, including retail, catering/foodservice and artisanal (own-produced for own sale, e.g. independent bakers), thus excluding industrial consumption and auto-consumption.

Source: Food for Thought

Note: Illustrative Data Only Presented

100 SELECTED CLIENTS

(from over 1000 clients)

1000+ Clients !

A wide range of manufacturing and service industries have been using the FFT database since 1990.

Food & Drink

Alfred L. Wolff
Allied Mills
Arla Foods
Avebe
Barilla
Baxters Food Group
Beghin-Say
Bonduelle
British Sugar plc
Cadbury Schweppes
Campbell Soup
Cargill International
Carl Kuhne
Centrale Suiker Maatschappij (CSM)
Cuisimer
Danone
Farm Frites
Friesland Foods Int'l
General Mills
H.J. Heinz
Hero
Homina
Kerry Foods
Kraft International
Maple Leaf
Mars/Masterfoods/Effem
Materna
McCain Foods Limited
MD Foods
Migros
Nestle
Nippon Suisan Europe B.V.
Panzani
Pescanova
Premier Foods
Princes MC Foods Europe
Raisio
Rich's
Rollton
Sara Lee/D.E.
Snack Ventures Europe/Pepsico
Swiss Dairy Foods
Unilever
Walter-Rau

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Bain & Company
BHG Beteil. und Holding GmbH
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Boston Consulting Group
Coopers & Lybrand
Ernst & Young
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Kantor Management Consultants
Klaus Becking Business Consulting
KPMG
L.E.K. Consulting
McKinsey & Company
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Numico Research
OC&C Strategy Consultants
Price Waterhouse Coopers
Stamford Partners

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Chr. Hansen
Copenhagen Pectin
Danisco
Degussa
Dow Europe GmbH
DSM/Gist Brocades
Firmenich
FMC
Givaudan Roure
Griffith Laboratories
Int. Flavours & Fragrances (IFF)
Lucta
Novozymes
Palsgaard
Pfizer
Rhodia Food
Roche
Sandoz Nutrition
Sanofi Bio Industries
Royal Cosun
Symrise GmbH

Banking, Investment and M&A Advisory

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BNP Paribas
Cazenove Partners
Credit Suisse First Boston
Deutsche Bank
Estin & Co.
Glitnir
Goldman Sachs
HSBC Bank
J.P. Morgan
Lazard Freres
Lehman Brothers
Merrill Lynch
Morgan Stanley
NIBC Bank N.V.
PAI management
Rabobank International
Rothschild & Cie
Schroder Securities
Spektor, Sachs & Company
UBS Warburg

Packaging & Equipment

Air Liquide
Air Products
Alcan
Berndt & Partner
Clextral
Crown Holdings Inc
Dole Packaged Foods Europe
Flexpakko
Impress Group
Intralox
Maschinenbau Gmbh
Mead Verpakking
Mizkan Group Corporation
PKL Verpackungssysteme
Rintekno Oy
Scholle Corporation
Sealed Air
Siemens
SIG Combibloc
Sollac Aciers pour l'Emballage
Tetrapak
Veriplast

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FREE TRIAL

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