



FULL REPORT CONTENT

All full reports present the following tables for each country, product, company and brand.

>> All tables are also available individually online.

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.

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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.
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- 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

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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

- 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.

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

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Provided online. Includes exchange rates; human, cat and dog populations; etc.

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VOLUME 1: TOTAL MARKET

**114 Single Product Markets
and
32 Product Groups available**

9.1 ICE CREAM

PRODUCT GROUP: ICE CREAM AND DESSERTS

Product: Ice cream

Principal Meal Function:

Frozen
Dessert

W. Europe Forecast:* 0.8% (2007-2012 real average annual values)

Dry Weight Conversion Factor:##

0.75

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

Regional Forecasts

Full Product Definitions
Provided, comparable across all countries.

UPDATE SCHEDULE
The demand database is updated by one year from May to July, country by country.

MARKET SIZE: VOLUME

Countries	Total Markets					Consumption Per Capita			Rankings			
	2002	2006	2007	2007	2002-2007 Av.	2002	2007	2002-07	2007	2007	5-year	
	Total (million litres)	Total (million litres)	Total (million litres)	Shares (per-cent)	Annual Growth (per-cent)*** (litres)	(litres)	(litres)	Growth (average annual)***	Total Mkt Size	Per Capita Cons.	Real % Market Growth	
Austria	55.1	56.3										
Belgium/Lux.	80.6	84.0										
Denmark	48.6	49.0										
Finland	70.3	69.2										
France	334.2	382.7										
Germany	642.0	692.5										
Greece	91.9	94.6	96.0	2.9%	0.8%	0.83	8.37	8.59	0.3%	8	7	10
Ireland/Eire	41.4	45.5	47.1	1.4%	2.4%	1.14	10.58	11.03	0.5%	16	4	4
Italy	565.0	591.5	599.5	18.0%	0.8%	6.91	9.83	10.19	0.2%	2	5	9
Netherlands	132.0	137.8	131.3	3.9%								
Norway	55.0	65.4	67.1	2.0%								
Portugal	63.2	73.9	76.6	2.3%								
Spain	285.0	342.0	351.7	10.5%								
Sweden	117.1	101.4	100.5	3.0%								
Switzerland	54.0	55.4	56.0	1.7%	0.5%	0.40	7.53	7.47	-1.2%	14	13	11
United Kingdom	460.7	482.8	500.0	15.0%	1.8%	7.87	7.80	8.25	1.2%	3	9	5
Western Europe	3 096.0	3 323.9	3 337.9	100.0%	1.3%	48.38	7.92	8.28	0.5%			

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

MARKET POTENTIAL
Per Capita Consumption and 5-Year Trends

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

* Excludes the "quality" factor, i.e. assumes product continuity. ** Countries listed except Norway & Switzerland *** Applying full 6-Year regression analysis.

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

VOLUME 1: TOTAL MARKET

**114 Single Product Markets
and
32 Product Groups available**

9.1 ICE CREAM

PRODUCT GROUP: ICE CREAM AND DESSERTS

Product: Ice cream

Principal Meal Function: Frozen Dessert

W. Europe Forecast:* 0.8% (2007-2012 real average annual values)

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

UPDATE SCHEDULE
The demand database is updated by one year from May to July, country by country.

Regional Forecasts

Full Product Definitions
Provided, comparable across all countries.

MARKET SIZE: VALUE

Countries	Total Markets								Exp. Per Capita (2007) (Ecus)	Unit Values		Rankings		
	2002	2006	2007	2007	2007	2002-2007 Av.		2007		2002-07	2007	2007	5-year	
	(Current Euro millions)	(Current Euro millions)	(Current Euro millions)	(Equivalent Local Currency millions)	Shares (per-cent)	Annual Growth (Real per-cent)## (Current Euro m.)		Index (Total = 100)		Change (2002=100)***	Total Mkt Size	Per Capita Exp.	Real % Market Growth	
Austria	188.0	206.4	221.9	EUR 221.9	1.4%	0.4%	6.8	26.77	84	114	15	15	11	
Belgium/Lux.	312.1	352.4								113	9	12	6	
Denmark	181.2	183.3								113	16	9	14	
Finland	215.4	218.9								104	13	5	10	
France	1 556.0	1 706.0								95	5	16	15	
Germany	2 855.3	3 320.0								113	1	8	5	
Greece	344.8	403.7								117	8	10	7	
Ireland/Eire	169.6	191.0	225.0	EUR 225.0	1.4%	1.5%	11.1	52.70	102	117	14	1	4	
Italy	2 496.2	2 861.7	3 009.9	EUR 3 009.9	19.3%	0.7%	102.7	51.14	108	114	2	3	8	
Netherlands	536.7	597.0	586.0	EUR 586.0	3.8%	0.2%	9.9	35.71	96	110	6	11	12	
Norway	191.4	217.0	238.9	NOK 1 923.3	1.5%					102	12	2	1	
Portugal	268.2	320.4	365.5	EUR 365.5	2.3%					12	10	13	3	
Spain	1 274.3	1 742.6	1 907.4	EUR 1 907.4	12.2%					21	4	6	2	
Sweden	476.6	403.5	440.3	SEK 4 095.1	2.8%					108	7	4	16	
Switzerland	332.5	319.1	323.2	CHF 533.3	2.1%	0.5%	-1.9	43.11	124	94	11	7	9	
United Kingdom	2 041.9	1 966.5	1 991.7	GBP 1 386.2	12.8%	0.1%	-10.0	32.85	85	90	3	14	13	
Western Europe	13 440.4	15 009.4	15 583.2					428.6	38.66	100	108			

* Excludes the "quality" factor, i.e. assumes product continuity. ** Countries listed except Norway & Switzerland *** Applying current euros & exchange rates.
 # 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 exponential regression curve analysis, and country/product food price deflators to value data in local currencies. In Euro area, 2002- 2005 values converted back to local currencies at 2001 exchange rate to avoid exchange rate effects. Totals are weighted averages.
 Source: Food for Thought

Note: Illustrative Data Only Presented

VOLUME 2: FOODSERVICE & RETAIL MARKETS

**114 Single Product Markets
and
32 Product Groups available**

ICE CREAM

PRODUCT GROUP: ICE CREAM AND DESSERTS

Main Process Family:

Frozen

Product: Ice cream

Principal Meal Function:

Dessert

Total Catering Share: 44.0% (by volume)

Dry Weight Conversion Factor:##

0.75

Single Product volume da Dairy/non-dairy ice cream and sorbets, industrial and artisanal (including estimates of underrecorded artisanal), soft ice.

**Data year provided - All Countries
Updated May-July Each Year - Annual
Subscribers get free access.**

MARKET SIZE BY VOLUME

**Full Product Definitions
Provided, comparable
across all countries.**

Countries	Total 2007 Markets			National Market	Total Market			Consumption Per Capita		Foodservice Rankings		
	Foodserv. Market	Retail Market	Total Market		Foodserv. Share	Foodserv. Share	Retail Share	Foodserv. (litres)	Retail (litres)	Total Mkt Size	Nat'l Mkt Share	Per Capita Cons.
Austria	16.3	40.6	56.8	28.6%	1.1%	2.2%	1.96	4.89	16	15	15	
Belgium/Lux.	29.9	57.1					2.72	5.19	10	12	13	
Denmark	27.0	22.1					4.95	4.05	12	5	5	
Finland	29.7	44.6					5.64	8.46	11	10	1	
France	111.9	249.1					1.77	3.94	5	14	16	
Germany	241.7	442.2					2.93	5.36	3	11	12	
Greece	49.4	46.6	96.0	51.5%	3.3%	2.5%	4.42	4.16	8	6	9	
Ireland/Eire	22.6	24.5	47.1	47.9%	1.5%	1.3%	5.29	5.74	14	7	2	
Italy	282.7	316.9	599.5	47.2%	18.9%	17.2%	4.80	5.38	1	8	6	
Netherlands	59.0	72.3	131.3	45.0%	3.9%	3.9%	3.60	4.40	6	9	11	
Norway	21.0	46.0	67.1	31.4%	1.4%	2.5%	4.51	9.86	15	13	8	
Portugal	52.8	23.7	76.6	69.0%	3.5%	1.3%	4.97	2.23	7	1	4	
Spain	219.6	132.1	351.7	62.4%	14.7%	7.2%	4.98	3.00	4	2	3	
Sweden	23.9	76.5	100.5	23.8%	1.6%	4.2%	2.64	8.44	13	16	14	
Switzerland	30.9	25.2	56.0	55.1%	2.1%	1.4%	4.12	3.36	9	4	10	
United Kingdom	280.0	220.0	500.0	56.0%	18.7%	12.0%	4.62	3.63	2	3	7	
Western Europe	1 498.5	1 839.4	3 337.9	44.9%	100.0%	100.0%	3.72	4.56				

**A UNIQUE COMPLETE PANORAMA
OF
RETAIL & FOODSERVICE MARKETS
BY VOLUME**

Strategic Overview
An instant assessment of the importance of foodservice markets - in some countries negligible, 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)

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. ## Countries listed except Norway & Switzerland

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 2: FOODSERVICE & RETAIL MARKETS

**114 Single Product Markets
and
32 Product Groups available**

ICE CREAM

PRODUCT GROUP: ICE CREAM AND DESSERTS

Main Process Family:

Frozen

Product: Ice cream

Principal Meal Function:

Dessert

Total Catering Share: 37.6% (by value)

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

Data year provided - All Countries
Updated May-July Each Year - Annual
Subscribers get free access.

MARKET SIZE BY VALUE

Full Product Definitions
Provided, comparable
across all countries.

Countries	Total 2007 Markets						Food-service Share in Nat'l Mkt (%)	Expenditure Per Capita		Foodservice Rankings		
	Local	Foodserv.	Retail	Foodserv.	Retail	Total		Foodserv.	Retail	Total	Nat'l	Per
	Cur- rency Code	Market (Local millions)	Market (Local millions)	Market (Euro millions)	Market (Euro millions)	Market (Euro millions)		(Euros)	(Euros)	Mkt Size	Mkt Share	Capita Exp.
Austria	EUR	54.0	167.9	54.0	167.9	221.9	24.3%	6.52	20.26	16	15	16
Belgium/Lux.	EUR	118.3	<p>A UNIQUE COMPLETE PANORAMA OF RETAIL & FOODSERVICE MARKETS BY VALUE</p>				10.76	24.00	10	11	13	
Denmark	DKK	721.5					17.81	20.28	11	5	6	
Finland	EUR	80.7					15.30	29.69	14	10	9	
France	EUR	419.7					6.63	18.54	5	13	15	
Germany	EUR	1 030.4					12.49	29.10	2	12	12	
Greece	EUR	185.2	237.9	185.2	237.9	423.1	43.8%	16.57	21.28	8	6	7
Ireland/Eire	EUR	91.7	133.3	91.7	133.3	225.0	40.8%	21.48	31.22	12	7	2
Italy	EUR	1 216.7	1 793.2	1 216.7	1 793.2	3 009.9	40.4%	20.67	30.47	1	8	3
Netherlands	EUR	224.0	362.0	224.0	362.0	586.0	38.2%	13.65	22.06	6	9	10
Norway	NOK	486.4	1 437.0	60.4	178.5	238.9	25.3%	12.95	38.27	15	14	11
Portugal	EUR	214.4	151.1	214.4	151.1	<p>Purchasing Power varies greatly from country to country</p>		14.21	7	1	5	
Spain	EUR	1 012.4	895.0	1 012.4	895.0			20.30	3	2	1	
Sweden	SEK	829.2	3 266.0	89.2	351.2	525.2	40.0%	20.19	38.72	13	16	14
Switzerland	CHF	249.8	283.5	151.4	171.8	321.2	40.0%	20.19	22.92	9	4	4
United Kingdom	GBP	659.9	726.4	948.1	1 043.7	1 991.7	47.6%	15.64	17.21	4	3	8
Western Europe				5 993.4	9 589.8	15 583.2	38.5%	14.87	23.79			

Local Currency and US\$ or Euro value data provided.

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

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. ## Countries listed except Norway & Switzerland

Source: Food for Thought

Note: Illustrative Data Only Presented

VOLUME 3: COMPANY MARKET SHARES

9.1 ICE CREAM

N° Ultimate Holding Co.s cited: 40
N° Key Subsidiaries cited: 35

2008 COMPANY MARKET SHARES BY VALUE ^a
[Mergers and acquisitions updated regularly]

114 Single Product Markets and 32 Product Groups available

ULTIMATE HOLDING COMPANY	Any Country Selection (from 1 to 25) possible, table extends to right >>>							TOTAL
	Belgium/Luxembourg	France	Germany	Italy	Netherlands	Spain	United Kingdom	7-Country Market Shares (N° Countries Present)**
Unilever	Ola	Glaces	Unilever	Sagit	Iglo-Mora	Friigo	IC&FF	Unilever 28.3% (7 countries)
Key subsidiaries identified		27.8% Frd	31.3% Schöller	23.8% Italgel	33.8%	24.3%	34.0%	Nestlé 19.6% (6 countries)
		15.9%	23.2%	32.9%	10.6%			Artisanal* 13.0% (7 countries)
Artisanal*	Artisanal	Artisanal	Artisanal	Artisanal				Oaktree Capital 7.6% (5 countries)
Oaktree Capital							3.5% Foods	Mars 4.4% (7 countries)
Mars	Master Foods						28.1% Mars UK	PNIC 1.9% (1 country)
Promotora de							11.9%	General Mills 1.6% (6 countries)
General Mills				Häagen Dazs	Häagen Dazs	Häagen Dazs	Häagen Dazs	Sammon-tana 1.6% (1 country)
Sammontana				0.9% tana	1.0%	1.6%	1.2%	Sub-Total 54% 74% 86% 79% 75% 70% 79% 78%
Ultimate Holding Company:	CNP	Rolland	Eiskrem	G7	Milcobel			MERGER & ACQUISITION OPPORTUNITIES Play Strategic Dominoes.... Match blank squares or low market shares with other companies in a country column to spot possible M&A opportunities! Then Check the Company Profiles!
				G7	Ysco			
				6.0%	6.3%			
				Barilla	Coberco			
				Sanson	FDF			
OTHER	11.1%	4.5%	0.9%	3.0%	5.5%	3.4%	1.8%	Milcobel 1.0% (5 countries)
COMPANIES								STRATEGIC COMPANY PROFILES Want to find out more about a company? 10,000+ Strategic Company Profiles are available on FFT's online database.
UHC	Mio	Milcobel	HMU	Gis Gelati	Moraco	Aiadhessa	Fare	
SUB	Mio	Ysco	HMU	Gis Gelati	Artic	Aiadhessa	Fare	
UHC	5.0%	3.5%	0.6%	2.5%	3.5%	3.3%	1.6%	
SUB	Milcobel	ITM					Dairies	
UHC	4.5%	2.2%					1.6%	Rolland 0.7% (4 countries)
UHC	moortele	Thiriet	Durigon	Bofrost	Scheijndel	Jijonencas	Greencore	Moraco 0.7%
UHC	Alpro	Thiriet	Durigon	Bofrost Italia	Scheijndel	Jijonencas	Robert's	
Market Value Totals Provided	1.5%	2.1%	0.6%	1.4%	2.6%	2.0%		The Top-13 Companies (for the countries selected)
All Other Companies	4.4%	9.3%	6.3%	6.1%	4.3%	13.8%		
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Of which:**	83.4%	72.7%	60.5%	59.6%	83.7%	80.1%	72.3%	68.2%
Branded	Complete Branded Vs Own Label, Unbranded and Artisanal (own-produced for own sale) analysed.							
Unbranded								
Artisanal	9.7%	6.9%	10.5%	33.0%	8.9%	3.0%	3.5%	13.0%
Own Label (in total)	6.9%	20.4%	29.0%	7.5%	7.4%	16.9%	24.2%	18.7%
Own Label (in retail)	10.0%	27.7%	41.5%	12.5%	12.0%	36.0%	46.1%	30.5%
2007 Total Market (EUR m.)	382.1	1,592.9	3,430.5	3,009.9	586.0	1,907.4	1,991.7	12,900.6

^a Definition: Market shares are by VALUE, and refer to ALL products SOLD for final human consumption in retail, catering and artisanal* markets (see total market data at bottom of table);

Company abbreviations: See annexes or fft.com website co. search. * Artisanal: Own-produced for own sale (e.g. independent bakers, considered here as a single competitive entity/company).

Edition: Continuously updated.

** Latest market values used for weighted averages.

Company shares listed above may include several categories.

Note: Illustrative Data Only Presented

All Companies this selection in alphabetic order

VOLUME 4: STRATEGIC COMPANY PORTFOLIOS

2008 COMPANY MARKET SHARES AND RANKINGS

AC CAPITAL TO ZOTT

Any combination of **114 Single Product Markets available**
Report sample here is for the Desserts Market

(Updated continuously)
N° of Country Markets: 7
N° of Product Markets: 3
N° of Market Shares: 323
N° of Holding Companies: 171
N° of Key Subsidiaries: 129
N° of All Companies cited: 300

300 Companies + 323 Co. Market Shares
for this very small sample
(3 products * 7 countries = 21 markets out of 3000+ available)

Company and Product Market		Country Operating Companies and Market Shares (Country Product Market Rankings in brackets)							7-Selected Country Market Shares		Share of Co. Food & Drink Sales *
		Belgium/ Lux.	France	Germany	Italy	Nether- lands	Spain	United Kingdom	Product Market	All Food & Drink	
No.	Name	Any Country Selection (from 1 to 25) possible, table extends to right									
AC Capital 9.2	Chilled Dairy Desserts	The Desserts Market: 1) Chilled Dairy Desserts 2) Powdered Desserts 3) Ice Cream							0.1%	0.040%	60.9%
AC Capital 9.3	Powdered Desserts	EXHAUSTIVE A-Z COMPANY LISTING (here the 1st of 20 pages for Desserts in 7 Country Markets from AC Capital to Zott, or 300 companies altogether) ALL companies for the product markets and countries selected are listed, in alphabetic order, together with their:								0.025%	39.1%
Agrolimen 9.3	Powdered Desserts									0.034%	100.0%
Aiadhessa 9.1	Ice Cream	<ul style="list-style-type: none"> Key Country Subsidiaries Product and Country Market Shares Product and Country Rankings 							0.5%	0.302%	100.0%
Andros 9.2	Chilled Dairy Desserts	Regional Co. Market Share Each company's overall market share for the countries selected given							2.5%	0.894%	85.5%
Andros 9.1	Ice Cream	<ul style="list-style-type: none"> as well as the overall All Country+Product Market Share for all the countries and products selected (here 7 countries*3 product markets = 21 markets)								0.152%	14.5%
Antequerana 9.2	Chilled Dairy Desserts								0.2%	0.060%	100.0%
Arla Foods 9.2	Chilled Dairy Desserts	STRATEGIC COMPANY PROFILES Want to know more? Go to "10,000+ Companies" online and download a specific company profile !							0.3%	0.091%	100.0%
Bain Capital 9.1	Ice Cream	Contribution to Company Sales Turnover Estimated % contribution of each product market to company sales turnover (this selection in retail and foodservice buy-in prices)							0.2%	0.089%	100.0%
And 300 A to Z Companies later											
Zott 9.2	Chilled Dairy Desserts								1.8%	0.633%	100.0%

* Definition: Market share data refers to total FINAL human consumption, including retail, catering/foodservice and artisanal (home-produced for direct sale), excluding auto- and industrial consumption, and calculated in value terms at retail and catering buy-in prices including direct taxes, e.g. VAT and Excise Taxes. West European and country total market shares are indicative weighted averages, based on latest Food & Drink Market data available. Country market rankings are cited in brackets. Country market shares under 3% are indicative.

Edition: Market shares updated continuously, with mergers & acquisitions incorporated regularly; latest market values used for weighted averages (see online)

Source: FFT

Note: Illustrative Data Only Presented

VOLUME 5: MAJOR BRANDS AND "WHO OWNS WHOM"

MAJOR BRANDS BY PRODUCT & COUNTRY MARKET					
No.	Product Name	C'try	Holding Co.	Subsidiary	Major Brands
9.1	Ice cream	A	Berglandmilch Rottaler	Alpi Milchind.	Eis Perfekt
9.1	Ice cream	A	General Mills	Häagen Dazs	Häagen Dazs
9.1	Ice cream	A	Mars	MFA	Mars, Bounty, Milky Way, Twix, Opal fruits, Dove Milk, Milky Way Star, Snickers
9.1	Ice cream	A	Nestlé	Schöller	Schöller, Mövenpick, Eiszweg, Beach Fresh, Jumbo Fru, Cono, Bahia, Manhattan, Motta, Frubetto
9.1	Ice cream	A	Oaktree Capital	Roncadin Eis	Landliebe, Dr Oetker
9.1	Ice cream	A	Tirol Milch	Tirol Milch	TIMI
9.1	Ice cream	A	Unilever	Eskimo	Calippo, Cornetto, Eskimo, Sorbetteria, Twister, Viennetta, Langfinger, Nogger, Quaxi, Cremissimo, Bubidu, Boomy, Spirello, Camillino, Magnum, Romero, Super Mario, Jolly, Twinni, Mampfbacke, Solero, Paiper
9.1	Ice cream			Ijsboerke	Ijsboerke, Picco's Dame Blanche, Brazilliana, Yoghurt Ice, Bavarois Framboise, Super Coco, Dino, Coppa Vegra, Mini Bigs, Peep-Up, Lollie-Cola, La Luna, Big Exotic
9.1	Ice cream			Pilpa	Pilpa
9.1	Ice cream			Häagen Dazs	Häagen Dazs, Ba
9.1	Ice cream	B/L	La Vie	La Vie	La Vie
9.1	Ice cream	B/L	Linea Verde	Linea Verde	Esselunga, Tiram
9.1	Ice cream	B/L	Mars	Master Foods	Mars, Bounty, Milky Way, Opal Fruits, Twix, Snickers, Starburst
9.1	Ice cream	B/L	Milcobel	Ysco	Krio, Ysco, Royal, Melissa, Tuffino, Bioline, Tropical, Orangina, Natural Line, Appassionato
9.1	Ice cream	B/L	Mio	Mio	Frisko, Artic, Noisella, Cornets d'Amour, Prestige, Frisa Bar, Black Choc, Perletta, Violini, Brasiliero, Expo, Superbig, Top fruit, Kid Limbo, Slammer
9.1	Ice cream	B/L	Moraco	Artic	Schöller, Mövenpick, Pinti, Peach Yoghourt, Symphony, Campina Ijs, Okay Ijs, Jive, Gammon, Galak, Lion, Frubetto
			Nestlé	Schöller	

Any Country and Product Selection Possible

Major Brands are listed by product, country, holding company and key local subsidiary.

OVER 30,000 MAJOR BRANDS are cited in the database.

Brands Listings by Product and by Holding Company are provided in each report.

BRANDS BY ULTIMATE HOLDING COMPANY					
Holding Co.	Operating Co.	No.	Product Name	C'try	Major Brands
Caldos del Norte	Caldos del Norte	9.3	Powdered Desserts	ESP	Calnort
Campbell Soup	Campbell Foods	9.3	Powdered Desserts	BEL	Imperial
Campina	Campina AG	9.2	Chilled Dairy Desserts	BEL	Fruttis, Puddis
Campina	Campina AG	9.2	Chilled Dairy Desserts	FRA	Frudise, Strothmann
Campina	Campina	9.2	Chilled Dairy Desserts	DEU	Landliebe Milchreis, Mark Brandenburg, Puddis, Strothmann,
Campina	Campina Melku	9.2	Chilled Dairy Desserts	NLD	Bon-O-Mel, Campina, Friline, Fruttis, Momentvla, Mona, Puddis,
Campina	Lacteos Campin	9.2	Chilled Dairy Desserts	ESP	Mondelice
Campina	Campina MKW	9.2	Chilled Dairy Desserts	GBR	Delice, Vifit
Campina	Campina Melku	9.3	Powdered Desserts	NLD	Royale
Carrascal	Carrascal	9.1	Ice Cream	ESP	Carrascal
Casty	Casty	9.1	Ice Cream	ESP	Casty
Central Lechera Asturian	Corporacion Alir	9.2	Chilled Dairy Desserts	ESP	Asturiana, Clas
Centrale del Latte di Tori	Centrale del Lat	9.2	Chilled Dairy Desserts	ITA	Centrale del Latte di Torino
Champagne Céréales	France Farine	9.3	Powdered Desserts	FRA	Francine
Cityback Berlin	Cityback Berlin	9.1	Ice Cream	DEU	American Paradise
Clayton, Dubilier & Rice	Brake France	9.1	Ice Cream	FRA	
Clayton, Dubilier & Rice	Brake Bros	9.1	Ice Cream	GBR	Pullman, Tuck Shop
Clayton, Dubilier & Rice	Dairy Fresh Des	9.2	Chilled Dairy Desserts	GBR	
Compagnie Nationale à F	Ijsboerke	9.1	Ice Cream	BEL	Bavarois Framboise, Big Exotic, Brazilliana, Coppa Vegra, Dino,
Compagnie Nationale à F	Ijsboerke	9.1	Ice Cream	DEU	Ijsboerke
Consorzio Granlatte	Consorzio Gran	9.2	Chilled Dairy Desserts	ITA	Accadi, Bunette, Granarolo, Mandriot, Mandriot Gel, Tartufo,
Consumenten Produkten	Consumenten P				Fido Dido, Kwak
General Mills	Häagen Dazs				Häagen Dazs
General Mills	Häagen Dazs				Häagen Dazs
General Mills	Häagen Dazs				Häagen Dazs, Häagen Dazs Exträas, Bailey's
Gis Gelati	Gis Gelati	9.1	Ice cream	I	Gis, La Botega del Buon Gelato, Top Cream, Dolci Delizie, Sorrana, Nivene, Viviana, Ar Blu, Gisoia
Glanbia	Glanbia	9.1	Ice cream	IRE	Yoplait Frozen Yoghurt
Glasskiosken	Glass-kiosken	9.1	Ice cream	S	Disney, Lion, Smarties, After Eight, Extreme, Extreme Gold, Maxibon, Åhus Glass, Tofuline, Kingis, Sundborn, Mövenpick, Winner

Companies active in the products and countries selected and their major brands can be quickly identified.

Key Local Subsidiaries are systematically identified

Note: Illustrative Data Only Presented

REPORTS FOR ANY COMBINATION OF COUNTRIES, REPORTS AND DATA ARE PRODUCED AUTOMATICALLY ONLINE
Here are just a very few examples !

SAMPLE REGIONAL MARKET REPORTS
Full Descriptions available online at <http://www.fft.com>

With continuous updating, numbers of companies and market shares can vary.

Sample Report Titles	No. of Products	Product Markets Included in Each Report	No. of Companies per Report				Est. Co. Market Shares quoted				
			Western Europe	Central Europe	North America	All 3 Regions	Western Europe	Central Europe	North America	All 3 Regions	
			(16 C'tries)	(6 C'tries)	(3 C'tries)	(25 C'tries)	(16 C'tries)	(6 C'tries)	(3 C'tries)	(25 C'tries)	
Alcoholic Drinks	4	All Alcoholic Beverages, Beer, Wine, Still wine, Sparkling wine, Aperitifs & Spirits	743	384	172	1183	1079	424	183	1686	
All Fresh & Processed fish	4	All Fresh & Processed Fish, Fresh Fish, Canned Fish, Frozen Fish, and Dried, salted, and smoked fish	667	207	120	952	748	283	138	1169	
Baby Foods	3	All Baby Foods, Baby jars, Baby milks, Other baby foods	106	65	24	161	215	113	35	363	
Bakery Products	8	All Flour & Bakery, Flour (retail only), Bread products, Crispbread, Industrial pastry, Biscuits, Frozen pastry products, All Pasta, Fresh Pasta, Dry Pasta	1053	389	197	1523	1380	448	248	2076	
Canned Products	10	Canned fruit, Canned vegetables, Canned and cartoned soup, Canned meat, Canned fish, Canned pasta, Canned ready meals, Baby Foods, Canned Cat, Canned Dog	10 000+ FOOD & DRINK COMPANIES FFT Reports provide unparalleled coverage of Companies and their Market Shares... see below...				2718				
Cheese	3	Fresh cheese, Natural cheese, Processed cheese					1011				
Confectionery	4	All Sugar Confectionery, Chewing gum, Other sugar confectionery, All Chocolate Confectionery, Chocolate countlines, Other chocolate confectionery	445	154	110	627	735	241	152	1128	
Dairy Products	7	Liquid milk, Cream, Yoghurt, Condensed milk, Powdered milk, Ice cream, Chilled dairy desserts	593	338	108	982	1048	512	161	1721	
Dehydrated Products	8	Dehydrated potato, Powdered milk, Powdered desserts, Dehydrated soup, Dehydrated sauces, Dehydrated ready meals, Soluble coffee, Baby milks (retail only)	372	215	101	616	576	298	119	993	
Desserts	9	Industrial pastry, Frozen pastry products, Cream, Yoghurt, Fresh cheese, Natural cheese, All Desserts & Ice Cream, Ice cream, Chilled dairy desserts,	1410	• Dairy in Western Europe (16 countries): 593 companies and 1048 market shares				3176			
Dressings & Condiments	8	All Dressings & Condiments, Mayonnaise, Salad dressings, Ketchup, Vegetables in Vinegar, Mustard, Table salt, Herbs & spices, Vinegar	586	266	107	907	922	380	148	1450	
Fresh & Processed Meat	10	All Fresh and Processed Meat, All Fresh Meat, Beef, Pork, Mutton, Poultry, Other fresh meat, All Processed Meat, Canned meat, Frozen convenience meat, Cured meat, Bacon & ham,	1201	499	201	1835	1915	843	270	3028	
Fresh Meat	5	All Fresh Meat, Beef, Pork, Mutton, Poultry, Other fresh meat	541	289	117	926	792	387	128	1307	
Fresh Products	10	Fresh fruit, Fresh vegetables, Fresh potatoes, Eggs, All Fresh & Processed Meat, Beef, Pork, Mutton, Poultry, Other fresh meat, Fresh fish	1016	402	213	1591	1324	530	234	2088	
Frozen Foods	10	Frozen pastry products, Frozen fruit, Frozen vegetables, Frozen potato, Ice cream, Frozen soup, Frozen convenience meat, Frozen fish, Frozen pizza, Frozen ready meals	1177	390	262	1723	1738	492	317	2547	
Fruits	3	Fresh fruit, Canned fruit, Frozen fruit	• Frozen Foods in Central Europe (6 countries): 390 companies and 492 market shares				597				
Hot Beverages	6	All Hot Beverages, Bean and ground coffee, Soluble coffee, Coff substitutes, Black tea, Herbal teas, Powd. choc. & malted drinks	1055								
Jams & Spreads	3	All Preserves, Jams & marmalade, Honey, Other sweet spreads	329	154	65	507	379	162	63	604	
Oils And Fats (Edible)	7	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)	430	319	107	790	661	375	123	1159	
Pasta & Pasta Sauces	3	All Pasta, Fresh Pasta, Dry Pasta, Pasta Sauces	Product Definitions ...are fully comparable across all country markets, offering a strategic picture across all countries and products.				707				
Petfoods	4	All Petfoods, Canned cat food, Canned dog food, Dry/semi-moist cat food, Dry/semi-moist dog food	559								
Potato & Potato Products	4	All Potato & Potato Products, Fresh potatoes, Potato crisps, Froze potato, Dehydrated potato	588								
Processed Meat	5	All Processed Meat, Canned meat, Frozen convenience meat, Cured meat, Bacon & ham, Delicatessen products	1721								
Ready Meals	7	All Ready Meals, Canned pasta, Canned ready meals, Dehydrated ready meals, Frozen pizza, Frozen ready meals, Chilled ready meals, Sandwiches	823	197	132	1079	1055	219	159	1433	
Sauces	6	All Canned & Cartoned Sauces, Canned tomato, Tomato concentrate, Pasta sauces, Other canned sauces, Dehydrated sauces, Bouillon cubes	322	133	72	480	589	214	113	916	
Savoury Snacks	4	All Savoury Snacks, Nuts, Savoury biscuits, Extruded snacks, Potato crisps	702								
Soft Drinks & Juices	7	All Soft Drinks & Juices, Mineral water, Soft drinks, Fruit juices and drinks, Fruit juices, Fruit drinks, Squashes and concentrates, Health & sports drinks, Iced tea	738	339	177	1167	1194	484	240	1918	
Soups	4	Canned and cartoned soup, Dehydrated soup, Frozen soup, Bouillon cubes	208	62	49	292	284	91	56	431	
Sweet Snacks	7	Industrial pastry, Biscuits, Frozen pastry products, All Sugar Confectionery, Chewing gum, Other sugar confectionery, All Chocolate Confectionery, Chocolate countlines, Other chocola confectionery	943	272	201	1277	1372	369	264	2005	
Vegetables	4	Fresh vegetables, Canned vegetables, Frozen vegetables, Chilled vegetables	486	187	91	725	533	191	98	822	
Average No. Co.s Per Report for above selection:			604	258	122	919	891	345	153	1,389	

100 SELECTED CLIENTS (from over 1000 clients)

1000+ Clients !
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Food & Drink

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