

VOLUME 3: COMPANY MARKET SHARES

9.1 ICE CREAM

N° Ultimate Holding Co.s cited: 40
N° Key Subsidiaries cited: 34

2011 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 7-Country Market Shares (N° Countries Present)**
	Belgium/Luxemburg	France	Germany	Italy	Netherlands	Spain	United Kingdom	
Unilever	Ola	Unilever Glaces	Unilever	Sagit	Iglo-Mora	Friigo	Unilever IC&FF	Unilever 28.4% (7 countries)
Key subsidiaries identified		27.8%	31.3%	23.8%	33.8%	24.3%	34.0%	
		Nestlé Grand Frd	Schöller	Italgel				Nestlé 19.5% (6 countries)
Artisanal*	Artisanal	Artisanal	Artisanal	Artisanal				Artisanal* 13.7% (7 countries)
Oaktree Capital							Richmond Foods 3.5%	Oaktree Capital 7.7% (5 countries)
Mars	Mars						Mars UK 11.9%	Mars 4.4% (7 countries)
Sammontana								Sammontana 1.7% (1 country)
General Mills				Häagen Dazs	Häagen Dazs	Häagen Dazs	Häagen Dazs	General Mills 1.7% (6 countries)
G7				G7				G7 1.5% (1 country)
Sub-Total	54%	74%	86%	85%	75%	57%	79%	79%
Ultimate Holding Company:	CNP	Rolland	Rosen Eiskrem	Barilla				Rosen Eiskrem 1.5% (1 country)
In the TOP HALF of the table, the Top-8 suppliers are listed by total market share (last column) and their presence set out country by country.				Sanson				
				Gis Gelati				
In the BOTTOM HALF of the table, other companies of national significance are listed.				Gis Gelati				PNIC 1.2% (1 country)
OTHER	11.1%	4.5%	0.9%	3.0%	5.5%	3.4%	1.8%	
UHC	Mio	Milcobel	HMU	Mantua Surgelati	Moraco	Carrascal	Creamery Fare	Milcobel 1.0% (5 countries)
SUB	Mio	Ysco	HMU	Mantua Surgelati	Artic	Carrascal	Creamery Fare	
UHC	5.0%	3.5%	0.6%	2.5%	3.5%	3.3%	1.6%	
SUB	Milcobel	ITM					Frederick's Dairies	Rolland 0.8% (4 countries)
UHC	Ysco	Délices Val-Ples.					Frederick's Dairies	
SUB	4.5%	2.2%					1.6%	
UHC	Vandemoortele	Thiriet	Durigon	Fruttadoro	Ijsfabriek Scheijndel	Nueva Rumasa	Greencore	Moraco 0.8% (4 countries)
SUB	Alpro	Thiriet	Durigon	Orogel	Ijsfabriek Scheijndel	Clesa	Robert's	
UHC	1.5%	2.1%	0.6%	1.0%	2.6%			
SUB	4.4%	9.3%	6.3%	5.1%	4.3%			
All Other Companies								16.0%
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Of which:**	Branded 83.4%	72.7%	60.5%	59.6%	83.7%	80.1%	72.3%	67.5%
Unbranded								
Artisanal	9.7%	6.9%	10.5%	33.0%	8.9%	3.0%	3.5%	13.7%
Own Label (in total)	6.9%	20.4%	29.0%	7.5%	7.4%	16.9%	24.2%	18.8%
Own Label (in retail)	9.8%	27.7%	41.5%	12.4%	12.0%	36.0%	46.1%	29.9%
2010 Total Market (EUR m.)	399.9	1,694.3	3,530.8	3,075.8	619.2	1,180.9	1,838.3	12,339.3

Presenting FFT's Unique Strategic Analysis of MAJOR FOOD MANUFACTURERS

- All holding companies/key subsidiaries/country and regional market shares for each product selected;
- Market dominance of top companies by country and regionally
- branded vs own label, unbranded and artisanal

COMPLETE STRATEGIC PICTURE
ALL final human consumption included - retail, foodservice and "artisanal", such as independent bakers.

MERGER & ACQUISITION OPPORTUNITIES
Play Strategic Dominos....
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!

STRATEGIC COMPANY PROFILES
Want to find out more about a company?
10,000+ Strategic Company Profiles are available on FFT's online database.

Market Value Totals Provided

The Top-13 Companies (for the countries selected)

Complete Branded Vs Own Label, Unbranded and Artisanal (own-produced for own sale) analysed.

^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