

VOLUME 1: TOTAL MARKET

PRODUCT GROUP: ICE CREAM AND DESSERTS

Main Process Family: Frozen

Product: Ice cream

Principal Meal Function: Dessert

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

UPDATE SCHEDULE
All data updated in April / May each year. Annual Subscribers get Free Access.

UPDATE SCHEDULE
The demand database is updated by one year in April / May

Full Product Definitions
Provided, comparable across all countries.

MARKET SIZE: VALUE

Countries	Historical Markets			Forecast Markets **			Historical & Forecast Growth			Market Analysis			
	2005	2009	2010	2011	2012	2013	2005-10	2005-10	2010-13	2010	2010	2010	
	(Current Euro millions)	(Current Euro millions)	(Current Euro millions)	(Constant 2008 Euro millions)	(Current 2008 Euro millions)	(Current 2008 Euro millions)	Ann. Gr. (Current Euro m.)	Ann. Gr. (Av. annual real %)*	Ann. Gr. (Av. annual real %)**	Market (Local Currency millions)	Market Shares (percent)	Expend. per capita (Euros)	
Austria	201.3	230.0	234.3	239.3	244.6	250.1	6.6	1.4%	0.5%	EUR	234.3	0.8%	27.91
Belgium/Lux	347.0	388.5	399.2	411.2	422.5	435.6	10.5	1.1%	1.0%	EUR	399.2	1.3%	35.25
Bulgaria	40.1	67.9	70.7	74.1	77.8	80.9	6.1	4.9%	1.6%	BGL	138.3	0.2%	9.35
Canada	659.6	712.1									1 139.6	2.7%	24.82
Czech Republic	255.7	379.2									10 286.7	1.3%	39.58
Denmark	192.9	207.5									1 539.8	0.7%	37.56
Finland	216.0	250.5									267.9	0.9%	50.10
France	1 852.6	1 532.7									1 506.0	4.9%	24.11
Germany	3 104.4	3 492.6									3 548.2	11.5%	42.84
Greece	385.5	442.7									414.4	1.3%	36.72
Hungary	162.5	205.6	222.3	232.5	240.7	248.5	12.0	3.8%	0.7%	HUF	61 229.9	0.7%	22.21
Ireland	194.6	234.0	244.8	255.5	266.2	277.7	10.0	2.1%	2.6%	EUR	244.8	0.8%	56.31
Italy	2 759.8	3 068.1	3 117.2								3 117.2	10.1%	52.83
Mexico	198.4	206.2	241.4								4 047.1	0.8%	2.23
Netherlands	639.5	630.0	622.4								622.4	2.0%	37.84
Norway	219.8	248.1	278.9								2 232.7	0.9%	57.17
Poland	276.2	431.2	481.6								1 923.7	1.6%	12.74
Portugal	327.5	389.0	384.6	394.3	405.1	414.8	11.4	2.0%	1.2%	EUR	384.6	1.3%	36.19
Romania	106.3	141.5	153.5	164.4	171.9	178.7	9.4	4.9%	1.5%	ROL	646.5	0.5%	7.15
Slovakia	72.2	113.4	115.3	117.6	119.7	122.0	8.6				115.3	0.4%	21.35
Spain	1 248.5	1 045.7	1 045.6	995.2	974.7	976.3	-40.6				1 045.6	3.4%	23.40
Sweden	434.0	429.8	490.8	509.3	528.2	545.4	11.4				4 680.6	1.6%	52.87
Switzerland	329.7	353.1	386.9	388.2	391.9	396.2	11.4				534.1	1.3%	50.15
United Kingdom	1 996.5	1 620.6	1 717.0	1 738.4	1 748.1	1 773.8	-55.9	-1.5%	-0.9%	GBP	1 472.9	5.6%	27.56
United States	13 704.7	12 847.3	13 345.8	13 268.0	13 222.2	12 850.3	-71.8	-1.0%	-2.3%	USD	17 692.5	43.4%	43.20
Total	29 925.2	29 667.5	30 737.0	30 849.8	31 086.5	31 034.9	162.4	0.4%	0.4%			100.0%	32.36

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 exponential regression curve analysis which includes data for all intermediary years. Based on local currencies applying country/product food price deflators to value data to obtain constant prices. If currency change, e.g. to Euros, new currency data converted back to local currencies using last available last exchange rate to avoid exchange rate effects. Excludes the "quality" factor, i.e. assumes product continuity.

** Applying last historic year exchange rates and current euros (hence no inflation effect on forecast growth calculations).

Source: Food for Thought

Note: Illustrative Data Only Presented