# The Future of the Ice Cream Market in Australia to 2017

**Reference Code: FD0161MR**
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# 1. Introduction

## 1.1 What is this Report About?

This report is the result of Canadean's extensive market research covering the Ice Cream Market in Australia. It provides detailed segmentation of historic and future Ice Cream Market, covering key categories and segments. It also includes an analysis of the macro business environment and drivers of the market in Australia.

As such the report is an essential tool for companies active across the Ice Cream industry and for new players considering entry into Australia's Ice Cream market.

## 1.2 Definitions

All the data is collected in volume terms. Ice Cream Market refers to domestic Market only and includes imports. Please note that rounding errors may occur.

### 1.2.1 This report provides 2012 actual sales; while forecasts are provided for 2013 – 2017.

### 1.2.2 Category Definitions

**Table 1: Category Definitions - Ice Cream Market**

| Category | Segment | Definition |
|---|---|---|
| Artisanal Ice Cream | | Artisanal Ice Cream - Ice cream manufactured by small local producers for sale on the premises. Includes impulse and take-home sales, but not on-the-premises consumption. |
| Impulse Ice Cream | Dairy-Based (Impulse Ice Cream) | Dairy- or vegetable oil-based ice cream products purchased for immediate consumption. Includes single-serve ice cream tubs, packaged cones (e.g. Cornetto), ice cream sandwiches, and chocolate-coated ice creams (e.g Magnum). Includes low fat dairy and oil-based products (other than frozen yogurt). |
| | Water-Based (Impulse Ice Cream) | Water-based frozen desserts purchased for immediate consumption. Includes single serve sorbet/sherbert tubs and ice lollies e.g. Calippo |
| Take-Home Ice Cream | Dairy-Based (Take-Home Ice Cream) | Dairy- or vegetable oil-based ice cream intended for consumption in the home, as opposed to an impulse purchase for immediate consumption. Includes multiple-serving ice cream tubs (e.g. Ben & Jerry's, Carte d'Or, Häagen-Dazs) and, ice-cream cakes (e.g. Vienetta). Includes low-fat dairy- and oil-based products (other than frozen yogurt). |
| | Water-Based (Take-Home Ice Cream) | Water-based frozen desserts intended for consumption in the home, as opposed to an impulse purchase for immediate consumption. Includes single serve sorbet/sherbert tubs and ice lollies e.g. Calippo |

Source: Canadean © Canadean

### 1.2.3 Distribution Channel Definitions

**Table 2: Distribution Channel Definitions - Ice Cream Market**

| Distribution Channel | Definition |
|---|---|
| Cash & carries & warehouse clubs<br>(Cash & Carry) | Cash & carries sell from a wholesale warehouse to customers (small retailers, professional users) who pay on the spot and transport goods away themselves. Warehouse clubs are no-frills stores that sell discounted goods to members who pay an annual fee. Delivered wholesale sales are not included. In our data only sales from these stores direct to the public (for example through work place deals allowing otherwise regular consumers to shop there) are covered. Example: Makro, Metro, Costco, Sams Club |
| Discount, variety store & general merchandise retailers<br>(Dollar Stores) | Dollar Stores, Variety Stores & General Merchandise Retailers - A variety store or price-point retailer (including Dollar stores) is a retail store that sells inexpensive items, often with a single price for all items in the store, or a general low price policy. Typical merchandise includes cleaning supplies, toys, household goods and gardening equipment, basic foods and beverages. A general store, general merchandise store, or small town store carries a (broad) general line of merchandise, often in a medium (and sometimes small) store format, serving the needs of either the surrounding town or rural area. They differ from convenience stores or corner shops in that it will be the main shop for the community rather than a convenient supplement and typically carries a broader product line. Example: 9 to 9 Dollar Shop. |
| Convenience stores & gas stations<br>(Convenience stores) | Convenience Stores - Includes all sales through stores of an area generally less than 300 sq m, that specialize in a limited range of food & grocery products designed primarily for consumers with top-up shopping needs. Also includes sales in retail outlets attached to gas stations, where fuel is the main revenue driver, kiosks, and newsstands. This also includes small independent retailers, particularly those present in countries such as China and India. |
| Department stores<br>(Department stores) | Department Stores - Includes all sales through multi-category retailers, focusing primarily on non-grocery categories with distinct departments specializing in defined product areas. Examples include Bloomingdale's, Macy's, John Lewis and El Corte Ingles. |
| Hypermarkets & supermarkets<br>(Hyper/ Super Markets) | Hypermarkets& Supermarkets (incl. discounters) - Hypermarkets/mass merchandisers include all sales through retailers with floor area over 2,500 sq m that carry full lines of both grocery and general merchandise (e.g. Walmart). Supermarkets include all sales through retailers with a floor area of 300 sq m -2,500 sq m that offer a wide, departmentalized range of groceries, and may carry some general merchandise lines (e.g. Sainsbury's, Kroger). It also includes hard grocery discounters such as Walmart. |
| Vending machines<br>(Vending machines) | Vending machines - Includes paid-for sales from all vending machines not located within a store (e.g. public places, workplaces, pubs & Bars). |
| Drug stores & Pharmacies<br>(Pharmacies) | Drug stores & Pharmacies - Stores licensed to dispense prescription (Rx) and over-the-counter (OTC) healthcare products and where these sales account for the majority of revenues. Also known as Drug store and Health store. This channel does not include supermarkets with pharmacy counters. Example: Hetro and Apollo pharmacies in India. |
| Food & drinks specialists<br>(Food & drinks specialists) | Food & drinks specialists - Includes bakers, butchers, delicatessens, drinks specialists, fishmongers, greengrocers, Food & drinks only stores, and single category stores (e.g. stores selling only cheese, or only olives, or only honey, or only Confectionery products) Example : Amul Dairy shops In India. |
| eRetailers<br>(eRetailers) | eRetailers - Includes all sales that take place over the internet, irrespective of whether the vendor is a pure-play internet company or the online offering of a physical retailer. Example: Amazon, SPAR and FutureBazaar.com in India. |

**Table 2: Distribution Channel Definitions - Ice Cream Market**

| Distribution Channel | Definition |
|---|---|
| Health & Beauty Stores | Retailers that generate the majority of their revenue through a specific product type. In the personal care market, this includes specialist stores other than drugstores. Example: Boots in UK, Himalaya In India. |
| Other general retailers (Others) | Others - Includes other generalist retail channels not included in the categories above (e.g. market traders, charity stores, student union stores, direct sales, and Duty Free shops). |

Source: Canadean © Canadean

### 1.2.4 Volume Units and Aggregations

**Table 3: Volume Units for Ice Cream Market**

| Market | Category | Units |
|---|---|---|
| Ice Cream | Artisanal Ice Cream | Kg m |
| | Impulse Ice Cream | Kg m |
| | Take - Home Ice Cream | Kg m |

Source: Canadean © Canadean

### 1.2.5 CAGR Definition and Calculation

Compound Annual Growth Rate (CAGR) is the year-over-year growth rate of a value over a specified period of time.

**For this report, CAGR for historic time period is Calculated from 2007-2012, as**

CAGR = (( 2012 Value / 2007 Value ) ^ ( 1 / (2012-2007)) ) - 1

**CAGR for forecast time period is Calculated from 2012-2017, as**

CAGR = (( 2017 Value / 2012 Value ) ^ ( 1 / (2017-2012)) ) - 1

**For Brand Analysis and Distribution Channel Analysis, CAGR is Calculated from 2009-2012, as**

CAGR = (( 2012 Value / 2009 Value ) ^ ( 1 / (2012-2009)) ) - 1

### 1.2.6 Graphical representation of Brands

Top 10 brands are considered for each category in the market subject to availability of such data. Brand analysis charts are displayed only for categories where data is available for more than two brands.

### 1.2.7 Exchange Rates

All research is conducted in local currency in nominal prices. US dollar conversions for all historic data and for the latest year of actual data (2012 in this report) are made using an annual average exchange rate. For details please refer to table below. As we do not forecast exchange rates, the forecast data (from 2013 to 2017) is converted using a fixed 2012 exchange rate. As a result, annual growth rates for historic data will differ between local currencies and US dollar conversions, whereas they will be the same for forecasts.

**Table 4: Australia Exchange Rate AUD – USD (Annual Average), 2007 – 2012**

| Currency | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 |
|---|---|---|---|---|---|---|
| AUD – USD | XXXX | XXXX | XXXX | XXXX | XXXX | XXXX |

Source: Canadean © Canadean

### 1.2.8 Methodology Summary

In order to create the data for all the reports in this series and ensure its robustness, a comprehensive and empirically robust research methodology has been adopted. This combines both a large-scale program of industry research with the results of extensive primary industry interviewing and calling. Furthermore, all definitions are standardized across products and countries to ensure comparability.

The two main research methods, secondary research and primary research (the program of interviewing industry contacts), are brought together and because both sets of research processes have been designed in conjunction with each other they can be combined and consolidated into the final, integrated data sets.

The secondary research process involves covering publicly available sources, trade associations, specialist databases, company annual reports, and industry publications. While primary research involves a major program of interviewing leading industry executives for each category covered in each country – all with local country experts; typically brand, product and marketing managers for major brands within each country. These processes help analysts in capturing both qualitative and quantitative information about the market.

The final stage of the process is the triangulation of inputs obtained from all the research methods with the analyst's own understanding of the market in order to finalize the data. Once the data is finalized, it goes through various top level quality checks prior to publishing.

# 2. Australia Ice Cream Market Analysis, 2007–17

## 2.1 Ice Cream Value Analysis, 2007–17

### 2.1.1 Overall Ice Cream Market Value, 2007–17

**Table 5: Australia Ice Cream Market Value (AUD m) and Growth (Y-o-Y), 2007–17**

| Category | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 |
|---|---|---|---|---|---|---|---|---|---|---|---|
| Market Value | | | | | | | | | | | |
| Y-o-Y growth | | | | | | | | | | | |

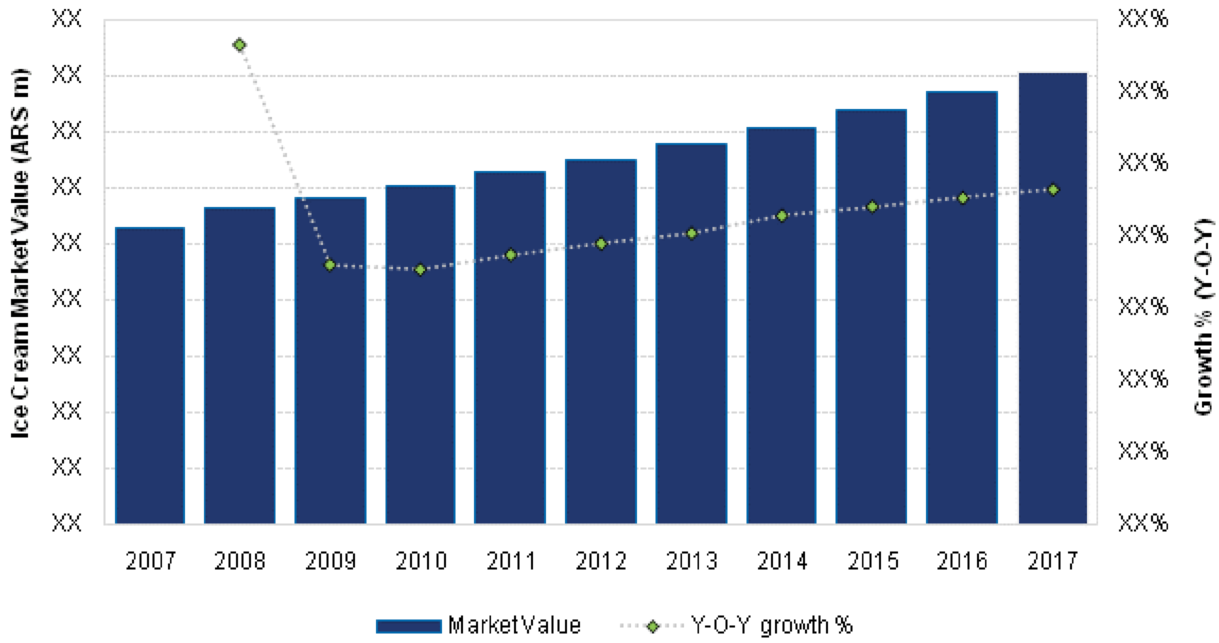
Source: Canadean © Canadean

**Table 6: Australia Ice Cream Market Value (USD m) and Growth (Y-o-Y), 2007–17**

| Category | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 |
|---|---|---|---|---|---|---|---|---|---|---|---|
| Market Value | | | | | | | | | | | |
| Y-o-Y growth | | | | | | | | | | | |

Source: Canadean © Canadean

**Figure 1: Australia Ice Cream Market Value (AUD m) and Growth (Y-o-Y), 2007–17**




Source: Canadean © Canadean

## 2.1.2 Ice Cream Market Value by Category, 2007–17

**Table 7: Australia Ice Cream Market Value (AUD m) by Category, 2007–12**

| Category | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | CAGR 2007–12 |
|---|---|---|---|---|---|---|---|
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |

Source: Canadean © Canadean

**Table 8: Australia Ice Cream Market Value (AUD m) by Category, 2012–17**

| Category | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | CAGR 2012–17 |
|---|---|---|---|---|---|---|---|
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |

Source: Canadean © Canadean

**Table 9: Australia Ice Cream Market Value (USD m) by Category, 2007–12**

| Category | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | CAGR 2007–12 |
|---|---|---|---|---|---|---|---|
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |

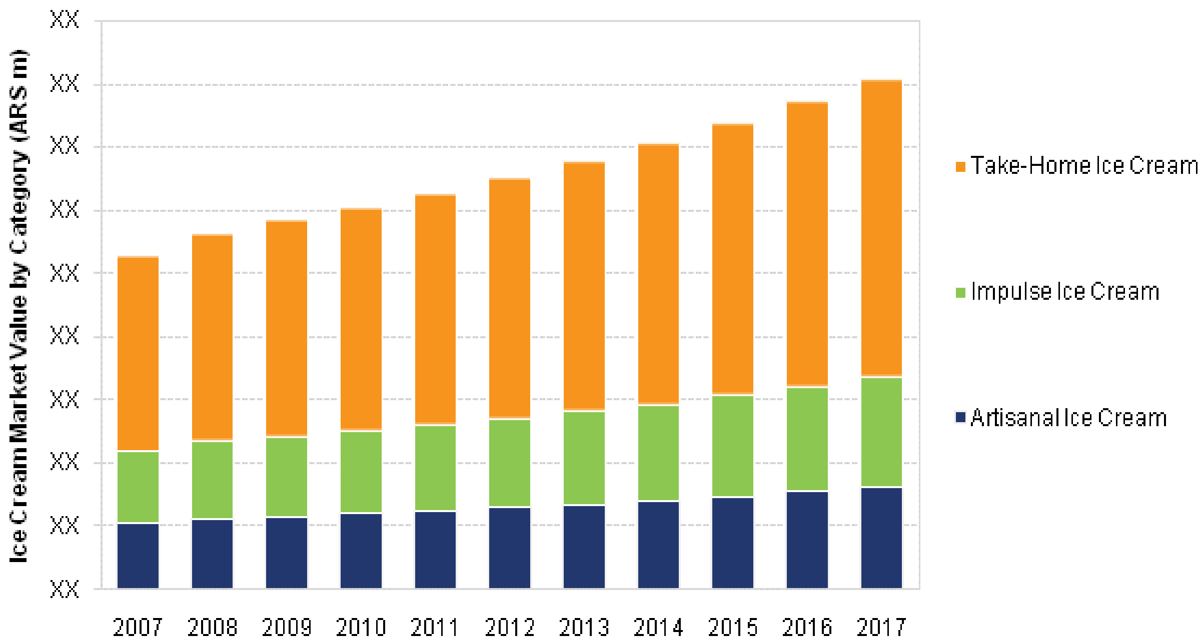
Source: Canadean © Canadean

**Table 10: Australia Ice Cream Market Value (USD m) by Category, 2012–17**

| Category | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | CAGR 2012–17 |
|---|---|---|---|---|---|---|---|
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |

Source: Canadean © Canadean

**Figure 2: Australia Ice Cream Market Value (AUD m) by Category, 2007–17**




Source: Canadean © Canadean

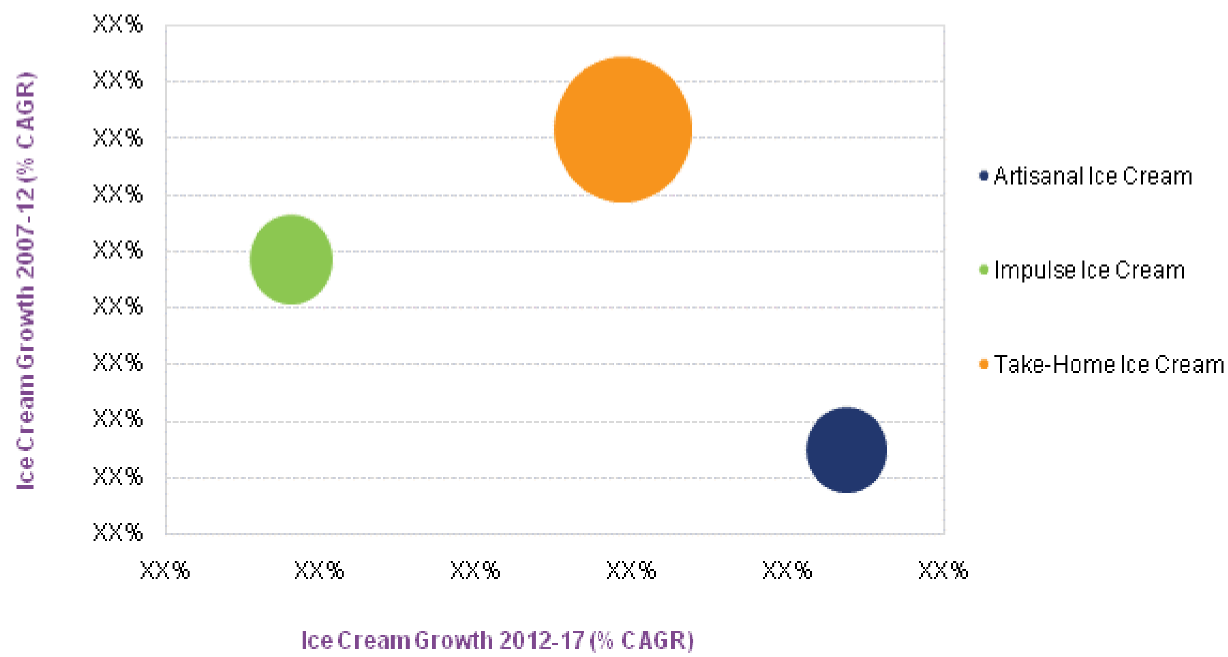
### 2.1.3 Market Growth Dynamics by Value – Ice Cream, 2007–17

**Table 11: Australia Ice Cream Market Dynamics: past and future growth rates (2007–12 & 2012–17) and market size (2007, 2012 & 2017), by Category, by Value (AUD m)**

| Category | CAGR 2012–17 | CAGR 2007–12 | Market Size 2007 | Market Size 2012 | Market Size 2017 |
|---|---|---|---|---|---|
| | | | | | |
| | | | | | |
| | | | | | |

Source: Canadean © Canadean

**Figure 3: Australia Ice Cream Market Dynamics, by Category, by Market Value, 2007–17**

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