Example table of contents

Definitions
- Category classifications
- Demographic definitions
- Summary methodology
- Trend framework

Market context
- Drivers and inhibitors of consumption
- Overall market value, (US$ millions), 2008–2018
- Overall market volume, (millions of KG), 2008–2018
- Number of consumption occasions in 2012, by gender
- Number of consumption occasions in 2012, by age
- Global country comparison of market value and growth, (US$ millions), 2008–2018
- Global country comparison of market volume and growth, (millions of KG), 2008–2018
- Volume of sold globally and forecast CAGR over the period 2013–2018 (size of bubble denotes market volume)

Demographic cohort consumption patterns
- Breakdown of consumption occasions 2012, by gender
- Over/under consumption compared to the proportion of society represented
- Breakdown of consumption occasions 2012, by age group
- Over/under consumption compared to the proportion of society represented
- Breakdown of consumption by whether it is the result of heavy, medium or light consumption, by gender, 2012
- Breakdown of consumption by whether it is the result of heavy, medium or light consumption, by age group, 2012

Consumer trend analysis
- Level of influence each trend has on overall consumption, by volume, 2013
- Level of influence each trend has on overall consumption across the globe, by volume, 2013
Consumer trend analysis - continued

- The Changing Lifestyle mega-trend
- The Connectivity mega-trend
- The Convenience mega-trend
- The Ethics mega-trend
- The Experience & Enjoyment mega-trend
- The Health & Wellness mega-trend
- The Individuality mega-trend
- The Trust mega-trend
- The Value mega-trend

Innovation examples

- Innovative country-specific launches in the sector
- Innovative global launches in the sector

Recommended actions

- Recommendations for manufactures, marketers and retailers

Appendix

- An explanation of the sub-trends
- Detailed methodology
- About Canadean
Reasons to buy this report

This report brings together consumer analysis and market data to provide actionable insight into the behavior of consumers. This is based on Canadean’s unique consumer data – developed from extensive consumption surveys and consumer group tracking – which quantifies the influence of 20 consumption motivations within your industry.

Consumer trends analysis
An overview of the key demographic groups driving consumption in your industry, and what their motivations are for doing so. This enables the reader to identify the most important trends within the market and also determine whether beliefs over what influences consumer behavior within the category are accurate.

Market sizing
Market value and volumes are given over 2008–2018 for 10 leading countries across the globe. Coverage includes major European markets, the US, and the emerging markets of Brazil, Russia, India, and China.

Demographic analysis
Key demographic groups driving consumption within the UK market are identified. The figures showcase the number of Dairy occasions attributed to specific age groups and genders, as well as identifying whether these demographic groups "over" consume in the category.

Product innovation examples
Examples are provided of innovative international and country-specific product development within your industry, with analysis of how these products effectively target the most pertinent consumer need states.

Recommended actions
Strategic recommendations of how to capitalize on the evolving consumer landscape are offered, allowing product and marketing strategies to be better aligned with the leading trends in the market.

Future outlook
The report provides insight to highlight the "so what?" implications behind the data, and analysis of how the need states of consumers within your industry will evolve in the short-to-medium term future.
The UK has the second highest per capita volume of consumption among major markets

The UK has the second highest volume consumption globally: The UK Ice Cream market is second largest among the major European markets in terms of volume, and reports the highest per capita consumption among the same. Although the UK has the highest per capita volume consumption in Europe, it remains far behind the US, which indicates room for growth for Ice Cream manufacturers. The UK Ice Cream market is forecast to grow at a CAGR of XX% during 2013–2018, driven by rising demand for hybrid and premium products and an increased willingness among UK consumers to trade up to decadent offerings when treating themselves.

Per capita Ice Cream occasions in the UK are the second highest among major markets: An average UK consumer enjoys XXX Ice Cream occasions per year, which is the second highest across major global markets. This demonstrates a high demand and receptiveness for Ice Cream in the UK, with consumers enjoying it regularly.
Ice creams positioned as healthier options face competition from the frozen yogurt category and its surrounding health halo

Degree of influence the Health & Wellness mega-trend has on demographic groups

Gender

Neither men nor women are motivated to seek healthy Ice Cream, with the need influencing just XX% and XX% of their consumption respectively. This shows both genders will opt for other categories when looking for healthier food options.

Age groups

Pre-Mid-Lifers experience the greatest percentage of consumption motivated by the desire for health, at XX%. This is due to consumers in this age group becoming parents and re-evaluating their diets as they embrace this new lifestage, cutting down on high sugar or fat items. However, this figure is low, showing consumers are not overly concerned about this.

How the Health & Wellness mega-trend will evolve

Health currently has the greatest influence in the consumption of Impulse Ice Cream, at XX%. This is due to consumers looking to this category to limit portion control, with consumers becoming more aware of the negative health effects the sugar and cream ingredients can have. However, this will continue to have limited influence on the consumption of Ice Cream as consumers value indulgence over anything else.

Ice Cream manufacturers will witness strong competition from frozen yogurt, which acts as a healthier yet equally indulgent offering, thus causing restricted room for healthy Ice Cream to succeed. Yogurt products are surrounded by a health halo that Ice Cream lacks, with consumers more likely to find health claims such as ‘fat-free’ and ‘low in calories’ credible in frozen yogurt than in ice cream.
Manufacturers are innovating across categories to target the growing needs of UK consumers

**Innovative UK launches in the Ice Cream sector**

<table>
<thead>
<tr>
<th>Brand: Kit Kat</th>
<th>Manufacturer: R&amp;R Ice Cream</th>
<th>Launched: UK, 2014</th>
<th>Trend: Personal Space &amp; Time</th>
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<tr>
<td>European Ice Cream major R&amp;R Ice Cream has launched a new type of hybrid impulse product. This KitKat Ice Cream offers a break on-the-go with a Kit Kat crispy wafer finger center, and Ice Cream cone.</td>
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<td>R&amp;R Ice Creams Company launched limited edition Crème Egg Mini Cones to coincide with Easter. These mini cones consist of Cadbury chocolate-covered ice cream with an orange fondant center to mimic the popular Crème Egg, and are served on a wafer cone.</td>
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<td>European Ice Cream major R&amp;R Ice Cream has launched a new type of hybrid Ice Cream product. The sandwich is filled with vanilla Ice Cream, scattered with Oreo cookie crumbs, and layered between two cocoa biscuits.</td>
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<td>Unilever’s Ben &amp; Jerry’s brand recently added two new flavors to its Ice Cream product line: Peanut Butter Cup and All or Nut-ting (chocolate and hazelnut). The company highlights the ethical sourcing of its products alongside their indulgent taste offering.</td>
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Manufacturers should address UK consumers’ desire for the best value products and guilt-free indulgence

Manufacturers can explore the Ice Cream market with more value for money products:

Many consumers will continue to seek brands that offer better value for money along with premium products. Although the UK has high disposable income and a large middle class population with better purchasing power, a large base of consumers still seek good value products. A large segment of the market is being dominated by private labels that offer consumers more for their money and manufacturers should explore budget ranges to seize the opportunities that exist.

**Product:** Banoffee Neapolitan Ice Cream  
**Manufacturer:** Asda

This 2l tub of ice cream is part of Asda’s private label range – Chosen By You – offering a twist on classic Neapolitan style Ice Cream. It is big enough to feed the whole family and more.

Manufacturers can launch healthier products to win back consumers opting for frozen yogurt:

Manufacturers should aim to win back consumers who have migrated to frozen yogurt for its guilt-free quality by offering healthier, equally indulgent versions of Ice Cream. Rising health-consciousness among British consumers is leading to rising demand for low fat and fat-free products in the UK. This generates large scope for manufacturers to cater to these consumers by launching “better for you” products with fat free labeling, providing they also communicate no loss in taste to the consumer.

**Product:** Smooth Vanilla  
**Manufacturer:** Swedish Glace

This Ice Cream is free from ingredients such as dairy, eggs, gluten, and lactose - meaning health conscious consumers as well as those with special dietary needs can enjoy guilt-free indulgence.
### MARKET DATA

- **Method**: analyst triangulation of consensus numbers based upon comprehensive primary and desk research as part of an international research programme.

- **Coverage**:
  - 50 Countries fully researched
  - Category and segment breakdown
  - Eight channels
  - Value and Volume data
  - Internationally comparable data
  - 100% standardized definitions

### CONSUMER DATA

- **Method**: extensive consumption surveys and consumer group tracking with strict age and gender quotas to ensure nationally-representative results.

- **Coverage**:
  - 10 Countries
  - 20 Consumer Trends
  - 26 Consumer Groups
  - Category breakdown
  - Integrated market sizing at the country and category level
  - Interim 2013 Consumer data generated by mapping 2013 Market size data onto 2012 Consumer data consumption values

Details on the methodology for both of these research programs can be found in the Appendix.
Consumer Trends Analysis: Understanding Consumer Trends and Drivers of Behavior in the Brazilian Dairy Food Market

Brazilians select Dairy products based on their ability to meet age-specific needs. This doesn’t just apply to children, with Older Adults increasingly aware of their specific nutritional needs. Although poverty rates have declined rapidly in Brazil, the low income of many consumers means they will seek out the best value for money products.

Consumer Trends Analysis: Understanding Consumer Trends and Drivers of Behavior in the German Bakery & Cereals Market

Indulgence is the primary driver of the German Bakery & Cereals market, motivating over two-fifths of consumption. The need is high in all categories, but peaks in the consumption of cookies and cakes with consumers perceiving these as the go-to categories for decadent, tasty treating where they desire rich taste experiences and novel texture combinations.

Consumer Trends Analysis: Understanding Consumer Trends and Drivers of Behavior in the UK Savory Snacks Market

As an effect of the recessionary environment in the country, people are eating out less and entertaining more at home, engaging in indulgent snacks as an affordable treat to offer friends and family. Savory Snacks are relatively low cost, even for more premium offerings, making them an attractive way of treating oneself regardless of the occasion.