



BRITISH FROZEN FOOD FEDERATION RETAIL ICE CREAM MARKET

Source: TNS Worldpanel



| 52 Weeks Ending | Value £'Million | YOY % | Volume Tonnes | YOY % |
|-----------------|-----------------|-------|---------------|-------|
| 2.12.07 | 600 | -1.8 | 329,863 | -4.5 |
| 10.09.07 | 593 | -1.6 | 330,019 | -3.6 |
| 17.06.07 | 615 | 4.5 | 347,092 | 4.1 |
| 25.3.07 | 611 | 6.3 | 344,244 | 4.9 |
| 3.12.06 | 611 | 5.5 | 345,506 | 4.4 |
| 10.09.06 | 603 | 4.1 | 342,234 | 3.4 |

The ice cream market traditionally has been in long-term growth led by premium brands and heavy weight marketing activity. The traditional tub part of the market has fared less well as consumers have traded up to premium products.

The story of last year was sadly all about the horrendous weather with the picture of a Unilever ice cream storage facility submerged in water to be one of the abiding and saddest memories on record.

The market has seen further consolidation with the merger of Richmond and Roncadin to form R&R Ice Cream. The sale of Birds Eye to Permira has allowed Unilever to concentrate wholeheartedly on their ice cream interests whilst the frozen food market has benefited from the focus that Birds Eye have brought to it.

BFFF
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