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Cool & Hot

Above ¾ of Bulgarians aged 15+ consume ice-cream



According to the national representative Omnibus survey conducted by GfK Bulgaria in May 2010 among the population aged 15+, above ¾ of Bulgarians consume ice-cream. Impulsive products for individual consumption are pointed as the most often consumed by 62,6% of the respondents.

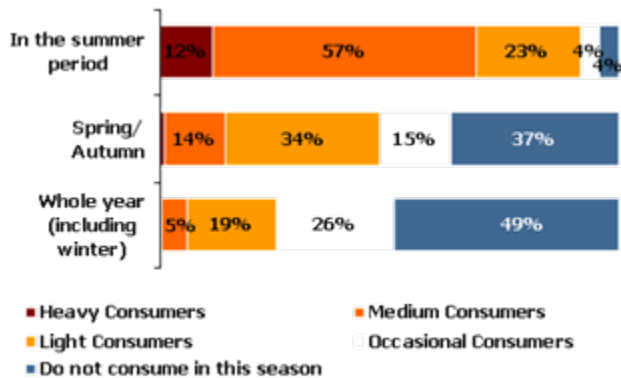
The biggest is the share of those who consume impulsive ice-cream products (cones & sticks), followed by those who consume ice cream mainly in family packs, while the share of those consuming ice-cream in the single cups is the smallest one.

Ice-cream consumers: Who they are?

Ice-cream consumers are predominantly female, singles and those aged 15-49.

The share of those who consume ice-cream on a weekly basis during the summer is about 70%. In the summer period ice-cream is consumed about 8 times per month, while during the spring and autumn less than twice monthly.

How often they do it?



Base: N=764; Ice-cream consumers



Consumption through the seasons

Ice-creams in a single package are seen mostly as a product that can be consumed only in summer.

Ice-creams in a family pack are perceived more as a product that can also be eaten in spring and autumn or throughout the year.

Purchase & Consumption patterns

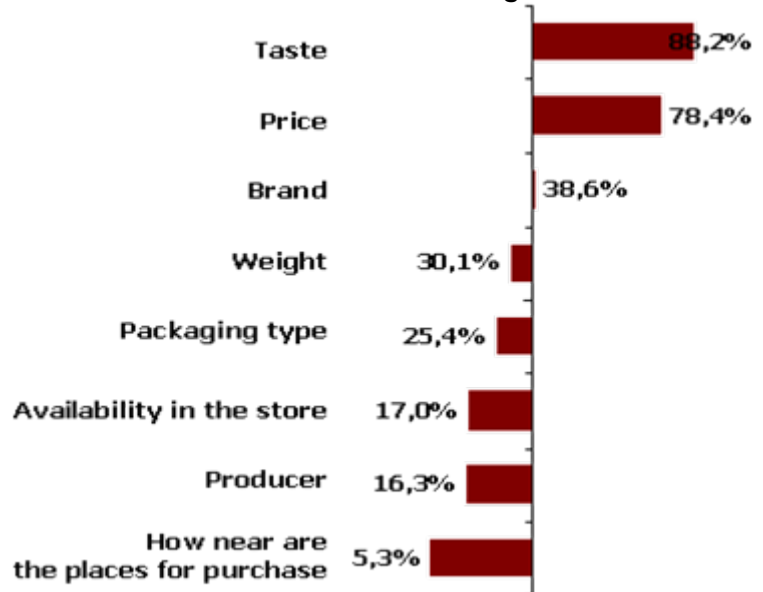
Purchase Drivers: Taste & Price

Consumption Needs: Refreshment & Pleasure

Taste is a main driver for the choice of ice-cream. Price is listed as the second most important factor influencing purchasing decision.

As the most important reason for the consumption of ice cream stands desire for something refreshing and the pleasure resulting from the consumption. The choice of brand and type of ice cream most often occurs at the point of purchase, depending on what is offered there. Loyalty in terms of flavors, brands and producers of ice cream is low. Ice cream is bought mainly in super and mini markets.

Purchase Drivers ranking index



Base: N=764; Ice-cream consumers

Contact

GfK Bulgaria
86 Ekzarh Iosif Str.
Sofia 1527
Tel. +359 2 930 86 00
Fax +359 2 930 86 86
E-Mail: info.bulgaria@gfk.com

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GfK Bulgaria Success Factors



Respondents mind set: on average 3 ice-cream brands come to the respondents mind spontaneously when hearing the word "ice-cream"

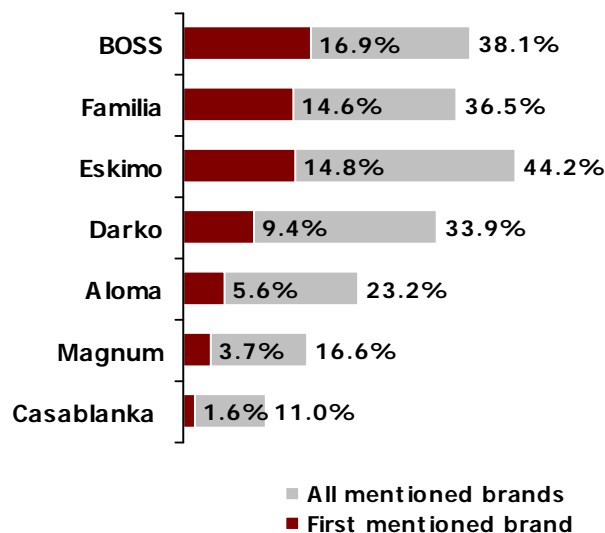
Awareness & Brand Perception

In the minds of respondents Boss and Familia brands are associated at greater extent with the category "ice cream" (have the highest awareness quality index).

Best Brands:

Boss is listed as the best ice cream brand. Familia is pointed as second-best brand offering ice-cream on the market.

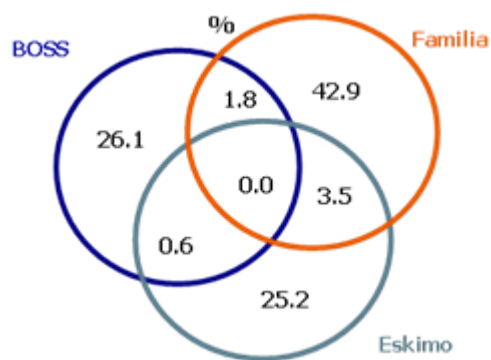
The brand BOSS reveals typical premium brand behavior - the share of those who consider Boss the best brand is much greater than the share of those who consume it most often.



Base: N=1000 All respondents; 15+ national representative

Consumption across brands:

Familia & Eskimo are the most often consumed brands



Base: N=153, Respondents who have consume any of the 3 brands in the last month

As regards of ice cream brands consumption, Familia, Eskimo, Boss and Darko are the leaders. About 20% of all interviewed consumers consume any of the three brands BOSS, Familia and/ or Eskimo in the last month. Very low overlap could be explained within the different price segments (BOSS vs. Eskimo) and different packaging formats (BOSS, Eskimo vs. Familia). Familia is the brand with the highest share of exclusive consumers (42.9%)

With the heating of the promo & advertisement battles in the high summer season it could be expected that the share of BOSS exclusive consumers will increase.

Ice cream consumption in the household



During the warm months of 2009 households consumed 14 times greater quantity of ice cream at home compared with the the cold ones, as the most intensive purchasing is recorded in the third quarter.

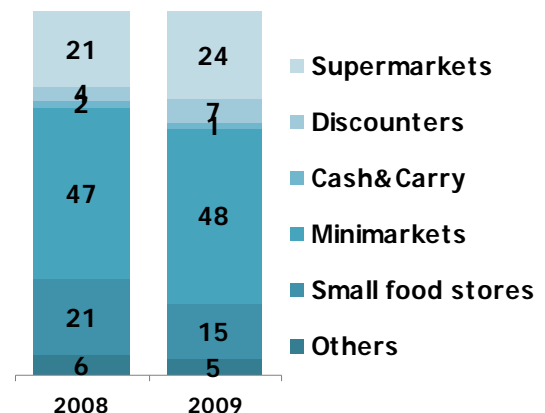
Pack size

Ice-creams with pack between 500-1000 grammes are consumed mostly at home, but packs more than 1 kg are increasingly preferred by households with a share of 21 percent in value in 2009 while at 18% the previous year.

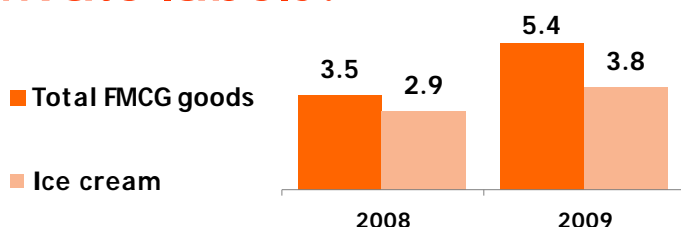
Modern trade is increasingly preferred in the ice cream category

The most preferred type of store to purchase ice cream for in home consumption are minimarkets, which in 2009 hold 48% of market in value. Still less represented in the category are the small food stores, at the expense of modern trade.

Supermarkets last year were presented with 24% of spendings and the share of discounters is doubled, reaching 7%. When it comes to preferred chain, Billa and Kaufland (represented by 6.4% in value) are with largest share.



Private labels?



Despite the intense growth of discounters in the category of ice cream, in regards to their own brands, this dynamics is less pronounced, their share increased by less than 1% in annual base.