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Innovation in Ice Cream

July 2022



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Ice Cream / July 2022

Summary of the big themes

Ice cream (tubs/cartons) attracts the most consumers – for now



- 86% of all frozen treat buyers purchase traditional ice cream tubs/cartons, exceeding the next closest segment by over 25%.
- Embracing snacking as a relevant meal part, developing exciting formats and incorporating trending flavors will help frozen novelties continue to earn penetration and steal share from the ice cream consumer base.
- Tough competition exists between the remaining segments, especially frozen yogurt, sherbet/sorbet and gelato. It's critical for each segment to identify an ownable corner of the market and audience – fruit flavors and young males present opportunity

Healthy alternatives are not sought by the mainstream frozen treat shopper



- Just 38% of frozen treat shoppers agree they like to try healthier versions of frozen treats, and the same portion agree they want to see healthier options for their kids.
- There is skepticism surrounding the health credentials of non-dairy frozen treats, and brands in the space should explore alternative sell points.
- For brands that wish to stay the course, strategies should focus on holistic wellbeing benefits, fruit flavors and high-income households



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Source: Mintel Global New Products Database (GNPD)





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Summary of the big themes *continued*



Consumers crave quality and exciting flavors and formats, even when it costs them more



- Premium leads among measured concepts that would encourage buyers to purchase more frozen treats, holding true even for consumers who describe their financial situation as less than healthy.
- Other leading concepts of interest (small formats, RTD milkshakes, ice cream pouches) point to the opportunity for frozen treats to continue earning a place in snacking occasions outside of dessert.
- Offerings that are ice cream parlor inspired, co-branded, non-sweet and seasonal can satisfy the flavor-first frozen treat shopper.

Consumer Perspective on Ice Cream Flavors

Ramp up the spice

As the world recovers from COVID-19, consumers are seeking enjoyment, which food and drink can provide in abundance. Ice cream brands should target innovation-seeking Millennials with flavor innovations. Spicy flavors pique the interest of consumers, but they are underrepresented in global ice cream launches.



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Van Leeuwen Hot Honey French Ice Cream

Said to taste like hot honey drizzled onto ice cream



Museum of Ice Cream Piñata Ice Cream

Described as vanilla ice cream with spicy mango and naturally flavored raspberry swirls



Humphry Slocombe Cornflake Crunch Ice Cream

A cereal milk ice cream with cornflake cookies.



Trader Joe's Maple Ginger Cookie Swirl Ice Cream

This kosher certified product retails in a 16-oz. pack.

Looking for the next nostalgic flavor

Cereal milk

Milk Bar restaurant's chef Christina Tosi launched the idea of using cereal-sweetened milk as an **ingredient in desserts**. The concept is spreading as **consumers eat cereals that remind them of their childhood**.

Pink lemonade

The **pink in pink lemonade** comes from a range of added ingredients, from extracts to real fruit. The pink is a fun element and gives the suggestion of summer, making the drink popular. **Nostalgia** transports it across categories.

Everything bagel

Originally created in the 1970s as a topping for bagels, the blend comprises white and black sesame seeds, sea salt, dried minced garlic, dried minced onion and poppy seeds.

Mulled cider

Like pumpkin spice, the warm spice blend in mulled cider **harkens back to home, family and holidays**. Mulled cider flavors can be found in a variety of beverages and savory preparations, as well as in sweet desserts.



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Taking pleasure in food and drink

For most consumers, food is more than sustenance; it is also an experience. Sharing food is even more than that: it is a pleasure.

Flavors that bring memories of the past or evoke feelings of family and community are transferable across categories.

Consumers will be familiar with the original concept (eg s'mores or pumpkin pie); a new category with a familiar flavor will not seem completely new.



The Future of Ice Cream *In five years and beyond*

Americas: flavors and healthier offerings

In North America, flavor remains a key ice cream attribute. Better-for-you options need to follow 'clean label' guidelines. In terms of more unusual flavor propositions, global retail launch activity shows that brands are incorporating Japanese flavors such as **wasabi, seaweed, sesame or hojicha**; however, most of them currently appear in Asia with far fewer elsewhere.



**Humphry Slocombe
Black Sesame Ice
Cream**



**Helados La Neta Classic
Horchata Ice Cream**
*Described as real-deal ice
cream inspired by Mexico.*



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KEY ATTRIBUTE

72% of US consumers claim that flavour is an important attribute when purchasing ice cream and frozen treats

BETTER-FOR-YOU

34% of US consumers would be motivated to try a frozen treat that is better for you (eg low calorie, low sugar)

Plant-based ice cream is often positioned as a **healthier alternative**. However, consumers often eat ice cream when they **need to improve their mood** and claim that **healthier varieties don't taste as good**. *Plant-based variants need to focus on flavor and taste enhancement in order to create more indulgent propositions. Packaging can also play an important role in reflecting the sophisticated and indulgent flavor of plant-based ice cream.*



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Americas: Taste reassurance and sugar reduction

Plant-based drinks are recording a faster rate of launch activity than other plant-based sectors in North America, and are focusing on **improved taste quality**. Meanwhile, launches with no added sugar have recorded a surge in activity in Latin America, as consumers seek more diet-friendly options.

Concerns around sugar intake have therefore been a catalyst for keto-friendly offerings. In the dairy alternative market, brands have been supporting keto followers with products that fit the diet's nutritional principles, primarily around zero/low carbs.

KETOGENIC DIET

36%

of US consumers have followed, or are interested in, the ketogenic diet



Rebel Black Raspberry Ice Cream

The natural, keto, low carb, high fat ice cream is free from GMOs, grain, gluten and added sugar, and provides 7g net carbs per pint.



Killer Creamery Jam Session Keto Frozen Dessert

Features a black raspberry flavor ice cream and dark chocolate chips



O'My! Cake Walk Flavored Dairy Free Gelato

Contains 2g of sugars per serving and is free from common allergens, GMOs, gluten and soy

The ketogenic (keto) diet has evolved beyond just another high-fat diet into a trendy lifestyle choice in North America. Part of the success has come from the diet's association with a range of health benefits, while eliminating carbohydrates such as sugar.



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Shrinking ice creams appeal to consumers

When consumers turn to small formats to limit their calories, they are seeking an indulgent product that does not compromise on taste. Over three in five (62%) of **US ice cream consumers** would rather eat a small amount of indulgent ice cream than more low-cal ice cream.

Mini ice creams tend to hover around the **40-60ml/g mark**, but brands are increasingly launching **smaller bites** under 25ml/g, albeit from a small base.

During the **Great Recession** – the global economic crisis of the late 2000s – consumers sought comfort from inexpensive indulgences like ice cream. In the years that followed, consumers were swayed by **miniature versions of their favorite ice creams** in a bid to seek comfort but limit unhealthy eating practices. This approach has lasted: a third of **US ice cream buyers** now consume mini format ice creams.

As the world recovers from the COVID-19 pandemic, consumer behavior is similarly driven by finances and health. A quarter (23%) of **US ice cream consumers** are buying ice cream more frequently but the **desire to buy smaller packs remains**.



Sundae Shoppe Vanilla & Caramel Double Dipped Mini Ice Cream Bars

Comprise vanilla ice cream dipped in a cocoa coating, caramel sauce and milk chocolate coating topped with caramel crunch pieces.



Little Something Foods Mad Minis Vanilla Ice Cream Cookie Sandwiches

Have been repackaged and are kosher certified, snack-size product provides just 60 calories per each



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Transportive ice cream presents a premium opportunity

Ice cream can transport consumers amid travel disruptions

Many people have not travelled during the pandemic due to lockdowns and concerns about quarantine costs. Ongoing concerns about COVID-19 also present a barrier to future travel.

Even as COVID-related concerns subside over the coming years, increasing consumer trepidation over sustainability will impact the travel industry. In the US, 38% of consumer say COVID-19 concerns will prevent them from traveling in 2022



**Helados Mexico
Premium Rompopo
Bolis Frozen Milk Bars**



**Gelato Fiasco Ripe Mango Alphonso
Mango Sorbetto Tropical**
The plant-based product contains no dairy, artificial growth hormones, high fructose corn syrup, artificial flavors or synthetic colors



**San Miguel Gold Label
Best of the Philippines
Collection Ube Purple
Yam Mellorine Ice
Cream**

Offering internationally inspired ice cream flavors and formats allows brands to charge more for something exotic and exclusive. Consumers have been willing to pay more for ice cream in recent years. The global average cost per 100ml/g of an **ice cream launch** has increased by 23% over the past five years, which is far higher than the increase across **most other food categories**.



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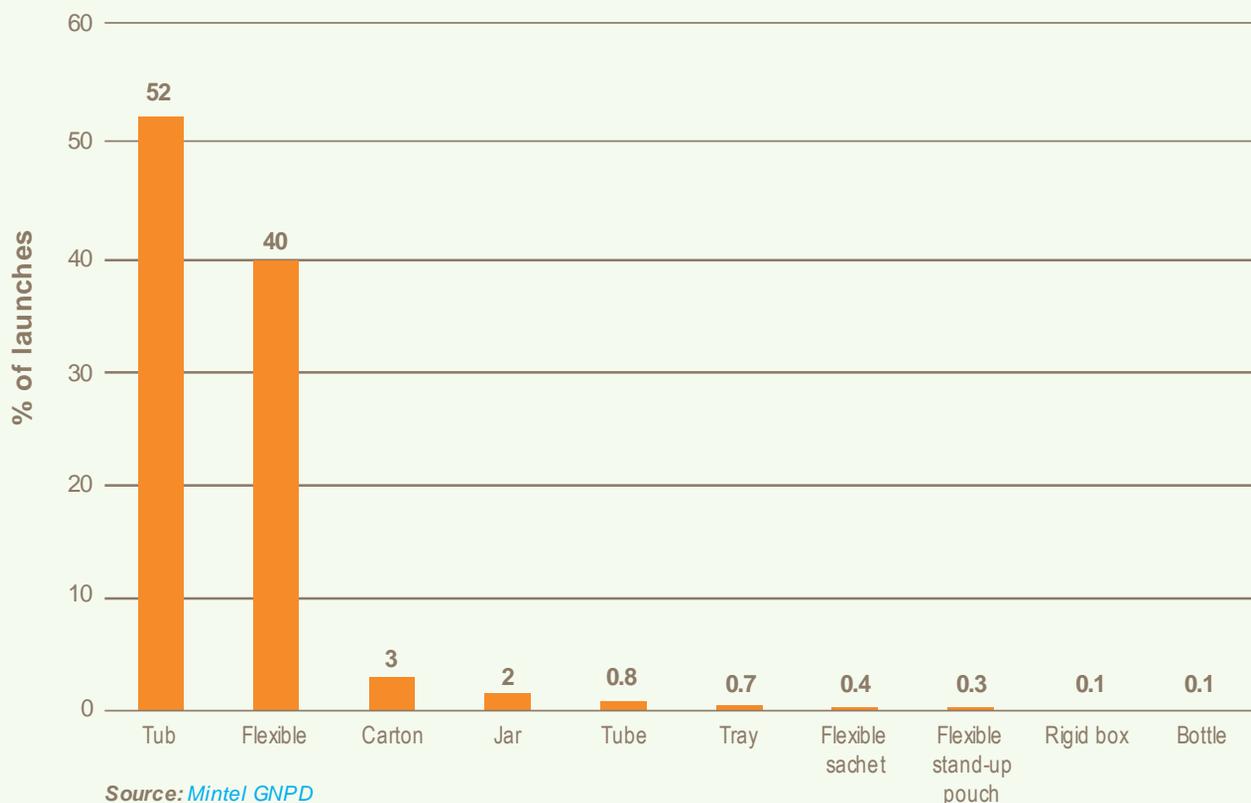
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Untapped potential of pouches in ice cream

Pouches are niche, but have the opportunity to shine

Tubs and flexible packaging dominate the ice cream category, but **pouches can create** new consumption occasions, offer different positioning and target wider consumer groups.

Global: new ice cream launches by pack type, Apr 2016-Mar 2021



Source: *Mintel GNPD*



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Klondike Shakes Sit Back & Strawberry Dairy Shakes

Described as a creamy, mess free and convenient shake to enjoy from the comfort of home or on the go



Pouches are a **common pack type for baby food**, allowing products to be eaten on the go and be safe for children. However, ice cream in pouches are rarely being positioned for children.

This offers potential to innovate, especially considering that **31% of US parents** claim that a kid-friendly attribute of frozen treats is important for them. Moreover, nearly three in 10 US parents say that they wish there were healthier ice cream options for their children.

INNOVATE

31%

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