

Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



Ice cream and frozen novelties eked out dollar sales growth of 10% from 2010-15 (zero growth when adjusted for inflation). The mature category remains popular with consumers; 90% of respondents to Mintel's custom consumer survey purchased frozen treats in a store in the past six months.

This report looks at the following areas:

- Sales of frozen treats sluggish
- Health plays a role in purchase, but consumers still want a treat

Recent listeria-related product recalls are not expected to hamper this engagement. Gelato and dairy alternatives appear as bright spots for the category, while frozen yogurt's popularity is on the decline. Whereas health plays a role in category participation, consumers turn to frozen treats as an indulgence, meaning balancing permissibility with enjoyment will be necessary.

BUY THIS REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533

> Brazil 0800 095 9094

Americas +1 (312) 943 5250

арас +61 (0) 2 8284 8100

EMAIL: reports@mintel.com

DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market



Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Table of Contents

Overview

What you need to know

Definition

Executive Summary

The issues

Sales of frozen treats sluggish

Figure 1: Total US retail sales and fan chart forecast of ice cream and frozen novelties, at current prices, 2010-20

Health plays a role in purchase, but consumers still want a treat

Figure 2: Statements related to frozen treats (health), March 2015

The opportunities

A focus on quality may help boost health perception

Specialty offerings and smaller brands find appeal

Figure 3: Frozen treat (ice cream, gelato, frozen custard) purchase at a supermarket, convenience store or other store, by generation, April 2015

Non-dairy meets interests as well as needs

Figure 4: Reasons for choosing non-dairy, April 2015

What it means

The Market – What You Need to Know

Sales of frozen treats projected to reach \$12.3 billion in 2015

Ice cream leads category sales, gelato helps to drive growth

Health plays a role in purchase, but consumers still want a treat

Foodservice competes for more specialty offerings, attracts young adults

Market Size and Forecast

Sales of ice cream and frozen novelties to reach \$12.3 billion in 2015

Figure 5: Total US retail sales and fan chart forecast of ice cream and frozen novelties, at current prices, 2010-20

Market Breakdown

Ice cream leads category sales, gelato helps to drive growth

Figure 6: Total US retail sales and forecast of ice cream and frozen novelties, by segment, at current prices, 2010-20

Figure 7: MULO sales of gelato and gelato-based novelties, at current prices, 2010-2015

Frozen yogurt is on a downward trend

Figure 8: Total US retail sales and volume sales of frozen yogurt/dairy alternatives, at current prices, 2010-15

Market Perspective

Health plays a role in purchase, but consumers still want a treat

Figure 9: Statements related to frozen treats (health), March 2015

Foodservice competes for specialty offerings, young adult appeal

Figure 10: Frozen treat purchase, by purchase location, April 2015

BUY THIS REPORT NOW

VISII: store.mintel.com CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094 Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100 EMALL: reports@mintel.com



Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 11: Frozen treat purchase, by generation, April 2015

Listeria scare impacts brand availability, but should spare the market

Figure 12: Statements related to frozen treats (safety), March 2015

Market Factors

Ice cream is popular for dessert, but in moderation Figure 13: Dessert consumption, April 2015

Figure 13: Dessert consumption, April 201

Key Players – What You Need to Know

Seven leading companies make up 63% of MULO sales in the category

Gelato continues to see strong growth

Frozen yogurt falling out of favor

Smaller brands see growth across most segments

Manufacturer Sales of Ice Cream and Frozen Novelties

Unilever pushes past Nestlé with Talenti acquisition

Blue Bell recall opens the door for other companies to grow

Figure 14: MULO sales of ice cream and frozen novelties, by leading companies (\$ million), rolling 52 weeks 2014 and 2015

What's Working?

Gelato continues to see strong growth

Non-dairy is a bright spot in frozen yogurt/dairy alternatives segment

Smaller brands see growth across most segments

Ben & Jerry's continues to go big

What's Struggling?

Frozen yogurt may be falling out of favor

Consumers aren't drawn to diet brands

Fruit-based treats struggle to meet sweet cravings

What's Next?

Hormone-free/allergen claims see strong growth in 2010-15 launches

Figure 15: Ice cream and frozen novelties launches, by leading claims, June 2010-May 2015

Flavor innovation aims for adult appeal

Теа

Coffee

Alcohol

International

Vegetables may work to boost health profile

Smaller pack sizes allow for price/calorie control

Figure 16: Statements related to frozen treats (size), March 2015

The Consumer – What You Need to Know

Millennials, Hispanics, parents appear as key consumers

BUY THIS REPORT NOW

VISIT: store.mintel.com CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094 Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100 EMAIL: reports@mintel.com



Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Sweet satisfaction and snackability lead reasons for purchase

Non-dairy meets interests as well as needs

Frozen novelties may suffer from being pigeonholed for kids

Frozen Treat Purchase

Millennials, Hispanics, parents show interest in smaller parts of the market

Figure 17: Frozen treat purchase at a supermarket, convenience store, or other store, by generation, April 2015

Will gelato and frozen custard go the way of frozen yogurt?

Figure 18: Frozen treat (ice cream, gelato, frozen custard) purchase at a supermarket, convenience store ,or other store, by generation, April 2015 Figure 19: Frozen treat purchase at a supermarket, convenience store, or other store, by Hispanic origin, April 2015

Figure 20: Frozen treat (ice cream, gelato, frozen custard) purchase at a supermarket, convenience store, or other store, by Hispanic origin, April 2015

Figure 21: Frozen treat purchase at a supermarket, convenience store, or other store, by parental status, April 2015

Sherbet, sorbet, ices, turnaround may be on the horizon

Figure 22: Frozen treat purchase at store - CHAID - Tree output, April 2015

Figure 23: Frozen treat purchase at store - CHAID - Table output, April 2015

Reasons for Purchase

Sweet satisfaction and snackability lead reasons for purchase

Figure 24: Reasons for purchase, by generation, April 2015

Shake positioning may be a cool move

Figure 25: Reasons for purchase (use), by generation, April 2015

Frozen Treat Traits

Single-flavor varieties rule

Figure 26: Frozen treat traits, April 2015

Customization and international flavors can match interests of key purchase groups

Figure 27: Statements related to frozen treats (flavor), by generation, March 2015

Local ingredients can be a consideration for future product development

Figure 28: Statements related to frozen treats (local ingredients), by generation, March 2015

Non-dairy meets interests as well as needs

Figure 29: Reasons for choosing non-dairy, April 2015

Perceptions of Frozen Treats

Frozen novelties may suffer from being pigeonholed for kids

Figure 30: Correspondence Analysis - Characteristics associated with frozen treats, April 2015

Figure 31: Characteristics associated with frozen treats, April 2015

Appendix - Data Sources and Abbreviations

Data sources Sales data Fan chart forecast Consumer survey data

CHAID methodology

BUY THIS REPORT NOW



Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

	rrespondence map methodol
	breviations and terms
Abbreviations	
ppe	endix – Market
	Figure 32: Total US retail sales and forecast of ice cream and frozen novelties, at current prices, 2010-20
	Figure 33: Total US retail sales and forecast of ice cream and frozen novelties, at inflation-adjusted prices, 2010-20
	Figure 34: Total US retail volume sales of ice cream and frozen novelties, by segment, 2010-15
	Figure 35: Total US retail sales and forecast of ice cream, at current prices, 2010-20
	Figure 36: Total US retail sales and forecast of ice cream, at inflation-adjusted prices, 2010-20
	Figure 37: MULO sales of gelato and gelato-based novelties, at current prices, 2010-20
	Figure 38: Total US retail sales and forecast of frozen novelties, at current prices, 2010-20
	Figure 39: Total US retail sales and forecast of frozen novelties, at inflation-adjusted prices, 2010-20
	Figure 40: Total US retail sales and forecast of frozen yogurt/dairy alternatives, at current prices, 2010-20
	Figure 41: Total US retail sales and forecast of frozen yogurt/dairy alternatives, at inflation-adjusted prices, 2010-20
	Figure 42: Total US retail sales and forecast of sherbet, sorbet, and ices, at current prices, 2010-20
	Figure 43: Total US retail sales and forecast of sherbet, sorbet, and ices, at inflation-adjusted prices, 2010-20
	Figure 44: US supermarket sales of ice cream and frozen novelties, at current prices, 2010-15
	Figure 45: US convenience sales of ice cream and frozen novelties, at current prices, 2010-15
	Figure 46: US sales of ice cream and frozen novelties through other retail channels, at current prices, 2010-15
Na	t ural channel sales Figure 47: Natural supermarket sales of frozen desserts, at current prices, rolling 52 weeks April 2013-April 2015
	Figure 48: Natural supermarket sales of ice cream and frozen desserts, by type, at current prices, rolling 52 weeks ending April 21, 2013 and April 19, 2015 Figure 49: Natural supermarket sales of frozen desserts, by organic ingredients, at current prices, rolling 52 weeks ending April 21, 2013 and April 19, 2015 Figure 50: Natural supermarket sales of organic frozen desserts, by segment, at current prices, rolling 52 weeks ending April 21, 20 and April 19, 2015 Figure 51: Natural supermarket sales of frozen desserts, by presence of alternative sweetener, at current prices, rolling 52 weeks ending April 21, 2013 and April 21, 2013 and April 21, 2013 and April 21, 2013 and April 19, 2015 Figure 52: Natural supermarket sales of frozen desserts, by GMO ingredients, at current prices, rolling 52 weeks ending April 21, 20 and April 19, 2015 Figure 52: Natural supermarket sales of frozen desserts, by GMO ingredients, at current prices, rolling 52 weeks ending April 21, 20 and April 19, 2015 Figure 53: Natural supermarket sales of frozen desserts, by fat content, at current prices, rolling 52 weeks ending April 21, 2013 and April 19, 2015 Figure 54: Natural supermarket sales of frozen desserts, by lactose-free labeling, at current prices, rolling 52 weeks ending April 21, 2013 and April 19, 2015 Figure 55: Natural supermarket sales of frozen desserts, by probiotic content, at current prices, rolling 52 weeks ending April 21, 2013 and April 19, 2015
ppe	endix – Key Players
	Figure 56: MULO sales of ice cream and frozen novelties, by leading companies, rolling 52 weeks 2014 and 2015
	Figure 57: MULO sales of frozen novelties, by leading companies and brands, rolling 52 weeks 2014 and 2015
	Figure 58: MULO sales of frozen novelties, by leading companies and brands, rolling 52 weeks 2014 and 2015
	Figure 59: MULO sales of frozen yogurt, by leading companies and brands, rolling 52 weeks 2014 and 2015
	Figure 60: MULO sales of sherbet, sorbet and ices, by leading companies and brands, rolling 52 weeks 2014 and 2015
	Figure 61: Frozen treats launches, by top 10 claims 2010-15*
	Figure 62: Ice cream launches, by top 10 flavors, 2010-15*
	Figure 63: Frozen novelty launches, by top 10 flavors, 2010-15*
	Figure 64: Frozen yogurt/dairy alternative launches, by top 10 flavors, 2010-15*

BUY THIS **REPORT NOW**



Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 65: Sherbet, sorbet, ices launches, by top 10 flavors, 2010-15*

BUY THIS REPORT NOW

VI SI T: store.mintel.com CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094 Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100 EMALL: reports@mintel.com

reports.mintel.com © 2015 Mintel Group Ltd. All Rights Reserved. Confidential to Mintel.