

# Ice Cream and Frozen Novelties: Incl Impact of COVID-19 - US - April 2020

Report Price: £3695 | \$4995 | €4400

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

## This report looks at the following areas:

- Category lags behind other snack and dessert categories
- Heavy engagement relies on parenthood
- There's a disconnect in BFY attitudes vs offerings

The \$13.7 billion ice cream and frozen novelties category has experienced modest growth over the last year and slow to no growth was expected to continue into 2024. Yet, like many other food and drink categories, the sheltering in place stages of the pandemic are proving to be a tailwind for the mature and crowded category. And, the easing of those mandates will likely lead into the primary seasonal summer months where the category naturally flourishes. While ice cream and frozen novelties may not necessarily be considered an essential, brands can still become a self-care partner during this time and in, perhaps more importantly, the subsequent fallout.



Ice cream and frozen novelty brands can be sources of support in both the short term and the undoubtedly challenging days ahead. In the now, consumers are likely to want familiar and comforting foods making this an opportunity for brands to connect.

– Kaitlin Kamp, US Food and Drink Analyst

## Buy this report now

Visit [store.mintel.com](https://store.mintel.com)

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

## Table of Contents

### OVERVIEW

- **What you need to know**
- **Key issues covered in this Report**
- **Definition**

### EXECUTIVE SUMMARY

Figure 1: Short, medium and long term impact of COVID-19 on ice cream and frozen novelties, April 2020

Figure 2: Total US retail sales and forecast of ice cream and frozen novelties, at current prices, 2014-24

- **The issues**
- **Category lags behind other snack and dessert categories**  
Figure 3: US retail sales and forecast of ice cream and frozen novelties, salty snacks and cookies, % change in sales growth, 2015-2019

- **Heavy engagement relies on parenthood**  
Figure 4: Household ice cream and frozen novelties consumption, repertoire, by parental status, January 2020

- **There's a disconnect in BFY attitudes vs offerings**  
Figure 5: Ice cream and frozen novelties attributes, January 2020

- **The opportunities**
- **Adapt to shifting ways of food and drink shopping**
- **Keep it simple, functional**

Figure 6: Ice cream and frozen novelties attitudes, January 2020

- **Make novelties an adult occasion**  
Figure 7: Ice cream and frozen novelty associations, January 2020

- **Remain flavor forward**  
Figure 8: Flavor interest, January 2020

### THE IMPACT OF COVID-19 ON ICE CREAM AND FROZEN NOVELTIES

- **What you need to know**  
Figure 9: Short, medium and long term impact of COVID-19 on ice cream and frozen novelties, April 2020
- **Opportunities and Threats**
- **COVID-19 boost will have seasonal staying power, but then return to business as usual**
- **Experience, nostalgia will inherently benefit the ice cream and frozen novelties brands**

### What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

### Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

### Buy this report now

Visit [store.mintel.com](https://store.mintel.com)

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

- **A return to wellbeing**
- **Impact on the Ice Cream and Frozen Novelties market**
- **2020 will bring highs, followed by lows**  
Figure 11: Total US retail sales and forecast of ice cream and frozen novelties, at current prices, 2014-24
- **How the crisis will affect ice cream and frozen novelty key consumer segments**
- **Parents and kids are an important part of the ice cream equation...**
- **...yet the number of households with children shrinking**  
Figure 12: Households, by presence of related children, 2008-18
- **Now is a great time to focus on adults as individuals, too**  
Figure 13: Population aged 18 or older, by age, 2014-24
- **How a COVID-19 recession will reshape the Ice Cream and Frozen Novelty industry**
- **Unemployment will shift, not disrupt, discretionary spend for some**
- **COVID-19: US context**

## THE MARKET – WHAT YOU NEED TO KNOW

- **Growth lags behind other treats**
- **Frozen novelties to take the largest share of market**
- **Restaurants scream for ice cream**
- **Frozen treats part of a balanced diet?**

## MARKET SIZE AND FORECAST

- **Stagnation persists in the long-term**  
Figure 14: Total US retail sales and forecast of ice cream and frozen novelties, at current prices, 2014-24

## MARKET BREAKDOWN

- **Frozen novelties drive category growth**  
Figure 15: Total US retail sales and forecast of ice cream and frozen novelties, by segment, at current prices, 2014-24

## MARKET PERSPECTIVE

- **Snack boom gives consumers options for indulgence**  
Figure 16: New food US product launches by subcategory, % change 2018-2019
- **Parents are worried about sugar**  
Figure 17: Getting parents to consider new food or drinks, November 2019

## What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

## Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

## Buy this report now

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100

## MARKET FACTORS

- **Consumers looking for balance**  
Figure 18: Attitudes toward healthy eating, September 2019
- **Shrinking households with children not likely to rebound soon**  
Figure 19: Households, by presence of related children, 2008-18

## KEY PLAYERS – WHAT YOU NEED TO KNOW

- **Wells Enterprises given the cold shoulder by Halo Top declines**
- **Fun and function**
- **Diet ice cream results in thin sales**
- **Milk. Cream. Sugar. Eggs.**

## COMPANY AND BRAND SALES OF ICE CREAM AND FROZEN NOVELTIES

- **Halo Top chills Wells Enterprises' sales while other players hold steady**  
Figure 20: Multi-outlet sales of ice cream and frozen novelties, by leading companies, rolling 52 weeks 2019 and 2020
- **Novelty boom could lead to an oversaturation issue**  
Figure 21: Multi-outlet sales of frozen novelties, by leading companies and brands, rolling 52 weeks 2019 and 2020

## WHAT'S WORKING

- **Unique flavors**  
Figure 22: MULO sales of ice cream brands with unique flavors, rolling 52 weeks 2019
- **Function brings balance to indulgence**  
Figure 23: MULO sales of ice cream brands with functional benefits, rolling 52 weeks 2019
- **Mini sizes lead to big sales**  
Figure 24: MULO sales of ice cream brands with mini products, rolling 52 weeks 2019

## WHAT'S STRUGGLING

- **The dairy-free segment is getting crowded...**  
Figure 25: MULO sales of non-dairy ice cream brands, rolling 52 weeks 2019
- **...but there's opportunity in nice cream**  
Figure 26: MULO sales of ice cream made from fruit, rolling 52 weeks 2019

## What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

## Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

## Buy this report now

Visit [store.mintel.com](https://store.mintel.com)

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

# Ice Cream and Frozen Novelties: Incl Impact of COVID-19 - US - April 2020



Report Price: £3695 | \$4995 | €4400

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

- **Diet ice creams face a rocky road**

Figure 27: MULO sales of low fat/low calorie brands and sorbet/sherbet brands, rolling 52 weeks 2019

- **Packaged gelato struggles to find its niche**

Figure 28: MULO sales of gelato brands, rolling 52 weeks 2019

## WHAT TO WATCH

- **Back to basics**

Figure 29: ice cream brands with real positioning

- **Plant based gives way to lab made**

Figure 30: Perfect Day ice cream

- **Ice cream gets sustainable, ethical**

Figure 31: Ethical ice cream brands

## THE CONSUMER – WHAT YOU NEED TO KNOW

- **Parents lead engagement, especially in frozen novelties**
- **Simple is best**
- **It's all about flavor**

## TYPES OF ICE CREAM AND FROZEN NOVELTIES CONSUMED

- **Consumers still sweet on ice cream...**

Figure 32: Ice cream and frozen novelties consumption, net, January 2020

- **...yet regular engagement could use a boost**

Figure 33: Ice cream and frozen novelties consumption, repertoire, January 2020

- **Older consumers are ice cream traditionalists**

Figure 34: Ice cream and frozen novelties consumption, by age, January 2020

- **Frozen novelty consumption driven by children**

Figure 35: Ice cream and frozen novelties consumption, by parental status, January 2020

- **Novelties, sherbet, ices, sorbets can afford to get experimental**

Figure 36: Ice cream and frozen novelties consumption, net, by food and drink segmentation, January 2020

## HOUSEHOLD ICE CREAM AND FROZEN NOVELTIES CONSUMPTION

- **Children an important part of the ice cream equation**

Figure 37: Household ice cream and frozen novelties consumption, January 2020

## What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

## Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

## Buy this report now

Visit [store.mintel.com](https://store.mintel.com)

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

Figure 38: Household ice cream and frozen novelties consumption, repertoire, by parental status, January 2020

- **Consumers age out of icy treats, novelties**

Figure 39: Types of ice cream and frozen novelties consumed, by parental status and age of children, January 2020

## IMPORTANT ICE CREAM AND FROZEN NOVELTIES ATTRIBUTES

- **Flavor comes first**

Figure 40: Ice cream and frozen novelties attributes, January 2020

Figure 41: Ice cream and frozen novelties claims, % change 2018-2019

- **Indulgent varieties don't need BFY positioning**

Figure 42: Ice cream and frozen novelties attributes by types consumed, January 2020

- **Dairy-free category is serving a small percentage of consumers**

Figure 43: Ice cream and frozen novelties attributes, dairy free, by age, January 2020

## ICE CREAM AND FROZEN NOVELTIES ATTITUDES

- **Health isn't an expectation, indulgence is**

Figure 44: Ice cream and frozen novelties attitudes, January 2020

- **Men more willing to compromise on indulgence**

Figure 45: Ice cream and frozen novelties attitudes, by gender and age, January 2020

- **Parents of kids 6-11 most concerned with healthy options**

Figure 46: Ice cream and frozen novelties attitudes, by children in household, January 2020

## ICE CREAM AND FROZEN NOVELTIES ASSOCIATIONS

- **Frozen treats have distinct strengths and weaknesses**

Figure 47: Correspondence Analysis – Symmetrical map – Frozen treat associations, January 2020

Figure 48: Ice cream and frozen novelty associations, January 2020

- **Guilt is gendered**

Figure 49: Ice cream and frozen novelty associations, January 2020

## FLAVOR INTEREST IN ICE CREAM AND FROZEN NOVELTIES

- **The more flavor, the better**

Figure 50: Flavor interest, January 2020

## What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

## Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

## Buy this report now

Visit [store.mintel.com](https://store.mintel.com)

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

# Ice Cream and Frozen Novelties: Incl Impact of COVID-19 - US - April 2020



Report Price: £3695 | \$4995 | €4400

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

- **Older consumers less adventurous**

Figure 51: Flavor interest, by age, January 2020

- **Women hungrier for flavors**

Figure 52: Flavor interest, by age and gender, January 2020

## INNOVATION TO DRIVE TRIAL

- **Consumers motivated by indulgence, especially a permissible or functional one**

Figure 53: Innovation to drive trial, January 2020

- **Motivations vary by age**

Figure 54: Innovation to drive trial, by age, January 2020

- **Parents seeking out BFY options**

Figure 55: Innovation to drive trial, January 2020

## APPENDIX – DATA SOURCES AND ABBREVIATIONS

- **Data sources**
- **Sales data**
- **Fan chart forecast**
- **Consumer survey data**
- **Further Analysis Methodology**
- **Correspondence Analysis**
- **TURF**
- **Abbreviations and terms**
- **Abbreviations**

## APPENDIX – THE MARKET

Figure 56: Total US retail sales and forecast of ice cream and frozen novelties, at inflation-adjusted prices, 2014-24

Figure 57: Total US retail sales of ice cream and frozen novelties, by segment, at current prices, 2017 and 2019

Figure 58: Total US retail sales and forecast of frozen novelties, at current prices, 2014-24

Figure 59: Total US retail sales and forecast of frozen novelties, at inflation-adjusted prices, 2014-24

Figure 60: Total US retail sales and forecast of frozen novelties, by type, at current prices, 2014-19

Figure 61: Total US retail sales and forecast of ice cream, at current prices, 2014-24

Figure 62: Total US retail sales and forecast of ice cream, at inflation-adjusted prices, 2014-24

Figure 63: Total retail sales of ice cream and frozen dairy desserts, by type, at current prices, 2014-19

Figure 64: Total US retail sales and forecast of frozen yogurt/ non-dairy, at current prices, 2014-24

## What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

## Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

## Buy this report now

Visit [store.mintel.com](https://store.mintel.com)

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

Figure 65: Total US retail sales and forecast of frozen yogurt/  
non-dairy, at inflation-adjusted prices, 2014-24

Figure 66: Total US retail sales and forecast of sherbet/  
sorbet/ices, at current prices, 2014-24

Figure 67: Total US retail sales and forecast of sherbet/  
sorbet/ices, at inflation-adjusted prices, 2014-24

## APPENDIX – RETAIL CHANNELS

Figure 68: Total US retail sales of ice cream and frozen  
novelties, by channel, at current prices, 2014-19

Figure 69: Total US retail sales of ice cream and frozen  
novelties, by channel, at current prices, 2017 and 2019

Figure 70: US supermarket sales of ice cream and frozen  
novelties, at current prices, 2014-19

Figure 71: US drugstore sales of ice cream and frozen  
novelties, at current prices, 2014-19

Figure 72: US sales of ice cream and frozen novelties through  
other retail channels, at current prices, 2014-19

## APPENDIX – KEY PLAYERS

Figure 73: Multi-outlet sales of ice cream, by leading  
companies and brands, rolling 52 weeks 2019 and 2020

Figure 74: Multi-outlet sales of frozen yogurt/non-dairy, by  
leading companies and brands, rolling 52 weeks 2019 and  
2020

Figure 75: Multi-outlet sales of sherbet/sorbet/ices, by  
leading companies and brands, rolling 52 weeks 2019 and  
2020

## What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

## Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

## Buy this report now

Visit [store.mintel.com](https://store.mintel.com)

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100





## About Mintel

Mintel is the **expert in what consumers want and why**. As the world's leading market intelligence agency, our analysis of consumers, markets, product innovation and competitive landscapes provides a unique perspective on global and local economies. Since 1972, our predictive analytics and expert recommendations have enabled our clients to make better business decisions faster

Our purpose is to help businesses and people grow. To find out how we do that, visit **[mintel.com](https://www.mintel.com)**.