

# Ice Cream and Frozen Novelties - US - 2023

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## This report looks at the following areas:

- Types of frozen treats purchased
- Frozen treat purchase location
- Frozen treat attributes of interest
- Frozen treat flavors of interest
- Frozen treat occasions
- Attitudes toward mix-ins and toppings

Frozen treat purchase remains nearly universal, with 94% of US adults buying products in the category in the past six months. The category's ability to retain this audience amid times of rising food costs and increasingly strict eating habits speaks to the power of enjoyment. Flavor and size outweigh price as a frozen treat choice factor. Category players must adeptly navigate this enjoyment benefit and avoid going too far into pure indulgence or treat positioning, which can narrow relevance and limit consumption occasions.

While ice cream dominates purchase, frozen novelties surpassed ice cream market share in 2021 and continues as the largest segment in 2022, controlling 50% of category sales. Novelties, which include ice cream sandwiches, bars, cones and sundaes benefit from being seen as good for eating while alone, which opens the segment up to a larger share of consumption occasions. Further, their pre-portioned nature allows for a sense of responsible consumption control. The segment is also a strong playground for flavor and format innovation, which can drive purchase in service of exploration.

Mix-ins have been an area of innovation in the category over the past several years, and while they garner interest, consumer response points to enjoyment in personal customization. Keeping pure (mix-in free) options available will limit alienation, and marketing efforts that guide customization can empower shoppers through experimentation.



“Frozen treats enjoy a place of importance in the eyes of US consumers. Even amid price hikes and sugar concerns, 94% of shoppers purchase products in the category, speaking to the power of enjoyment. Brands must capitalize on the value of enjoyment but avoid going too far into treat or indulgence positioning, which can limit relevant occasions.”

– Michele Scott, Associate Director

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Dairy-based products continue to dominate interest. Lactose-free frozen treat purchase behavior suggests an opportunity for the category. 34% of adults 18-24 claim to have purchased lactose-free options.



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