Ice Cream and Frozen Novelties - US - 2023

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:

- **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.

What's included

- Executive Summary
- Full Report PDF
- Infographic Overview
- Powerpoint Presentation
- Interactive Databook
- Previous editions

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Table of Contents

OVERVIEW

EXECUTIVE SUMMARY

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KEY PLAYERS

COMPETITIVE STRATEGIES AND MARKET OPPORTUNITIES

Figure 39: Frozen treat launches ranked by the attribute "good value," 2023*

- **Chocolate+ drives perceptions of good taste**

Figure 40: Frozen treat launches ranked by the attribute "tasty," 2023*

Figure 41: Frozen treat launches, by leading flavors (inc. blends), 2023*

- **Fastest growing claims carry more luster than current leaders'**

Figure 42: Frozen treat launches, by leading claims, 2021-23*

Figure 43: Frozen treat launches, by fastest growing claims, 2021-23*

THE ICE CREAM AND FROZEN NOVELTIES CONSUMER – FAST FACTS

- **Frozen treat consumption is nearly universal**
- **Dairy-based offerings garner the lion's share of interest**
- **Ice cream shoppers increasingly rely on retail**
- **Amid cost-saving efforts, flavor and size outweigh price in product choice**
- **There's a social aspect to ice cream, novelties are more of a solo endeavor**
- **While mix-ins are enjoyed, consumers like to add their own**

FROZEN TREAT PURCHASE

- **Any purchase**
- **94% of US adults purchase frozen treats**

Figure 44: Frozen treat purchase location – Net – Any frozen treat purchase*, 2023

- **Frozen treat format**
- **Ice cream continues to lead purchase, followed by frozen novelties**

Figure 45: Frozen treat purchase, 2023

Figure 46: Frozen treat purchase, 2022-23

- **Sherbet/sorbet appeals to older shoppers, women**

Figure 47: Frozen treat purchase, by gender and age, 2023

- **Financial hardship leads to reliance on the basics**

Figure 48: Frozen treat purchase, by financial situation, 2023

- **Frozen novelties have a strong audience in natural sweeteners seekers**

Figure 49: Frozen treat purchase, by sugar segmentation, 2023

- **Dairy/non-dairy/lactose free**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

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- **Dairy continues to dominate interest, non-dairy introduces variety**
  Figure 50: Frozen treat purchase – Dairy/non-dairy/lactose-free, 2023
- **Younger shoppers gravitate toward lactose-free, newer brands meet them there**
  Figure 51: Frozen treat launches featuring a low/no/reduced lactose claim, 2022-23
  Figure 52: Frozen treat purchase – Dairy/non-dairy/lactose-free, by gender and age, 2023
- **Moms are big fans of popsicles/fruit bars**
  Figure 53: Frozen treat purchase – Dairy/non-dairy/lactose-free, by parental status, 2023
- **Natural sugar seekers overindex in purchase of dairy-/lactose-free ice cream**
  Figure 54: Frozen treat purchase – Dairy/non-dairy/lactose-free, by sugar segmentation, 2023

FROZEN TREAT PURCHASE LOCATION

- **Retail frozen treat purchase on the rise**
  Figure 55: Frozen treat purchase location, 2023
  Figure 56: Frozen treat purchase location, 2022-23
- **Young men are strongest target for foodservice frozen treats**
  Figure 57: Frozen treat purchase location, by gender and age, 2023

FROZEN TREAT ATTRIBUTES OF INTEREST

- **Flavor leads frozen treat choice, size outweighs price**
  Figure 58: Frozen treat attributes of interest, 2023
- **Enjoyment is a stronger sell than indulgence**
  Figure 59: Frozen treat statements – Indulgence, 2023
- **Use sales to appeal to women**
  Figure 60: Frozen treat attributes of interest, by gender and age, 2023
- **Women want to feel their investment is worth it**
  Figure 61: Frozen treat statements - Indulgence, by gender and age, 2023
- **Nutritional value and environment influence natural sugar seekers**
  Figure 62: Frozen treat attributes of interest, by sugar segmentation, 2023
- **Flavor rules, but price has outsized impact among financially struggling**

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Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

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