



# ICE CREAM

## 2018 - TREND INSIGHT REPORT

When it comes to ice cream, consumers have the power – giving ice cream makers the opportunity. Ice cream is nearly universal (with a 94% purchase rate) and consumers are fully empowered to demand it all: Healthy yet indulgent. Loyal yet adventurous.

Traditional yet exciting. What may seem like contradictions come with clear themes. One piece of clarity: the product developers that win will be the ones that refuse to “stay in their own lane.”

# FLAVORS

TRIED & TRUE

More than a quarter of new launches 2013-2017 were either chocolate or vanilla, indicating that core flavors still reign. Interestingly, if "salted caramel" and "sea salt caramel" varieties are combined, the taste becomes the third most popular flavor, displacing strawberry.

## A CLOSER LOOK AT VANILLA

Usage of the flavor grew by 38% 2016-2017 despite record high prices and an upheaval in the bourbon vanilla market. Some ice cream producers are calling out the country of origin as a way to elevate the traditional taste. **Some examples:**

- Naja Madagascar Vanilla Gelato
- Three Twins Ice Cream Wafer Madagascar Vanilla
- Culinary Tours Tahitian Vanilla Bean Gelato
- Haagen-Dazs Trio Ice Cream with Belgian Chocolate

## NEW & DIFFERENT

New flavors continue to be influenced by cake, pie, tart, tea, coffee and espresso. Fun and fruity flavors captured attention at this year's annual Innovative Ice Cream Flavor Competition, sponsored by the International Dairy Foods Association. Winners included Signature Reserve Brazilian Guava Cheesecake Ice Cream, a sweet-and-sour, super-premium cheesecake ice cream balanced with ribbons of tart guava puree and bits of cheesecake crust pieces, from Albertsons Co.; and Pomegranate Sweet Potato Medley Bar, made with real fruit and vegetable juice, from Perry's Ice Cream Co.



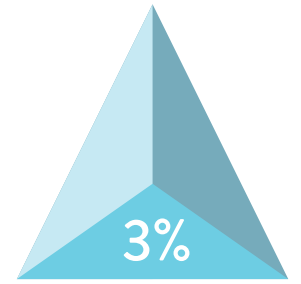
94% CONSUMERS SAY THEY PURCHASE ICE CREAM & FROZEN NOVELTIES



EXPECTED INCREASE IN DOLLAR SALES 2017-22



TOP PURCHASERS  
THOSE AGED 18-44 & PARENTS



MODEST DOLLAR GROWTH  
2016-2017

## MOST DARING / CREATIVE FLAVORS IN ICE CREAM COMPANY LINES

1. Sweet and Salty
2. Dreamsicle Orange
3. Lavender Coconut
4. Salted Caramel Chocolate Truffle
5. Fireball / Red Hot Cinnamon
6. Elvis / Banana Peanut Butter
7. Caramel Apple
8. Black Raspberry

SOURCE: DAIRY FOODS / IFDA

# HEALTHY-ISH

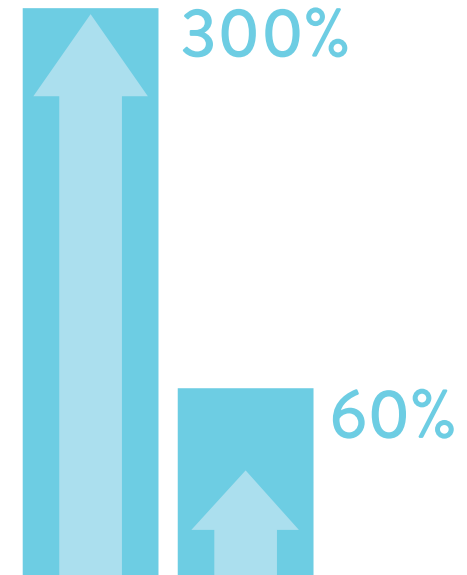
Consumers want healthy. They want indulgence. And they feel fully empowered to demand both. Ice cream with a “healthy halo” is finding a clear path to growth. Consider that for many consumers, health equates with nutrition. Health, for many consumers, goes hand in hand with “free-from” claims or clean label ingredients and a perception of “naturalness.” Let’s take a look at products giving consumers permission to indulge.

In the past, ice cream companies created no-sugar-added and low-fat formulations, but healthy and guilt-free frozen treats struggle to deliver on taste and indulgence. Ice cream makers are now adding ingredients like protein in response to consumer demand.



## FUNCTIONAL CLAIMS ARE GROWING

In 2016-2017, high/added fiber grew 300% and high/added protein grew 60%



I THINK THAT CONSUMERS ARE BECOMING MORE EDUCATED ABOUT WHAT IT MEANS TO EAT HEALTHY AND THE EFFECTS OF THINGS LIKE CALORIES, SUGAR AND PROTEIN. THE CHALLENGE IS THAT MOST CONSUMERS DO NOT WANT TO SACRIFICE ON TASTE.

- Doug Bouton, President and COO of Halo Top Creamery



# REGRET-FREE ICE CREAM

Halo Top has overtaken market share by proving that consumers can have it all – taste, indulgence and health. “Healthy indulgence” Halo Top had the best-selling ice cream pints last summer, grabbing 6 percent market share with a nearly 700 percent sales change in a year. The low-calorie ice cream adds protein sweetened with a blend of erythritol, organic cane sugar and organic stevia leaf extract.

Better-for-you products aren’t a new idea in the ice cream category, but Halo Top changed the way consumers may look at indulgent products. With calorie counts ranging from 280 to 360 calories for the whole pint, Halo Top gives consumers permission and a guilt-free pass to finish the container.

Halo-Top isn’t the only “healthy-ish” game in Ice Cream town. DailyBurn.com lists these ice creams as “healthy”:

- **Enlightened** ice creams feature skim milk, milk protein isolate and monk fruit extract. They come in pints and bars and feature flavors like birthday cake, bananas foster, frozen hot chocolate and strawberry cheesecake
- **So Delicious** are vegan-friendly and come in dairy-free bases like coconut, soy, almond and cashew milks. Flavors include Cherry Amaretto, Chocolate Brownie Almond, Green Tea and Pomegranate Chip.
- **Julie’s Organic Ice Cream** are non-GMO, organic and interesting taste profiles. (Blackberries & Cream includes blackberries, egg yolks and lemon juice.)

## PRO & CON: REAL CONSUMERS WEIGH IN Consumers give their perception of Halo Top ice cream

“

LIGHT ICE CREAM IS NOT WORTH EATING.  
EAT THE REAL STUFF OR NO ICE CREAM.

- MALE, NORTHEAST, 55+

LOOKS YUMMY! I LOVE CARAMEL AND  
THE FAT CONTENT IS GREAT. I’D BUY THIS.

- FEMALE, WEST, 55+

”





KIDS AGES 6-11  
WHO EAT ICE CREAM



TEENS  
WHO EAT ICE CREAM

## KIDS & TEENS AS A CONSUMER GROUP

Kids are avid ice cream fans – 94% of kids ages 6-11 eat ice cream (88% of teens) – and influence their parents’ purchases. And parents who often use indulgences as a reward or bribe are a strong target for ice cream.

Innovation and international flair are gaining appeal among kids and teens because they don’t share ice cream’s nostalgic backstory with their parents. Kids prefer toppings

but teens experiment with more complex formats like multiple flavors or indulgent mix-ins.

Younger adults are often experimental with their foods, flavor combinations and dessert-inspirations. Brands with indulgent yet unique hybrid options, with complementary or contrasting flavors or textures, stand out.



### PRODUCTS OF NOTE:

Breyers 2in1, HyVee Til the Cows Come Home, Dreyer’s Sour Patch Kids Ice Cream



A product like **Breyers 2in1s** may satisfy multiple cravings with Oreos and Chips Ahoy! cookies, Reese’s and Reese’s Pieces candy, Snickers and M&M’s candy and Heath and waffle cone.

Midwestern grocer **Hy-Vee Inc.’s brand Til the Cows Come Home** features cleverly named ice cream flavors like Dough-Mo Arigato Mr. Roboto, A Kick In the Peanut Butter, No Fudgin’ Way, Play That Chunky Music White Cow and Say Cheese, Cheesecake.

And this summer, Walmart offers the exclusive Dreyer’s Sour Patch Kids Ice Cream.



# THE TAKEAWAYS

*Universally beloved, ice cream gets a lot of attention. Consumers know exactly what they want, and the lines in the category have become blurred. No longer are indulgence and health mutually exclusive. Consumers know that they can have both – which gives product developers a mandate: bring the taste, and bring the fun. But regardless of where your product development lands, taste performance matters. It is far and away the most important drive for consumers. Prioritize taste and provide a “wow” factor and your ice cream is sure to dazzle.*

## YOU DESERVE MORE. LET'S GET STARTED.

What does true partnership look like? You deserve a flavor partner ready to turn these trends into the tangible.

Let FONA's market insight and research experts get to work for you. Translate these trends into bold new ideas for your brand. Increase market share and get to your “what's next.” Our technical flavor and product development experts are also at your service to help meet the labeling and flavor profile needs for your products to capitalize on this consumer trend. Let's mesh the complexities of flavor with your brand development, technical requirements and regulatory needs to deliver a complete taste solution.

From concept to manufacturing, we're here for you – every step of the way. Contact our sales service department at 630.578.8600 to request a flavor sample or chat us up at [www.fona.com/contact-fona](http://www.fona.com/contact-fona).

## SOURCES

- *Mintel Reports*
- *Cision / PR Newswire*
- *Dairy Foods*
- *DairyReporter.com / Food Navigator-USA*
- *Hy-Vee Inc.*
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- *International Dairy Foods Association*
- *DailyBurn.com*



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