

Report Price: £1750.00 | \$2834.04 | €2223.04

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



"There is no shortage of innovation in the ice cream and desserts market. There is nonetheless plenty of scope to take NPD in new directions to inject even more excitement into the category and grab the attention of experimental "foodie" consumers keen to step outside their comfort

zone."

- Emma Clifford, Senior Food Analyst

This report looks at the following areas:

- Encouraging customisation can help to heighten consumers' engagement with desserts and ice cream
- · Functionality can be further explored in the ice cream market
- There is no need to play it safe with NPD, with a more unconventional approach likely to reap rewards

Volume sales of ice cream and desserts are in long-term decline, suggesting that these products are being eaten less often. While health concerns are nothing new, the ongoing sugar debate which started in 2014 and put this issue firmly on people's radars has put these products under more intense pressure.

It is not all doom and gloom, however, with some brands in the ice cream market including Magnum and Ben & Jerry's posting strong performances.

BUY THIS REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533

> Brazil 0800 095 9094

Americas +1 (312) 943 5250

+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: £1750.00 | \$2834.04 | €2223.04

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

Table of Contents

Introduction

Definition

Ice cream

Desserts

Abbreviations

Executive Summary

The market

Ice cream

Figure 1: Forecast of UK retail sales of ice cream, sorbet and frozen yogurt, by value, 2010-20

Desserts

Figure 2: Forecast of UK retail sales of desserts, by value, 2010-20

Market factors

The sugar debate puts pressure on manufacturers

A big summer boost for ice cream in 2013

The ageing population presents a challenge

Companies, brands and innovation

Unilever has a stronghold on the ice cream market

Figure 3: Leading manufacturers' shares in the UK retail ice cream market, by value, 2014/15*

NPD activity is dominated by chilled desserts and dairy ice cream

Adspend reaches a five-year high

The consumer

Eight in 10 people eat ice cream

Figure 4: Types of ice cream/sorbet/frozen yogurt eaten in the past 12 months, April 2015

Ice cream is most commonly eaten as a treat and weather plays a strong role

Figure 5: Occasions for eating ice cream, April 2015

Three quarters of adults eat shop-bought desserts

Figure 6: Usage and purchasing of desserts, April 2015

Ingredients and flavours can add more excitement to ice cream and desserts

Figure 7: Interest in innovation in ice cream and desserts, April 2015

Frozen yogurt from yogurt brands attracts interest

Figure 8: Attitudes towards ice cream, April 2015

Opportunities for "hybrid" desserts

Figure 9: Attitudes towards desserts, April 2015

What we think

Issues and Insights

Encouraging customisation can help to heighten consumers' engagement with desserts and ice cream

BUY THIS REPORT NOW VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

EMAIL: reports@mintel.com



Report Price: £1750.00 | \$2834.04 | €2223.04

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

The facts

The implications

Functionality can be further explored in the ice cream market

The facts

The implications

There is no need to play it safe with NPD, with a more unconventional approach likely to reap rewards

The facts

The implications

Market Drivers

Key points

The sugar debate puts pressure on manufacturers...

...but also creates opportunities for low-sugar variants

A big summer boost for ice cream in 2013

The ageing population presents a challenge

Rise in consumer spending paving the way for premiumisation

Strengths and Weaknesses

Strengths

Weaknesses

Who's Innovating?

Key points

NPD activity is dominated by chilled desserts and dairy ice cream

Figure 10: New product launches in ice cream and desserts, by segment, 2011-15

Ambient desserts grow their share of NPD

Dairy-free desserts double their share of NPD within ice cream and desserts

Brands snatch the lead from own-label in NPD

Figure 11: New product launches in ice cream and desserts, by company (top 10), 2011-15

The 'Greek' trend gathers momentum

The edgy Licktators brand targets adults

A rise in better-for-you claims in 2014

Figure 12: New product launches in ice cream and desserts, by selected claim, 2011-15

Innovation in Gelato

Market Size and Forecast

Key points

Volume sales continue to slip in 2015

Figure 13: UK retail value and volume sales of ice cream, sorbet and frozen yogurt, 2010-20

Forecast - Ice cream, sorbet and frozen yogurt

Figure 14: Forecast of UK retail sales of ice cream, sorbet and frozen yogurt, by value, 2010-20

Desserts



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.con



Report Price: £1750.00 | \$2834.04 | €2223.04

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

Figure 15: UK retail value and volume sales of desserts, 2010-20

Forecast - Desserts

Figure 16: Forecast of UK retail sales of desserts, by value, 2010-20

Methodology

Segment Performance

Key points

Ice cream sales reached a peak in 2013

Figure 17: UK retail value and volume sales of ice cream, sorbet and frozen yogurt, by segment, 2012-15

Tubs are the most popular format of ice cream

Figure 18: UK retail value and volume sales of ice cream, by format, 2012-15

Chilled formats lead desserts in value

Figure 19: UK retail value and volume sales of ambient, chilled and frozen desserts, 2010-15

Market Share

Key points

Unilever had a stronghold on the ice cream market

Figure 20: Leading brands' sales and shares in the UK retail ice cream market (top 10), by value and volume, 2013/14-2014/15

Figure 21: Leading manufacturers' sales and shares in the UK retail ice cream market (top 10), by value and volume, 2013/14-2014/15

Own-label extends its lead in chilled desserts

Figure 22: UK retail sales of leading brands in chilled dessert, by value and volume, 2013/14-2014/15

Frozen desserts

Figure 23: Leading brands' sales and shares in the UK retail frozen desserts market, by value and volume, 2013/14-2014/15

Ambient desserts

Figure 24: Leading brands' sales and shares in the UK retail ambient desserts market, by value and volume, 2013/14-2014/15

Figure 25: Leading manufacturers' sales and shares in the UK retail ambient desserts market, by value and volume, 2013/14-2014/15

Companies and Products

General Mills (Häagen-Dazs)

Product range

Recent activity

Mars

Product range and innovation

Recent activity

Müller UK & Ireland

Product range and innovation

Recent activity

Nestlé

Product range

Product innovation

Recent activity



VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

MAIL: reports@mintel.com



Report Price: £1750.00 | \$2834.04 | €2223.04

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

R&R

Product range

Recent activity

Premier Foods

Product range and innovation

Recent activity

Unilever

Product range

Innovation

Recent activity

Brand Communication and Promotion

Key points

Adspend reaches a five-year high

Figure 26: Recorded above-the-line, online display and direct mail total advertising expenditure in the UK ice cream and desserts market, 2010-15

Unilever leads adspend

Figure 27: Recorded above-the-line, online display and direct mail total advertising expenditure in the UK ice cream and desserts market, by top 10 advertisers in 2014, 2010-15

Unilever steps up adspend in 2014

Iceland leads the supermarkets

Coverage/methodology

Brand Research – Ice Cream and Desserts

Key points

Brand map

Figure 28: Attitudes towards and usage of selected brands, April 2015

Key brand metrics

Figure 29: Key metrics for selected brands, April 2015

Brand attitudes: Ambrosia most strongly noted for offering value

Figure 30: Attitudes, by brand, April 2015

Brand personality: Gü has an element of exclusivity compared to other brands

Figure 31: Brand personality – Macro image, April 2015

Müller Rice has healthier brand image but struggles to match up on taste

Figure 32: Brand personality – Micro image, April 2015

Brand analysis

Magnum enjoys strong position built on trust and satisfaction

Figure 33: User profile of Magnum, April 2015

Ben & Jerry's vibrant and fun image provides youthful appeal

Figure 34: User profile of Ben & Jerry's, April 2015

$\label{thm:local_problem} \mbox{\sc H\"{a}agen-Dazs} \ \mbox{\sc may} \ \mbox{\sc be} \ \mbox{\sc the choice} \ \mbox{\sc for consumers} \ \mbox{\sc looking} \ \mbox{\sc for something} \ \mbox{\sc special}$

Figure 35: User profile of Häagen-Dazs, April 2015

Gü is the most exclusive brand analysed, which may limit usage somewhat

BUY THIS REPORT NOW VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

EMAIL: reports@mintel.cor



Report Price: £1750.00 | \$2834.04 | €2223.04

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

Figure 36: User profile of Gü, April 2015

Kelly's has a traditional brand image that appeals to older groups in particular

Figure 37: User profile of Kelly's, April 2015

Ambrosia's longevity boosts trust but it lacks some glamour of other brands

Figure 38: User profile of Ambrosia, April 2015

Müller Rice has an additional element of healthiness, but lacks vibrancy

Figure 39: User profile of Müller Rice, April 2015

The Consumer – Usage of Ice Cream

Key points

Eight in 10 people eat ice cream

Figure 40: Types of ice cream/sorbet/frozen yogurt eaten in the past 12 months, April 2015

Frequency of usage is low

Figure 41: Frequency of usage of handheld ice cream and tubs/pots of ice cream, April 2015

25-34s and parents are core demographics

Figure 42: Consumers who eat handheld ice cream and tubs/pots of ice cream at least once a week, by gender, age and parental status, April 2015

The Consumer – Ice Cream Usage Occasions

Ice cream is most commonly eaten as a treat and weather plays a strong role

Figure 43: Occasions for eating ice cream, April 2015

Dessert occasion fuels usage among older consumers

Figure 44: Selected usage occasions for typically eating ice cream, by age, April 2015

Low levels of usage as a snack

Minority of parents eat ice cream with their children

The Consumer – Usage of Desserts

Key points

Three quarters of adults eat shop-bought desserts

Figure 45: Usage and purchasing of desserts, April 2015

Users eating desserts weekly are in the minority

Figure 46: Frequency of usage of desserts, April 2014

Ingredients and the Consumer - Interest in Innovation in Ice Cream and Desserts

flavours can add more excitement to ice cream and desserts

Figure 47: Interest in innovation in ice cream and desserts, April 2015

Savoury flavours

Textures

Natural sweeteners attract interest

Added health opportunities

Energy-boosting credentials appeal to the younger generation

The Consumer – Attitudes towards Ice Cream

Key points

BUY THIS REPORT NOW VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

EMAIL: reports@mintel.com



Report Price: £1750.00 | \$2834.04 | €2223.04

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

Frozen yogurt from yogurt brands attracts interest

Figure 48: Attitudes towards ice cream, April 2015

Portion control presents an issue

Scope to build on usage occasions

Customisation can be encouraged through NPD

The Consumer – Attitudes towards Desserts

Key points

Opportunities for "hybrid" desserts

Figure 49: Attitudes towards desserts, April 2015

Scope for more ethnic-inspired desserts

Homemade desserts pose competition

Appendix - Market Size and Forecast

Figure 50: Best- and worst-case forecasts for retail sales of ice cream, sorbet and frozen yogurt, by value, 2015-20

Figure 51: Best- and worst-case forecasts for retail sales of ice cream, sorbet and frozen yogurt, by volume, 2015-20

Figure 52: Best- and worst-case forecasts for retail sales of desserts, by value, 2015-20

Figure 53: Best- and worst-case forecasts for retail sales of desserts, by volume, 2015-20

VISIT: store.mintel.com

Americas +1 (312) 943 5250 APAC +61 (0) 2 8284 8100

EMAIL: reports@mintel.com