

Consumer and Market Insights: Ice Cream Market in the US

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July 2015



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Reasons to buy this report

This report brings together consumer analysis and market data to provide actionable insight into the behavior of consumers. This is based on Canadean's unique consumer data – developed from extensive consumption surveys and consumer group tracking – which quantifies the influence of 20 consumption motivations within your industry.

Consumer trends analysis

An overview of the key demographic groups driving consumption in your industry, and what their motivations are for doing so. This enables the reader to identify the most important trends within the market and also determine whether beliefs over what influences consumer behavior within the category are accurate.

Market sizing

Market value and volumes are given over 2008–2018 for 10 leading countries across the globe. Coverage includes major European markets, the US, and the emerging markets of Brazil, Russia, India, and China.

Demographic analysis

Key demographic groups driving consumption within the US market are identified. The figures showcase the number of Dairy occasions attributed to specific age groups and genders, as well as identifying whether these demographic groups "over" consume in the category.

Product innovation examples

Examples are provided of innovative international and country-specific product development within your industry, with analysis of how these products effectively target the most pertinent consumer need states.

Recommended actions

Strategic recommendations of how to capitalize on the evolving consumer landscape are offered, allowing product and marketing strategies to be better aligned with the leading trends in the market.

Future outlook

The report provides insight to highlight the "so what?" implications behind the data, and analysis of how the need states of consumers within your industry will evolve in the short-to-medium term future.

Canadae has identified nine mega-trends that drive consumer choice and these can be broken down into 20 sub-trends



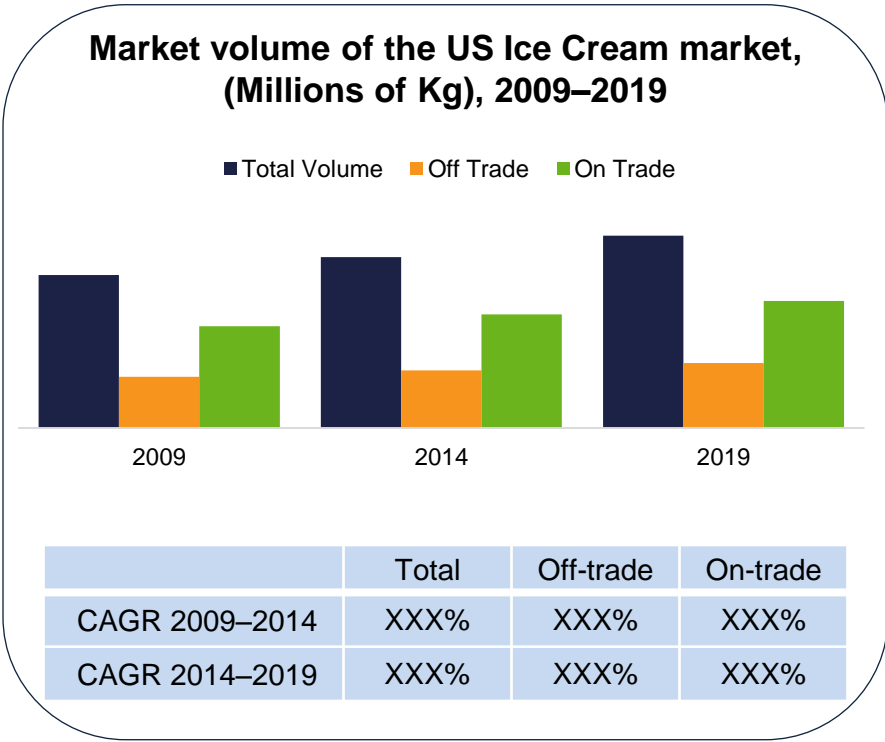
- MEGA-TRENDS:**
- CHANGING LIFESTAGES
 - CONNECTIVITY
 - CONVENIENCE
 - ETHICS
 - EXPERIENCE & ENJOYMENT
 - HEALTH & WELLNESS
 - INDIVIDUALITY
 - TRUST
 - VALUE

The Ice Cream market in the US is forecast to register a marginally higher growth rate both in value and volume terms during 2014–2019 compared to 2009–2014

- The Ice Cream market in the US grew at a CAGR of XX% in US dollar terms during 2009–2014, and is forecast to register growth at a CAGR of XX% during 2014–2019. Off-trade will grow at a marginally higher CAGR of XX% compared to on-trade consumption, which is predicted to grow at a CAGR of XX% during 2014–2019
- Volume consumption of Ice Cream products is forecast to register growth at a CAGR of XX% during 2014–2019, from XXX Kg million in 2014 to XXX Kg million in 2019

Market value of the US Ice Cream market, 2009–2019

	Total(US\$ million)	Off-trade (US\$ million)	On-trade (US\$ million)
2009	XXX	XXX	XXX
2014	XXX	XXX	XXX
2019	XXX	XXX	XXX
CAGR 2009–2014	XXX%	XXX%	XXX%
CAGR 2014–2019	XXX%	XXX%	XXX%

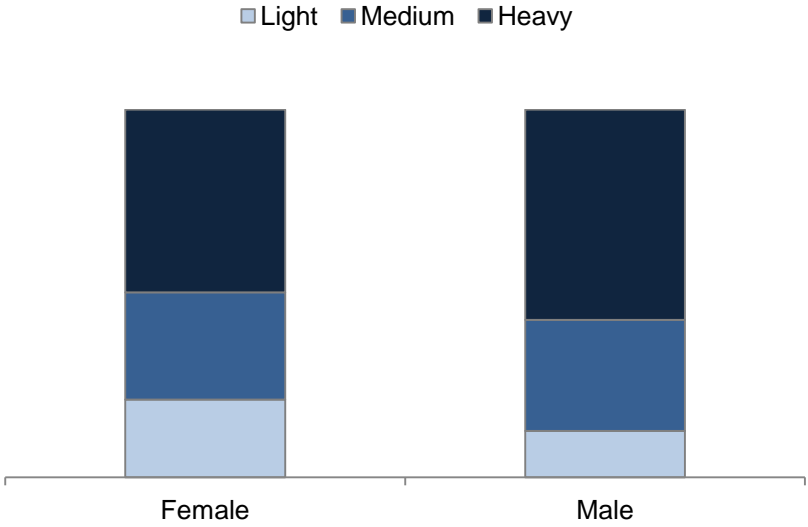


Both US men and women consume Ice Cream at a 'heavy frequency'

Canadean has also broken down Ice Cream consumption in the US by type of consumption:

 Light consumption XX consumption occasions per week	 Medium consumption XX consumption occasions per week	 Heavy consumption XX consumption occasions per week
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Breakdown of consumption by whether it is the result of heavy, medium, or light consumption, by gender, 2014



Men and Women in the US who consume Ice Cream products around 12 times per week, on average, are classified as 'heavy users'. Both men and women in the US are seen to follow 'heavy frequency' consumption; however, men are observed to constitute a higher proportion. Moreover, there is a significant proportion of 'medium frequency' consumption, accounting for XX% for men.

'Heavy user' consumption frequency is valued at XX times per week for Impulse Ice Cream - Single Serve, XX times per week for Artisanal Ice Cream, and XX times per week for the Take-Home and Bulk Ice Cream categories.

The Personal Space & Time trend influences US\$19.9 billion worth of Ice Cream products consumption in the US per annum

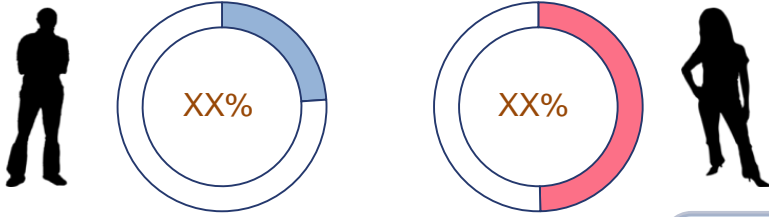
The **Personal Space & Time** trend influences **XXX Kg** million of volume sales in the US

This accounts for **XX%** of all volume consumption within the category

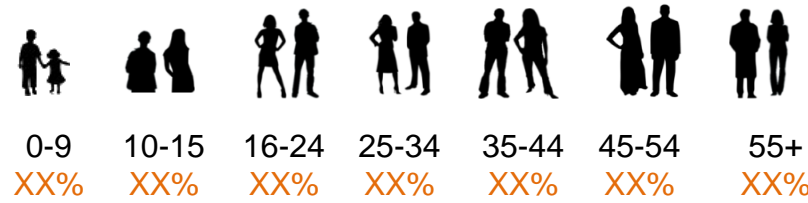
Influence of trend by category:

Artisanal Ice Cream: **XX%** Impulse Ice Cream - Single Serve: **XX%** Take-Home and Bulk Ice Cream: **XX%**

Gender

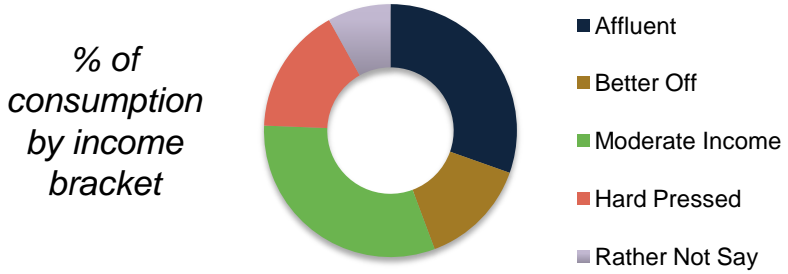


Age group



US\$19.9 billion
2,625.5 Kg million

Income



Leisure time



Consumers are seeking out Ice Cream products that offer moments of escapism and relaxation

Ice Cream is increasingly being consumed for moments of escapism and comfort

Irrespective of macro-economic indicators that suggest the state of the US economy is improving, the environment still encompasses an airy, recessionary feel about it. As a result, these consumers are making more of a conscious effort to take time out to relax and think about themselves. This is causing an increased desire for Ice Cream positioned around comfort eating and “me time”.

These moments of personal space and relaxation become more common as the day progresses. Mid-Lifers in particular often look for temporary breaks during the day to briefly escape work place pressures and also aim for longer, more sustainable moments of relaxation in the evening. Regardless of the time of day that consumers seek this moment of personal space and time, less attention is paid to the micronutrient content of products – including dairy – as indulgence and comfort become a priority as consumers rest and recuperate.

For relaxation at the end of the day, tubs of Ice Cream and single-serve portions are important, as consumers can relax in front of the TV and take their mind off their worries. Almost half of women are seeking products for this reason, making them an important market to target with new, innovative products.

The increased positioning of Ice Cream for rewarding purposes



These Magnum Mini's encourage consumers to take a small break and relax and unwind. Each individually wrapped product allows consumers to relax alone and take a moment of “me time”.

Nostalgic packaging can be used to illicit moments of comfort

This packaging and the name of the brand illicit feelings of comfort and nostalgia, and allow consumers to feel close to the product they are consuming.



What trends will increase in importance over the next 10 years?

Canadean predicts that the following secondary drivers will rise in importance over the next decade to become increasingly influential motivators of consumption within the market.



The hectic combination of professional and family commitments will drive consumption of on-the-go Ice Cream products. **Busy Lives** can often include long commutes and increased working hours, which will lead consumers to look for easy- and quick-to-consume products. Marketers should offer convenient packs that contain utensils and can be easily disposed of. Additionally, for busy parents, family packs that contain different varieties will provide useful treating snacks.



The **Health** trend relates to the idea that consumers will become more aware about the physical impacts of Ice Cream and general wellbeing. They will be inclined to look for products that are “better for you”. In this regard, they will consume those that are made with natural ingredients, sugar-free, low in fat, and are not genetically modified. Therefore, the Ice Cream industry should increasingly offer products such as fat free and lactose free, which help to deal with health problems.



US consumers are becoming more concerned about their individual needs, and it is this desire for **Individualism** that will drive food consumption, including Ice Cream. With consumers taking a more individualistic approach, marketers should promote a range of Ice Cream products that meet individual needs, such as being low in fat or using natural sweeteners. Consumers who closely monitor their nutritional intake will look for products that meet a more specific range of dietary requirements.

This report is comprised of two data research programs

MARKET DATA

- **Method:** Analyst triangulation of consensus numbers based upon comprehensive primary and desk research as part of an international research programme.
- **Coverage:**
 - 50 Countries fully researched
 - Category and segment breakdown
 - Eight channels
 - Value and Volume data
 - Internationally comparable data
 - 100% standardized definitions

CONSUMER DATA

- **Method:** Extensive consumption surveys and consumer group tracking with strict age and gender quotas to ensure nationally-representative results.
- **Coverage:**
 - 10 Countries
 - 20 Consumer Trends
 - 26 Consumer Groups
 - Category breakdown
 - Integrated market sizing at the country and category level
 - Interim 2013 Consumer data generated by mapping 2013 Market size data onto 2012 Consumer data consumption values

Details on the methodology for both of these research programs can be found in the Appendix.



Successful New Product Development Strategies in the Food, Drinks and Personal Care Market

Canadean has studied the best new product development, cross-category innovation, and marketing campaigns in both developing and developed countries to find common themes and best practice. The evolution of consumption habits across the world means both retailers and manufacturers need a renewed understanding of consumers' changing lifestyles, and how this will affect their product choices. The report highlights innovative new product development, and offers strategic recommendations to capitalize on the evolving motivations driving consumption.



Global and Regional Mega-Trends: Understanding Consumer Attitudes and Behaviors in Value

Consumers have since been increasing their search and desire for products positioned around value. The desire for value has been ingrained into the lives of many consumers, who are realizing and reaping the benefits of using certain shopping tactics to gain the best possible deal. This report highlights the skeptical nature of consumers when it comes to big brands and the consequent increased demand for private label products



Consumer and Market Insights: Dairy Market in Italy

The Italian Dairy market value, in US dollar terms increased moderately at a CGAR of 1.3% during 2009–2014 and is expected to decline by 1.0% during 2014–2019 due to exchange rate volatility. The Milk and Cheese categories together constitute around three-fourth of Dairy market value sales in Italy. Those aged 55 and over account for the largest share of the Italian Dairy market, making it crucial to target them with age-appropriate products at affordable prices.