

# Consumer Trends Analysis: Understanding Consumer Trends and Drivers of Behavior in Brazilian Ice Cream Market

## **FD0041IS – Sample Pages**

Insight Report

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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.

# Consumers are indulging in Ice Cream to relax and have fun

There are a number of reasons why consumers turn to **Ice Cream** and a number of reasons they don't. It is crucial for manufacturers to understand what consumers want from the actual products that they purchase

## Indulgence:

Desire to indulge in variety of rich flavours and cooling nature of Ice Cream is driving consumption.

## Personal space:

Consumers seek out time for themselves from their stressful lives and indulge in Ice Cream to relax.

## Fun and enjoyment:

Consumers seek Ice Cream products as fun accompaniments to enjoy leisure time with family and friends.

## Convenience:

Ice Cream products can be consumed on-the-go and as they are conveniently packed and available in most of the retail outlets.

## Low-budget snacking:

Ice Creams are considered by consumers to be a relatively inexpensive way of treating themselves.

## DRIVERS OF CONSUMPTION

## INHIBITORS OF CONSUMPTION

## Health:

Ice Cream products are inherently associated as being unhealthy due to high fat and sugar content.

## Preference for substitutes:

Consumers sometimes favor frozen Dairy products such as Frozen Yogurts over Ice Cream as they see them healthier

## Seasonal good:

Consumers see Ice Cream, with its cold texture, as good to enjoy in warmer weather, limiting consumption in winter.

## Age restricted demand:

Parents of young children, and Older Consumers tend to avoid buying more Ice Cream, opting for nutritional substitutes.

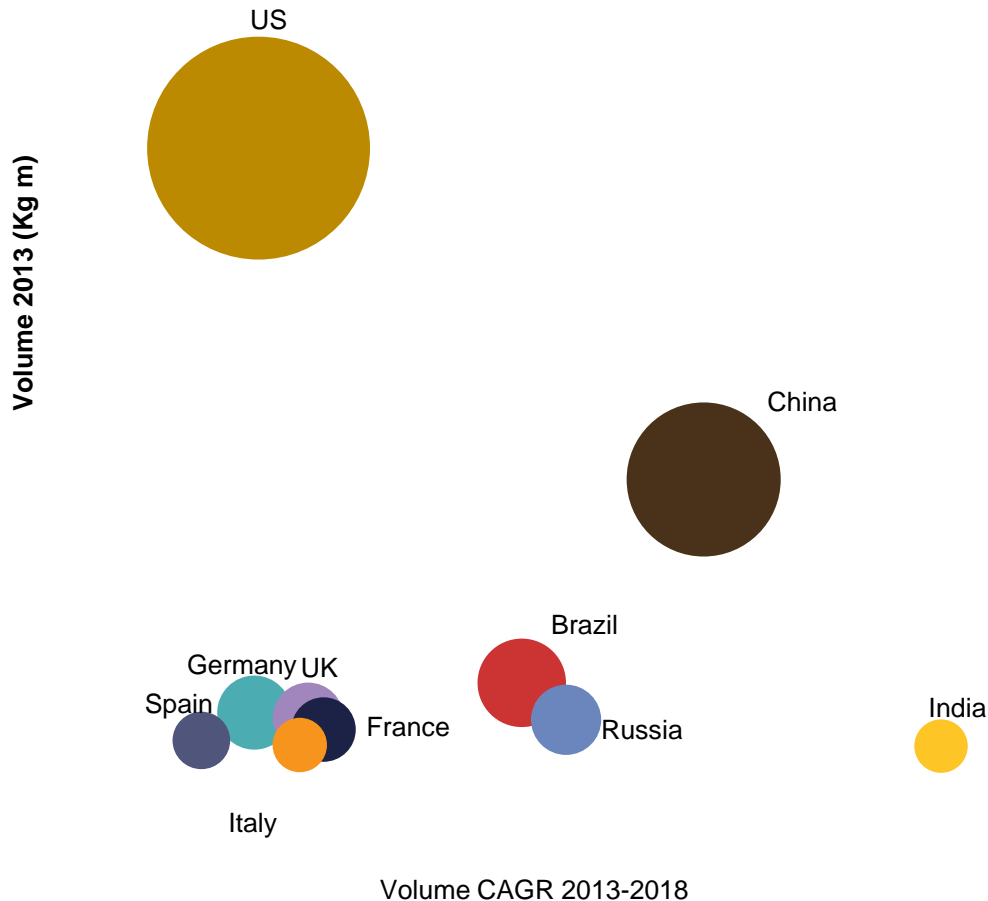
## The need for refrigeration:

Ice Cream melts quickly without refrigeration, limiting its ease of eating and storage compared to ambient products.

# Brazil has the highest per capita volume consumption among BRIC nations



Volume of **Ice Cream** sold globally and forecast CAGR over the period 2013-2018 (size of bubble denotes market volume)



**Brazilian Ice Cream market surpassed EU5 countries in volume terms:** Brazil has the lowest volume growth rate among the BRIC nations, however it is still growing faster than the US and EU5 nations. Brazil's Ice Cream market has surpassed the top EU5 countries in terms of overall market volume. Moreover, rising disposable incomes of the lower and middle class population is driving an increase in per capita consumption in Brazil which is also supported by innovations from manufacturers to target the value conscious mass market in the country. Events such as the 2014 FIFA World Cup and 2016 Rio Olympics are expected to increase volume consumption further. Canadian data forecasts that Brazil's Ice Cream market will grow at a CAGR of XX% during 2013-2018.

**High per capita occasions amongst BRIC nations:** The average Brazilian consumer enjoys XX Ice Cream occasions per year which is highest amongst the BRIC nations. However, this number is lower than in the EU5 countries, indicating room for growth.

# Premiumization and product innovation and will continue to influence consumption of Ice Cream in Brazil



## Degree of influence the Experience & Enjoyment mega-trend has on demographic groups



### Gender

The desire for Fun & Enjoyment and Indulgence is higher in women, at XX% and XX%, than in men, at XX% and XX%, respectively. This illustrates that women have a more emotive approach to ice cream and are more likely to trade-up if the product provides additional excitement, for example, via decadent flavor.

### Age groups

Consumption of Ice Cream motivated by Indulgence increases with age and peaks among Older Consumers at XX%. This shows how, with age, consumers are more likely to opt for more indulgent experiences. Older Consumers can be targeted with stronger and more distinctive flavors and textures featuring fruits or dessert pieces.

## How the Experience & Enjoyment mega-trend will evolve

Indulgence is also among the most influential trends, motivating XX% of Ice Cream consumption. The need for superior taste is the highest in Impulse Ice Cream, indicating to manufacturers where consumers are the most likely to look for novel indulgent flavors and textures. To attract consumers' attention to the indulgent nature of the product, manufacturers should underline the quality of the ingredients used, and their attributes, such as crunchiness of chocolate shavings and nuts used as filling.

The plethora of choice offered on the shelf, will result in premiumizing of the products and connoisseurship of ingredients, leading to demand for products that indicate geographic origin of fruits, nuts and cocoa beans, or the different percentage of cocoa in chocolate coatings.

# Marketing Ice Cream around fun and relaxation is vital for success on the Brazilian Ice Cream Market

Fun & Enjoyment and Personal Space & Time are the main motivators of the Brazilian Ice Cream market, influencing XX% and XX% of consumption volumes respectively. This means manufacturers and marketers should design and market their products towards creating and accompanying fun and enjoyable moments, such as spending time with friends during hot summer days, movies, and parties. This will help consumers to enhance their emotional connection with products and perceive them as a part of bonding and fun social events. The indulgent nature of Ice Cream products also goes well with the need to restore balance and recuperate, which will only increase with the developing economy. Urbanization and longer working hours mean consumers will appreciate relaxation moments during busy days more. Indulgent treats that associate themselves with accompanying break times will see an increased demand from Brazilian consumers.



**Product:** Wonka Peel-a-Pop

**Launched:** US

**Manufacturer:** Nestle USA

The product has an edible peel and resembles a banana. Brazilian consumers look for Fun & Enjoyment, and translate this desire in their choice of groceries, especially indulgent treats. By introducing a novel fun element, the product will stand out on the shelves and appeal to children and 'kidults'.

**Product:** Chich & Chong Hemp Ice Cream

**Launched:** US

**Manufacturer:** Bebida Beverage Company

This controversial hemp Ice Cream product targets relaxation occasions. Communicating relaxation via packaging design, media, or an association to fun times is key to success in the market.





# Global innovations on formulation and packaging can be a source of inspiration for Brazilian manufacturers



## Innovative **Global** launches in the **Ice Cream** sector



**Brand:** Khoroshilka

**Manufacturer:** Belgorod Khladokombinat

**Launched:** Russia, 2014

**Trend:** Fun & Enjoyment

Belgorod Khladokombinat introduced a new Ice Cream under the Horoshilka brand name. The product consists of a vanilla and chocolate Ice Cream in a funny face shaped figure. The face is made of Ice Cream while the eyes and mouth are made with chocolate.

**Brand:** Dracula Lolly Ice Creams

**Manufacturer:** Unilever

**Launched:** UK, 2013

**Trend:** Indulgence, Fun & Enjoyment

Walls re-introduced its Dracula Lolly Ice Creams with a new spooky packaging design. The product consists of vanilla ice cream and blood strawberry jelly with cola coating. The product's jelly centre changes the color of the tongue to blood red.



**Brand:** Three Twins

**Manufacturer:** Three Twins Ice Cream

**Launched:** US, 2013

**Trend:** Personal Space and Time, Experience Seeking, Indulgence

Organic ice cream marketer, Three Twins, introduced new ice cream sandwiches, in Sea Salt Caramel and Vanilla Bean flavors. They are positioned as a premium organic Ice Cream sandwich between sugar cookies. It is available in a single-serve pack or a pack of four.

**Brand:** Cadbury

**Manufacturer:** Bulla Dairy Foods

**Launched:** Australia, 2014

**Trend:** Indulgence, Fun & Enjoyment

Bulla Dairy Foods and Mondelēz Australia together collaborated to launch a new series of Ice Cream products under the Cadbury Marvellous Creations brand and is available in three flavors: Jelly Honeycomb Cookie, Jelly Popping Candy Beans, and Banana Candy Bubblegum Fudge Cookie.



## 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
    - 8 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.



## Consumer Trends Analysis: Understanding Consumer Trends and Drivers of Behavior in the Brazilian Dairy Food Market

Brazilians select Dairy products based on their ability to meet age-specific needs. This doesn't just apply to children, with older adults increasingly aware of their specific nutritional needs. Although poverty rates have declined rapidly in Brazil, the low income of many consumers means they will seek out the best value for money products.



## Consumer Trends Analysis: Understanding Consumer Trends and Drivers of Behavior in the German Bakery & Cereals Market

Indulgence is the primary driver of the German Bakery & Cereals market, motivating over two-fifths of consumption. The need is high in all categories, but peaks in the consumption of cookies and cakes with consumers perceiving these as the go-to categories for decadent, tasty treating where they desire rich taste experiences and novel texture combinations.



## Consumer Trends Analysis: Understanding Consumer Trends and Drivers of Behavior in the UK Savory Snacks Market

As an effect of the recessionary environment in the country, people are eating out less and entertaining more at home, engaging in indulgent snacks as an affordable treat to offer friends and family. Savory Snacks are relatively low cost, even for more premium offerings, making them an attractive way of treating oneself regardless of the occasion.