

# ICE CREAM – GERMANY – 2020

As a fall in core users and scrutiny of healthiness will put ice cream under pressure, better-for-you variants and elevated indulgence hold potential for growth.



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# Report Content

## EXECUTIVE SUMMARY

- Mintel's perspective

### Market context

- Healthy eating is high on consumer and government agendas
- Healthy eating is high on consumer and government agendas
- Ice cream sales boosted in 2018 by exceptional summer
- Ice cream sales boosted in 2018 by exceptional summer
- Ageing population poses a challenge for ice cream
  - Graph 1: frequency of use of ice cream, by age and parental status, August 2019

### Mintel predicts

- Ageing population and intense competition will put pressure on sales
- Sales to moderate following exceptional summers
- Newness is vital for the category
- Response to scrutiny of healthiness is a key factor in the outlook

### What consumers want and why

- Consumers want: indulgence
- Consumers want: indulgence
- Consumers want: to limit dairy intake
  - Graph 2: types of ice cream eaten in the last three months, August 2019
- Consumers want: healthier ice cream
  - Graph 3: selected factors to prompt more frequent ice cream usage, August 2019

### Opportunities

- Amp up indulgence with texture and alcohol
- Amp up indulgence with texture and alcohol
- Address quality concerns to capitalise on interest in limiting dairy
- Address quality concerns to capitalise on interest in limiting dairy
- Convince users of the treat credentials of better-for-you variants
- Convince users of the treat credentials of better-for-you variants

### The competitive landscape

- Unilever enjoys a strong lead but private label gains share
- Unilever retains top position in the ice cream market both in value...

- ...and volume terms in 2018

## Marketing mix

- A snapshot of the ice cream category in Germany
- Quick download resources

## MARKET DRIVERS

- Government reduction strategy on salt, sugar and saturated fat
- Government reduction strategy on salt, sugar and saturated fat
- Consumers pay attention to their diets
- Sugar remains in the spotlight as a health foe
- Mintel Trend Help Me Help Myself
- Nearly one in five people report dairy avoidance in household
- Nearly one in five people report dairy avoidance in household
  - Graph 4: dairy avoidance in the household, by age of respondent, Q4 2018
- One in three 16-24s see plant-based milk as healthier than dairy
- 2018 heatwave boosts ice cream sales
  - Graph 5: average temperature, April-October, 2016-19
- Ageing population in Germany poses a challenge for ice cream
  - Graph 6: population by age group, 2014-24

## WHAT CONSUMERS WANT AND WHY

### Ice cream usage

- Nine in ten people eat ice cream in Germany
  - Graph 7: types of ice cream eaten in the last three months, August 2019
- Young adults and parents are core users
- Young adults and parents are core users
  - Graph 8: frequency of use of ice cream, by age and parental status, August 2019
- Non-dairy ice cream holds untapped potential

### Behaviours relating to ice cream

- Healthiness is of limited concern in ice cream
  - Graph 9: behaviours relating to ice cream, August 2019
- Image as a rare enough treat will keep ice cream on the menu
- Image as a rare enough treat will keep ice cream on the menu
- Two in five ice cream launches reference texture
  - Graph 10: ice cream product launches by texture references on-pack, 2016-19

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- New textures to engage the senses can win over users
- Ice cream with alcohol sparks widespread interest
- Popsicles can link with cocktails to tap into this interest
- Interest in better textures in dairy-free ice cream points to opportunities
- Interest in better textures in dairy-free ice cream points to opportunities
- Communication and NPD need to improve perceptions of dairy-free ice cream
- Oats and nuts can bring texture to dairy-free

### Factors to prompt eating ice cream more often

- All-natural ingredients, low sugar/calorie formulations and indulgent recipes appeal widely
  - Graph 11: factors to prompt more frequent ice cream usage, August 2019
- Lower calorie ice cream sees modest usage...
- Lower calorie ice cream sees modest usage...
  - Graph 12: low calorie dairy ice cream usage in selected countries, 2019
- ...but can drive ice cream volumes
- ...but can drive ice cream volumes
- "Real indulgence, just lighter"
- Calorie-free and low calorie sweeteners are seen as less healthy than other sugars and sweeteners, except for Stevia
  - Graph 13: perceptions of sugars and sweeteners as healthy, 2018
- All-natural/no additives proposition can help ice cream to drive interest
  - Graph 14: launches of ice cream with all-natural or no additives/preservatives claim, 2015-19
- Mintel Trend The Real Thing
- Launches with all-natural ingredients are rare
- Honey is perceived widely as a natural and healthy sweetener
- Looking to honey to elevate a clean label proposition
- High-protein ice cream launches leap ahead
- High-protein ice cream launches leap ahead
  - Graph 15: share of launches with high/added protein claims of all ice cream launches, 2015-19
- Protein plays in a better-for-you proposition

### Further behaviours related to ice cream

- International ice cream sparks marked interest
  - Graph 16: further behaviours related to ice cream, August 2019
- Young consumers are most interested in international ice cream
  - Graph 17: agreement with the statement "I'd like to try more ice creams from other countries", by age, August 2019
- International inspiration spans from flavours to textures
- The time is right for gelato
- Snacking is a more popular occasion than dessert for ice cream
- Scope to explore wider usage occasions

## Attitudes towards ice cream

- Consumers want clear calorie content labelling on ice cream
  - Graph 18: attitudes towards ice cream, August 2019
- High demand for transparency on calories
- High demand for transparency on calories
- Lower calorie credentials are a central selling point of recent launches
- Lower calorie credentials are a central selling point of recent launches
- Leveraging transparency beyond calories

## LAUNCH ACTIVITY AND INNOVATION

- Dairy-based ice cream dominates launches, but plant-based is gaining
  - Graph 19: share of product launches in retail ice cream market by type, 2015-19
- Vegan claims gain share of launches in 2019
- Vegan claims gain share of launches in 2019
  - Graph 20: vegan claims in ice cream product launches, 2015-19
- Plant-based options in 2019 span across leading brands...
- ...and private label
- Smaller players step up NPD
  - Graph 21: ice cream launches by top 10 ultimate companies, 2015-19
- Unilever remains a key player in NPD
- Unilever brand extensions span formats, flavours and better-for-you
- "Refreshingly sustainable"
- Artisan ice cream from Germany makes its mark
- Brands from other categories enter the ice cream market...
- ...some focusing firmly on adults
- Low calorie/sugar launches gain share rapidly in 2019
  - Graph 22: launches of low calorie/sugar ice cream, 2015-19
- Low sugar/calorie ice cream launches

## Advertisement

- Magnum invites fans to "Never stop playing"
- "Never stop playing"
- Froneri focuses on adventures for its new premium brand
- "Choose your adventure"

## MARKET SHARE

- Unilever retains a strong lead in the ice cream market...

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- ...but private label and smaller brands gain
- Unilever retains strong lead in the ice cream market
  - Graph 23: company retail market share of ice cream by volume and value, 2017-18

### Retail market share of ice cream by value and volume, 2017-18

- Unilever retains top position in the ice cream market both in value...
- ...and volume terms in 2018

## MARKET SEGMENTATION, SIZE AND FORECAST

### Market size and forecast

- Beautiful summers boosted sales in 2018 and 2019
- Return to the norm and modest growth ahead
- Sales to moderate following exceptional summers
- Return to norm ahead, followed by modest volume growth
- Family packs retain lead by volume
- Sustained good weather in 2018 boosts larger formats
- Steady warm temperatures boost planned purchases more than impulse
  - Graph 24: retail volume sales of ice cream, by segment, 2016-18
  - Graph 25: value retail sales of ice cream, by segment, 2016-18
- Steady warm temperatures boost planned purchases more than impulse

## APPENDIX

### Appendix – products covered, abbreviations and consumer research methodology

- Products covered in this Report
- Consumer research methodology
- Abbreviations

### Appendix – market size and forecast

- Forecast methodology
- Forecast methodology – fan chart

### Germany: value retail sales of ice cream, 2014-24

- Market size and forecast – value

### Germany: volume retail sales of ice cream, 2014-24

- Market size and forecast – volume

### Germany: retail value sales of ice cream, best- and worst-case forecast, 2019-24

- Germany: retail value sales of ice cream, best- and worst-case forecast, 2019-24

### Germany: retail volume sales of ice cream, best- and worst-case forecast, 2019-24

- Germany: retail volume sales of ice cream, best- and worst-case forecast, 2019-24

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