

ICE CREAM – THAI CONSUMER – 2022

Opportunity lies in boosting regularity in ice cream consumption by demonstrating value via novel flavours, healthful attributes and tapping into snacking occasions.



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Ice Cream - Thai Consumer - 2022

This report looks at the following areas:

- The penetration of ice cream by formats/types in the Thai market
- Key consumers of ice cream in the market
- Important factors of consideration when consumers choose ice cream products
- Product features that consumers are willing to pay more for in ice cream products
- Consumers' ice cream purchase behaviours
- Consumer attitudes towards ice cream



Opportunity lies in boosting regularity in ice cream consumption by demonstrating value via novel flavours, healthful attributes and tapping into snacking occasions.

Overview

Ice cream has a high penetration (97%) in the Thai market, but its regular consumption remains limited. Only 27% of Thais are regular ice cream consumers (ie they consume ice cream at least three times a week). Brands can focus on increasing its relevance in the daily lives of consumers.

When choosing ice cream, flavour stands as the most important factor of consideration. Thais, specifically younger Millennials, are adventurous in their flavour choice, with their preference gearing towards new ones. This consumer cohort is driven towards ice cream innovations that offer multisensorial stimulation.

Following flavour, added health benefits is the second most important factor of consideration when choosing ice cream, especially for consumers aged 35+. Ice cream has a lingering negative health perception, with 60% of Thais agreeing with the statement '*eating ice cream*

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regularly is unhealthy'. Brands can focus on combatting this perception to increase regular consumption. Innovations that strike a balance between health and indulgence will be essential for the category.

Ice cream is growing in popularity as a midday snack; **40% of regular ice cream consumers** have it as a midday snack. Ice cream brands can strengthen their positions in the snacking space and move beyond the midday occasion to drive regular consumption.

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Report Content

EXECUTIVE SUMMARY

- What you need to know
- Mintel's perspective

Key issues covered in this Report

- Overview
- The impact of COVID-19 on ice cream
- Inflation will drive demand for affordable ice cream varieties
- Artisanal ice cream is the new big thing for affluent Thais
 - Graph 1: consumers that have consumed more artisanal ice cream, by monthly household income, 2022
- Flavour innovation is key in driving the appeal of ice cream products
 - Graph 2: important factors of consideration when purchasing ice cream products, 2022
- A balance between health and indulgence will be essential
 - Graph 3: any agree to select attitude statements about ice cream, 2022
- The snacking space is a disruptive opportunity for ice cream brands

Mintel predicts

- The outlook for ice cream
- The marketing mix

KEY TRENDS

- What you need to know

The adventuresome consumer: hunger for new experiences

- Experiences are gaining higher price tags
- Consumers' desire for novel experiences sets the bar for flavour innovations
- Global ice cream brands are venturing into unique flavour groups to provide excitement
 - Graph 4: share of ice cream launches by flavour component group, 2019-22
- Mintel Trend: Sense of the Intense
- Global ice cream brands are providing consumers with fun textural experiences

The health-fanaticism: growing demand for permissible indulgence

- Food and drink choices move beyond passing whims as consumers become more mindful
- Global ice cream brands are flagging protein content to communicate high nutritional value
- Consumers are migrating towards products with natural formulations as a better-for-you option

The daily escapism: snacking and comfort eating are on the rise

- Consumers are indulging in comfort foods as a way to manage stress
 - Graph 5: how consumers manage stress, 2021
- Mood to Order: emotional wellbeing needs will impact food and drink choices
- COVID-19 has driven an increase in consumers' snacking behaviour
- Transumers: snacking on-the-go

The economic uncertainty: inflation causes budget constraints

- Inflation will drive the need for affordable indulgence

CONSUMER INSIGHTS

- What you need to know

Consumption of ice cream

- Ice cream has near-saturated penetration, but regular consumption remains limited
- Urban Bangkok Millennials are core consumers of ice cream
 - Graph 6: select behaviour 'I eat ice cream regularly (ie at least three times a week)', by generation, region, area, 2022
- Ice cream's appeal is shrinking among Thai consumers
 - Graph 7: change in consumption of ice cream types in the past six months, 2022
- Suburban and rural consumers are reducing consumption across formats
 - Graph 8: consumers who have consumed less ice cream across types, by area, 2022
- Financially struggling consumers are cutting down on the luxury of ice cream
 - Graph 9: consumers that have consumed less ice cream across types in the past six months, by financial situation, 2022
- Despite inflation impacting consumption, artisanal ice cream gains traction among affluent consumers
 - Graph 10: increase in consumption of artisanal ice cream in the past six months, by monthly household income, 2022
- Artisanal ice creams are growing in popularity among Bangkokians
 - Graph 11: increase in consumption of artisanal ice cream in the past six months, by region, 2022
- Urban Bangkokians are increasing consumption of both impulse and take-home ice cream formats
 - Graph 12: consumers that have consumed more ice cream across select formats, by region and by area, 2022
- Driving in-home consumption, regular ice cream consumers stock up on multipacks
 - Graph 13: consumers that have stocked up more multipack ice cream at home compared to six months ago, by consumers that eat ice cream regularly vs total, 2022

Deliver value through multisensorial innovations

- Flavour trumps by high margins when choosing ice cream
 - Graph 14: most important factors of consideration when choosing ice cream products, 2022
- Younger Millennials are adventurous flavour seekers

Ice Cream – Thai Consumer – 2022

- Graph 15: any agree to attitude statement 'new ice cream flavours are more appealing than traditional flavours', by generation, 2022
- Innovate with cross-category flavours to create excitement for younger Millennials
 - Graph 16: agreement to attitude statement 'ice cream with flavours from different categories is appealing (eg cheese, spice), by generation, 2022
- Olfactory properties can drive appeal among younger Millennials
 - Graph 17: agreement with attitude statement 'the aroma of ice cream helps build an exciting experience when eating', by generation, 2022
- Textural excitement is imperative to retaining regular ice cream consumers
 - Graph 18: consumers who choose ice cream with fun textures, by consumers who eat ice cream regularly, vs total, 2022
- Traditional flavours will remain relevant for older consumers
 - Graph 19: select behaviour 'I usually choose traditional flavoured ice cream (eg vanilla), by generation, 2022

Build ice cream's health value

- Strike a balance between health and indulgence to combat the lingering negative health halo of ice cream
 - Graph 20: any agree to select attitude statements about ice cream, 2022
- Added health benefits can trigger consumption among consumers aged 35+
 - Graph 21: consumers that select 'provides health benefits' as an important factor of consideration when choosing ice cream products, by age groups, 2022
- Remove nasties from ice cream for consumers aged 35+
 - Graph 22: willingness to pay more for select attributes in ice cream innovations, by age groups, 2022
- Consumers aged 45+ seek clean-label innovations with all-natural claims
- Leverage ice cream's position as an emotional indulgence to deliver cognitive wellness benefits
 - Graph 23: agreement level towards select attitude statement, 2022
- Enhance the health value of ice cream for women consumers with added collagen
- Pair low-fat and added-collagen claims to reach six in 10 Thais

Strengthen ice cream's relevance in the snacking space

- Opportunity for ice cream to disrupt the snacking occasion
- Position as a snack for other dayparts beyond the midday occasion
- A variety of inclusions in ice cream innovations can meet needs for midday satiety
- Added probiotics and high protein content will enhance the functional value of ice cream as a snack
 - Graph 24: willingness to pay more for select attributes in ice cream innovations by consumers who consume ice cream as a midday snack, vs total, 2022

MARKET APPLICATIONS

- Opportunities: key areas of focus

Opportunity 1: appeal to the adventurous taste palates of Millennials with multisensorial innovations

- Move beyond fruit and sweet flavours to dial up innovations with less-common flavour profiles
 - Graph 25: share of ice cream launches, by flavour component group, 2019-22
- Feature bakery components in ice cream products
- Unconventional cross-category savoury food flavours: mac & cheese- and pizza-flavoured ice cream
- Offer international flavours through transportive ice cream innovations
- Entice adventurous Thai consumers with transportive ice cream flavours
- Dreyer's takes a journey to Japan with authentic Japanese flavours
- Communicate on the aroma of ice cream to enhance the consumption experience and provide adventure
- Embrace the sobriety trend with cocktail-inspired flavour pairings
- Co-branded flavours can offer novelty and excitement
- Provide an exclusive consumption experience with craft ice cream
- Opportunity to innovate with less-common ice cream textures
 - Graph 26: share of ice cream launches, by texture, 2019-22
- Expand ice cream textures with gooey and chewy elements
- Drive the visual experience of ice cream: the metaverse presents a new opportunity to stimulate consumers' senses

Opportunity 2: make ice cream's status as a guilty pleasure permissible

- Build the health notion of ice cream with plus, minus and functional claims
 - Graph 27: share of ice cream launches, by minus, plus, and functional claims, 2019-22
- Drive permissibility with low-/no-/reduced-fat and calorie- and sugar-free claims
- Communicate the fat, calorie and sugar content per serving
- Communicate fewer carbs without sacrificing indulgence
- Dial up clean and natural ice cream innovations
- Emphasise natural formulations
- Communicate 'free from nasties' claims: Burger King launches the Poop Emoji Ice Cream to exemplify clean ingredients
- Communicate added collagen on pack to broaden appeal
- Maximise appeal with low-fat, added-collagen and all-natural formulations
- Formulate with superfood ingredients for a healthy twist on indulgence
- Explore a range of functional ingredients to deliver in-demand functional benefits

Opportunity 3: strengthen ice cream's position in the snacking space

- Recreate ice cream cones to enhance snackability: cones made from cookies
- Format innovation: snacking cups with portioned indulgence
- Format innovation: bite-sized ice cream Cookie Dough 'Peaces'
- Bite-sized ice cream innovations position for snacking and sharing with a mess-free experience
- Position as a coffee accompaniment to disrupt the coffee-time snacking occasion
- Sleep-friendly ice cream: move beyond the midday snacking occasion and position for nighttime snacking

- Format innovation: ice cream shakes in pouches can provide a mess-free snacking experience
- High protein content can position for functional snacking and unlock new consumption occasions

APPENDIX

- Consumer research methodology

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