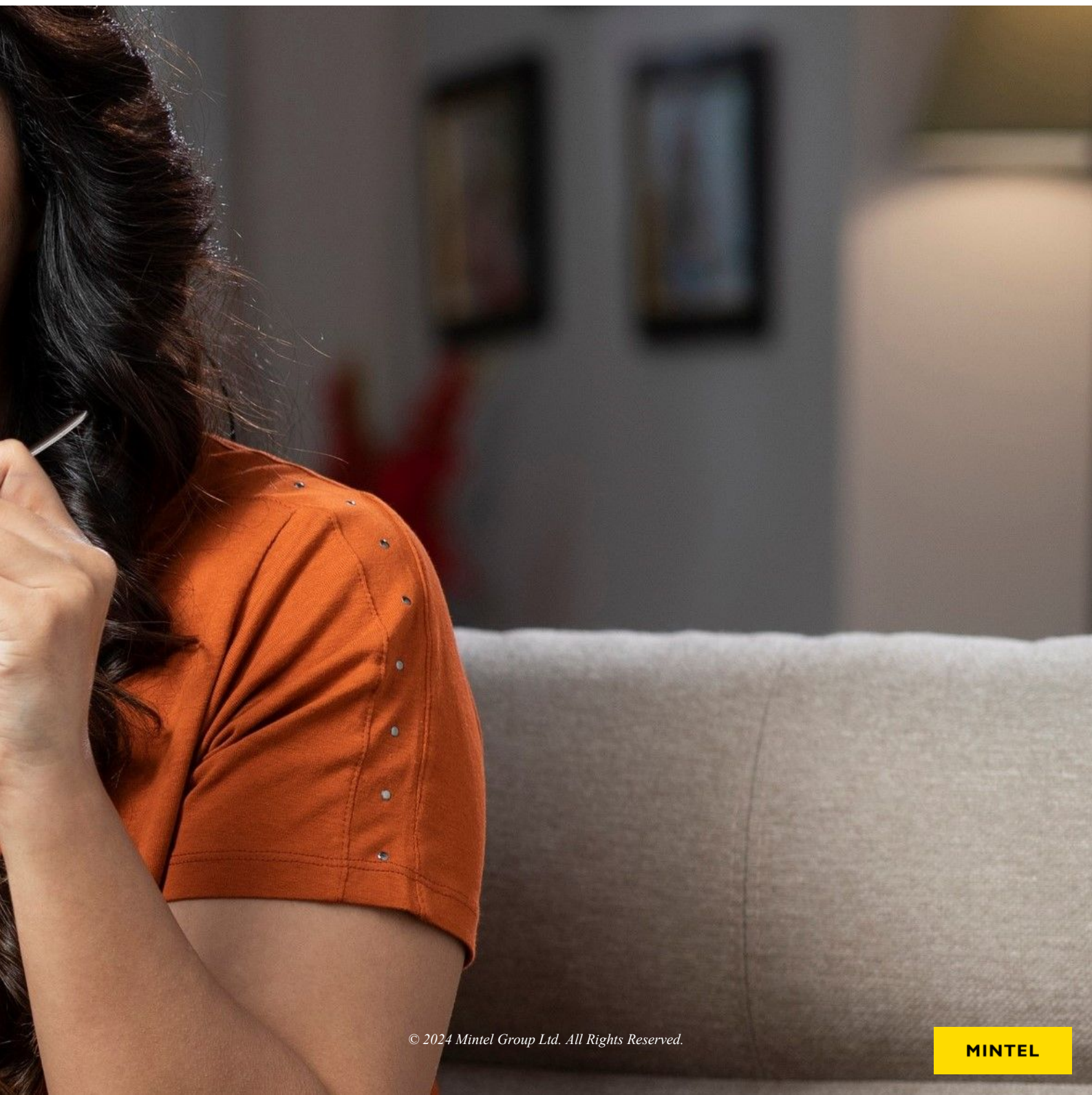


ICE CREAM – INDIAN CONSUMER – 2023

Premiumisation is rebounding post-pandemic. Consumers want ice cream made with superior-quality milk, and potential exists for flavour, texture and better-for-you innovation.



Tulsi Joshi, Senior Food & Drink Analyst, India



Ice Cream - Indian Consumer - 2023

This report looks at the following areas:

- Consumption frequency of ice cream in the last three months. An in-depth analysis of consumer segments (heavy, moderate and light) based on consumption frequency
- Ice cream features consumers are willing to pay more for
- Important factors for ice cream to be considered healthy
- Flavour innovations driving ice cream consumption
- Three key trends shaping the ice cream industry in India
- Consumer attitudes towards ice cream



Premiumisation is rebounding post-pandemic. Consumers want ice cream made with superior-quality milk, and potential exists for flavour, texture and better-for-you innovation.

Overview

The Indian ice cream category saw a rise in premium claims in the three years to 2020; however, the pandemic interrupted this streak. Post-pandemic, innovation is beginning to rebound; in 2022, 17% of Indian ice cream launches carried a premium claim, up from 12% the previous year. Though premiumisation efforts have yet to reach pre-pandemic levels, growth potential remains as consumers express a willingness to spend more. This Report takes a deep dive into the features consumers value most and are willing to increase spending on.

The Report highlights the pivotal factors that consumers consider healthy in ice cream, which can direct brands to innovate a better-for-you approach to target the growing health-

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conscious consumer. Also explored here is the flavour innovation potential that can drive ice cream consumption among experimental consumers.

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Report Content

EXECUTIVE SUMMARY

- Mintel's perspective

Key issues covered in this Report

- Overview
- Build narratives around milk and texture superiority to drive premiumisation
- Opportunity for better-for-you ice cream
- Metro consumers want flavour novelty; innovate with mithai and seasonal flavours and co-branding opportunities
- Metro consumers want flavour novelty; innovate with mithai and seasonal flavours and co-branding opportunities

Mintel predicts

- The outlook for ice cream in India

KEY TRENDS

- What you need to know
- Innovation activity has gathered steam in the last 12 months
 - Graph 1: % share of total ice cream launches, 2018-23
 - Graph 2: % of ice cream launches, by launch type, 2018-23
- Dairy-based ice cream continues to dominate; niche plant-based variants are cropping up
 - Graph 3: % of ice cream launches, by sub-category, 2018-23
 - Graph 4: % of launches, by sub-category, 2018-23
- Tub format's share declines as flexible packaging rises
 - Graph 5: % of ice cream launches, by launch type, 2020-23
 - Graph 6: % of ice cream launches, by packaging type, 2020-23

Cold chain, tech and ecommerce fuel expansion opportunities

- Developing cold-chain facilities are the key to India's frozen food future
- Ecommerce channels boom in India
 - Graph 7: top three online platforms/retailers used by online shoppers more often while shopping online in the last six months, 2023
- HUL bets big on ecommerce
- Competition to intensify on online platforms for delivery footprint expansion
- Unilever puts a modern spin on the classic ice cream truck
- Magnum in Metaverse
- Baskin Robbins uses Generative AI to showcase summer treats

Rising demand for healthier indulgent variants

- Consumers are making health-conscious purchase decisions
- Consumers increasingly demand healthier versions of indulgent foods
- Ice cream brands are increasingly healthifying their offerings
- Naturalness is becoming an integral part of healthfulness
- Demand for the 'the real thing' propels the popularity of A2 milk

The cultural connection

- Consumers want to culturally connect with food and drinks
- Consumers continue to seek ethnic Indian flavours
- Indian ethnic flavours gain traction in indulgence-centric food and drink

WHAT CONSUMERS WANT AND WHY

- What you need to know

Ice cream consumption in India

- Half of Indians are ice cream consumers
 - Graph 8: consumption of ice cream in the last three months, by gender, generation, employment status and current financial situation, 2023
- Consumption of ice cream decreases with age, and increases with affluence
 - Graph 9: consumption of ice cream in the last three months, by socio-economic class, 2023
 - Graph 10: consumption of ice cream in the last three months, by age, 2023
- Almost a quarter of ice cream consumers eat ice cream at least once a week
- Three types of ice cream consumers
- Heavy consumers: demographic profile
- Moderate consumers: demographic profile
- Light consumers: demographic profile

The premiumisation opportunity

- Premiumisation in ice cream gathers momentum in the post-pandemic era
 - Graph 11: % ice cream launches with 'premium' claim, 2016-2023
- Indian consumers are willing to pay more for superior-quality milk and textural innovations
 - Graph 12: features ice cream consumers are willing to pay more for, 2023
- Premiumise ice cream with full-fat and A2 milk
 - Graph 13: agreement with select statements related to ice cream, by city tier, 2023
- Beyond the real milk narrative, stand out with superior milk quality
- Make a bold and appealing A2 milk claim on front and centre of the pack
- Heavy and moderate consumers want superior milk quality, while light consumers prefer smooth texture

Ice Cream – Indian Consumer – 2023

- Indulge heavy ice cream consumers with thick/dense texture
- Smooth texture is the topmost premiumisation feature for light ice cream consumers
 - Graph 14: top five features in ice cream light consumers are willing to pay for, 2023
- Communicate smooth/velvety texture's supremacy
- Format novelty can appeal to nearly a quarter of heavy ice cream consumers
- Target experimental heavy ice cream consumers with hybrid innovations
- Explore the combination of croissant and ice cream
- Ice cream-based beverages can expand ice cream's consumption occasions
- Ice cream-based beverages can strike a chord with moderate ice cream consumers
- Freshness can be an added feature for market expansion
- Seize the booming quick commerce opportunity
- Take inspiration from India's burgeoning DTC players
- Differentiate with freshness cues

Healthify ice cream

- Indians are interested in healthier ice cream, but scepticism persists
- Healthier ice cream versions appeal most to upper-tier and affluent consumers
 - Graph 15: % of ice cream consumers who are willing to pay more for healthier ice cream, by city tier and current financial situation, 2023
- Healthy ice cream is high in calcium and protein, low in sugar, and made using all-natural ingredients
 - Graph 16: important factors for ice cream to be considered healthy, by select consumer segment, 2023
- Status quo: natural and minus claims dominate, while plus and functional health grow, but remains a niche
 - Graph 17: % of launches with select claim category in ice cream, 2020-23
- Make a pro-protein appeal
 - Graph 18: % of consumers who cite high in protein as an important factor for ice cream to be considered healthy, by gender, age, socio-economic class, 2023
- Bring protein power front and centre
- High calcium claims hold potential for premiumisation
 - Graph 19: % of consumers who cite high in calcium as a feature in ice cream to be considered healthy, by consumer segment, 2023
- Appeal to the affluent and health-conscious with high/added calcium claims
- Champion naturalness to 'healthify' ice cream; stand out by going beyond no preservatives claims
 - Graph 20: % of consumers who cite the select feature as a marker of healthiness in ice cream, 2023
 - Graph 21: % of launches with natural claims in ice cream, 2020-23
- Champion naturalness to 'healthify' ice cream; stand out by going beyond no preservatives claims
- Make bolder natural claims
- Take inspiration from Naturals ice cream's success in driving naturalness positioning
- Go organic

Ice Cream – Indian Consumer – 2023

- Low-sugar is an indispensable factor to make an ideal healthy ice cream offering
- Communicate low sugar without compromising on indulgence
- New launch: Kwaliti Walls x Boost

Flavour innovations in ice cream

- Novel flavours can help brands premiumise their offerings
- Chocolate continues to dominate and grow; mango, nuts and butterscotch show a steady upward trajectory
 - Graph 22: top growing flavour component in ice cream, 2020-23
 - Graph 23: top flavour launches in ice cream, 2020-23
- Indian ice cream brands have a long way to go in terms of flavour innovation
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- Interpreting the map
- Leverage novelty with Indian mithai, seasonal fruit flavours and flavour-based co-branding opportunities
 - Graph 24: flavours of interest in packaged ice cream, 2023
- Explore a range of flavour innovations to expand market reach
- Mithai flavours present an opportunity for expansion during festive seasons and celebrations
 - Graph 25: select flavours of interest in packaged ice cream, 2023
- Look to festive mithai for flavour inspiration
- Ice cream brands break into the festive season with mithai flavours
- Target festive celebrations with Indian mithai flavours
- Mithai shops can be ice cream's new retail channel; encourage mithai pairing
- Make ice cream gift-friendly
- Opportunity to target affluent consumers with seasonal fruit flavours
- Introduce limited-edition seasonal fruit flavour packs that cue freshness
- Nostalgic flavours can connect seasonal fruits
- Lipton (US) uses nostalgia to target parents this summer
- Infuse fun in water-based lollies with seasonal fruit flavours
- Opportunity for popular cross-category food and drink brands to enter the ice cream space
- Time is ripe for global snacking brands to enter the Indian ice cream market
- Existing players can take inspiration from global brands to introduce co-branded offerings
 - Graph 26: % of launches with select claim in ice cream, 2020-23
- Explore ice cream formats in conjunction with biscuit and cookie brands
- Collaborate with indulgence-centric brands from different categories

APPENDIX

- Report definition
- Consumer survey methodology
- TURF methodology

About Mintel India Consumer

Access our reports now and we'll tell you how major trends are affecting India. We also hone in on the regional differences from socio-economic groups to demographics such as age, gender and household composition. We research consumers in Metro and Tier 1 to 3 cities across the 4 main regions and in 6 local languages.

In each report, we're analysing the trends and the innovations, the behaviours and the influencers of consumers across India. Our local expert analysts then examining the primary research and consumer data and translating it into what it means for you.

- ✔ Find out what Indian consumers want, what they need and what influences their purchasing decisions.
- ✔ Understand the Indian market and see how it fits into wider trends on a local and global level.
- ✔ Take advantage of the gaps and opportunities that exist today, tomorrow and beyond.

How Mintel Indian Consumer will help your business grow:

01

Segment consumers across India according to their regional and demographic differences so you can target them more effectively.

02

Analyse the latest trends and innovations and see how they fit at a local level to identify opportunities for your next big idea.

03

See action-oriented summaries to understand an area quickly or investigate the data to get an in-depth understanding of your market.

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