

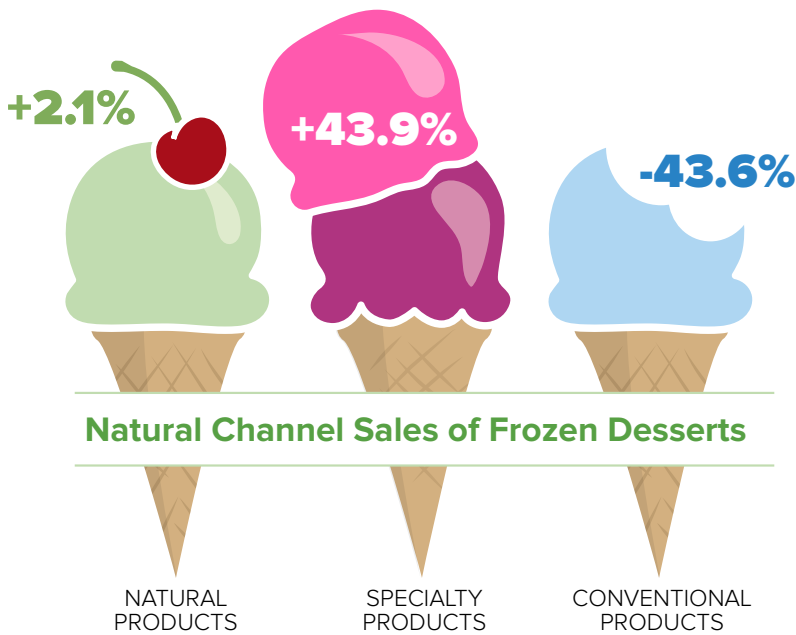


TRENDING FROZEN TREATS

How specialty and wellness innovation are keeping the category cool



Frozen treats are an indulgent category, and specialty and wellness-focused options for both dairy and plant-based varieties are taking center stage across the freezer section. Diversified dairy alternatives, gourmet flavors, and better-for-you treats are delighting consumers looking to beat the heat as this segment reaches its peak sales in summer months.



SPECIALTY SHINES

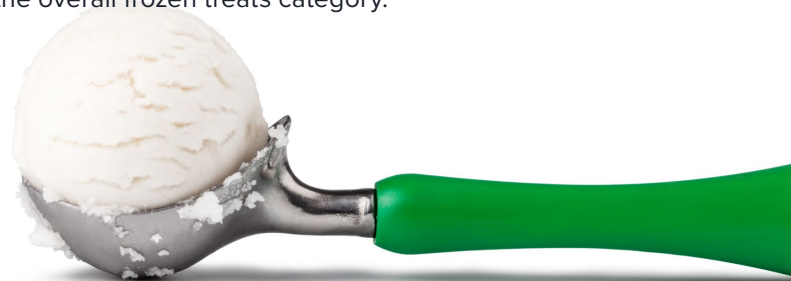
Using SPINS' proprietary **Positioning Group** attribute, data shows that frozen treats in the *Specialty & Wellness* group grew 10.6% over the past year to \$1.2 billion while the broader frozen-desserts category remained relatively stable, growing 0.7% to \$12.9 billion. Within the Natural Channel, however, where frozen desserts saw 3.8% growth to \$161.5 million, specialty products were responsible for the bulk of the growth, growing 43.9% to \$19.3 million, contributing twice the dollar growth of natural products, which hold much more market share within the channel.

DIVERSIFIED DAIRY ALTERNATIVES

Many consumers view plant-based products as a healthier alternative for people and the planet, and the plant-based ice creams and novelties subcategories showed strong performance over the past year with double-digit growth of 15.5% to \$276.7 million, although the growth for these products is slowing down compared to 37.7% growth over the previous year. Whether the initial boom in sales is behind us or we have yet to see the subcategory fully mainstream, as plant-based milk alternatives have in recent years, frozen plant-based treats are still enjoying solid growth rates as new brands bring innovation to market and established brands seek to diversify their portfolio to stay competitive and serve a wide range of consumers. Even in segments that are commonly plant-based, such as novelties like bars and pops, many brands are marketing their products as vegan to assure customers that their product does not contain honey or other animal by-products. Vegan label claims are up 11.4% to \$280.3 million across the overall frozen treats category.

PLANT-BASED ICE CREAMS & NOVELTIES

+15.5% | \$276.7M





With different varieties of plant-based milks growing across food and beverage, variety in the frozen section is also expanding. In addition to original options of soy, coconut, and almond milk in the frozen dairy-alternative space, now consumers can choose from options like cashew and oat milk for frozen treats, as well. Oat-milk products are a new player in frozen treats, showing solid performance in their first full year in the segment. **Oatly** expanded its product offering from plant-based milks to include a line of oat-based ice creams. The brand is committed to sustainability using UTZ-certified cocoa and has already improved its packaging, which they market as having 79% less climate impact compared to the previous version. **Hakuna Brands** has a line of Non-GMO Project Verified Totes Oats frozen non-dairy desserts with no refined sugar, sweetened instead with dates. **So Delicious**, an established player in the category, has also jumped on the trend with its new Oatmilk line of frozen desserts in unique flavor combinations like Caramel Apple Crumble and Peanut Butter & Raspberry.

Coconut-milk frozen treats, one of the earlier options for dairy alternatives, is continuing to perform well, growing 19.1% to \$89.1 million. While there have been multiple options in pints, new coconut-milk novelties are entering the space. **Daiya**, a brand originally specializing in dairy-free cheese, now makes frozen bars with a coconut-milk base that are also free of many of the allergens that are common in frozen treats, including dairy, eggs, gluten, peanuts, and soy. Coconut also plays well in blends with other plant-based dairy alternatives such as cashew milk, as in **Revolution Gelato's** dairy-free line of artisan flavors including Cardamom Spice and French Press Coffee. Although non-dairy blends are still a smaller subset of the market, they're quickly picking up speed with triple-digit growth as they emerge alongside the growing number of dairy alternatives in frozen treats.



CLEANER CLASSICS

Whether plant-based or dairy-based, brands are highlighting high quality standards and clean ingredient panels in frozen treats that provide cleaner alternatives to classic, nostalgic treats. **Good Pop** offers both options, including chocolate milk pops made with RBST-free milk and organic ingredients, alongside plant-based options such as coconut-cream-based, certified organic, Cookies'n Cream pops. The brand's Cherry Lemonade red, white, and blue popsicles are made with 100%-fruit juice and also use spirulina extract for color instead of artificial coloring. **Modern Pop's** cleaner take on classic treats includes fruit-based pops with flavor combinations like mango, pineapple, and pitaya or avocado-based fudge bars that are vegan and low in sugar. **Deebee's Organics** cleaned up old-school freezer pops with the organic, superfruit freezies made without artificial colors and flavors, and they're also free of the top eight allergens. **Ruby Rockets** further upgrades its cleaner classics to a new level, sneaking in veggies like carrots, spinach, and squash into its Better Bars and Veggie & Fruit pops that are also free of added sugar and made with organic, non-GMO ingredients.



TRENDING WAYS OF EATING IN FROZEN TREATS



In addition to plant-based, Paleo and keto trends are popular across food and beverage, and frozen treats are no exception, allowing consumers to indulge in something sweet without sacrificing their diet goals. Paleo-positioned frozen treats grew 19.3% to \$2.0 million over the past year. **MUD** dairy-free frozen desserts sweetened with dates have a wide appeal to both Paleo & plant-based consumers as well as flexitarians who may view plant-based as healthier or more environmentally friendly, as do **Vixen Kitchen's** Paleo vegan gelatos sweetened with maple syrup. **Snow Monkey** also markets its superfood ice treats as Paleo, packing its products with antioxidants, flavonoids, and protein from ingredients like acai, hemp protein, matcha, and sunflower seeds.



Keto enthusiasts can keep within their daily carb targets with plant-based treats from **Wink**, a 100-calorie, keto-friendly pint with pea protein, prebiotic fiber, and flax seeds, sweetened with a blend of stevia and monk fruit. For keto dieters that choose to consume dairy, **Mammoth Creameries** ice cream is rBST-free and made with cage-free eggs and grass-fed butter. **Rebel Creamery** also makes a keto ice cream that is high in fat and has only 5 to 8 g of net carbs per pint, featuring this number prominently in front-label marketing.



Not all dieters look for reduced carbs or high-fat keto products, and for those consumers focused on low-fat, low-sugar options with added protein — a trend that swept the frozen-desserts set in recent years — **Re:THINK Ice Cream**, also uses the front of its packaging to advertise its low-sugar and high-protein totals. Its ice cream contains whey protein, prebiotic fiber, and antioxidant-rich green tea extract, and it comes in gourmet and trending flavors such as Cardamom Pistachio, Meyer Lemon Poppysseed, and Turmeric Ginger.

Yasso makes Greek frozen-yogurt bars in regular and snack-sized snack versions that are marketed for their protein content and low calorie count. Its Snack Buddies line consists of 45-50 calorie treats with an advertised 25% less sugar than the leading novelty, with whimsical, kid-friendly marketing.



FROZEN GREEK
YOGURT PRODUCTS
+290.5% | \$6.0M

PALEO
KETO
LOW-SUGAR

INTERNATIONALLY INSPIRED TREATS

Mochi ice cream is a trending specialty treat with triple-digit growth of 102.8% to \$44.3 million, not including additional sales from the increasingly popular self-serve mochi cases popping up in grocery stores everywhere. The Japanese word mochi refers to the chewy, glutinous rice dough that encases the bite-sized, flavored ice cream balls. **My/Mo** makes mochi in a variety of flavors from traditional Green Tea to trending Salted Caramel, and the brand also has non-dairy, vegan options as well as pints of ice cream with mochi bits for an innovative twist. **Bubbies** also has mochi with modern flavors like Blood Orange and Red Velvet as well as mochi-inspired novelties wrapped in cookie dough (instead of rice dough) in varieties like Birthday Cake and Brownie Batter.

Foodservice is currently a hotbed of ice-cream innovation with other internationally-inspired frozen novelties like gelato roses, macaron ice-cream sandwiches, paletas, and Thai rolled ice cream; will any of these visually tempting, instagrammable treats inspire retail innovation in the near future?

↑ **102.8%**
MOCHI ICE CREAM



ARTISAN BRANDS MAKE IT BIG

Many small artisan brands got their starts in foodservice or in local retailers, then scaled up and brought variety into the larger retail market with unique and unusual flavor combinations. **Big Gay Ice Cream** started as a seasonal ice-cream truck in New York City that quickly became a sensation, and now the company offers retail pints in bright, bold packaging with flavors like Blueberry Gobbler featuring pie-crust pieces and blueberry balsamic swirls mixed into vanilla ice cream. **Jeni's** is a Certified B Corporation with both retail and foodservice offerings, working towards zero-waste shops and offering pints in gourmet flavors like Goat Cheese with Red Cherries and Middle West Whiskey & Pecans. Alcohol-infused flavors as well as varieties that combine sweet and savory ingredients are on trend in artisan ice-cream brands, and **Eat Me** also offers both retail and foodservice pints in innovative flavors such as Bourbon Vanilla Bean, I Dream of Italy with olive oil & basil, and Sweet Corn.



ON THE HORIZON

Similar to other categories throughout food and beverage, trending functional ingredients CBD and medicinal mushrooms are making their way into frozen treats. **Ben and Jerry's** plans to bring CBD-infused ice cream into retail, and CBD-infused Italian ice is already being sold at Josie's Frozen Custard locations in northeast Pennsylvania. Medicinal mushrooms appearing in a few brands such as **Sacred Serve**, a plant-based gelato with a Chaga Chocolate variety that combines the mushroom with other superfoods such as Peruvian maca and Dominican cacao. Medicinal mushrooms have also been spotted in **Green Girl Bakeshop's** ice-cream sandwiches that feature a range of superfood ingredients such as ashwaganda, reishi, and turmeric and in **Dream Pops'** Chocolate Lion, geometric-shaped novelty containing lion's mane mushroom.

SPINS is keeping a close eye on the category to see which functional ingredients will find their way into frozen treats next and what other innovations might keep the category cool, such as new nut- and seed-milk alternatives or flavor trends from foodservice and around the world.



Are you leveraging SPINS data and trendspotting insights to keep your business on the leading edge?
Contact Emily Temkin at sales@spins.com to learn more.