

# The Grocer

Focus On: Ice Cream by Simon Gwynn (Simon.Gwynn@wrbm.com)

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## The Story

**Take home value sales have inched up but supermarkets have sold fewer kilos of ice cream in the past year, a decline of 1%. What's causing volumes to fall and value sales to rise? Why is the sector defying the general deflation in grocery? Which parts of the market are performing best and worst and why? What does the coming year hold for the sector?**

## Key themes:

**Retailers:** This feature will analyse how the different major retailers have approached the category in the past year, with particular attention being paid to branded and own label ranging and product development and space allocation. To what extent has the sector been affected by range rationalisation?

**Health:** This feature will weigh up exactly how the whole health debate is impacting the ice cream market, with particular attention being paid to recent pledges by manufacturers to reduce the size of ice creams in order to cut calorie count. Is this really about health or is it just a means of brands safeguarding their margins and coping with retailers' demands for lower prices?

**Seasonal events:** How are players looking to 'de-seasonalise' the sector? Can developing products for seasonal events such as Easter and Christmas help? We will be profiling four new seasonal, non-summer products in a separate box out.

**Dessert:** Ice cream is no longer just about grabbing a cone or a lolly from a forecourt on a hot summer day; manufacturers are looking to establish ice cream as a sophisticated dessert. So who's doing what in this area? And, given that our research shows that there has been a reduction in ice cream consumption for dessert, how successful have they really been?

**Chocolate snacks:** Ice creams defined as 'chocolate snacks', primarily chocolate coated ice cream sticks and ice cream versions of chocolate countlines are still the market's biggest sector and they're in growth. This feature will explore the brands, own label manufacturers and retailers that are driving this and how they are using factors like NPD, promotions and advertising to win sales.

**Kids:** Ice creams and lollies aimed specifically at kids are in decline at present. This feature will explore the factors that are driving this and how brands, own label manufacturers and retailers are looking to use factors like NPD, promotions and advertising to turn things around. How important are licensed products to this sector?

**Adult lollies:** This feature will explore why this area is one of the strongest performing in the category. Which brands are driving the sector's nearly 20% growth and how? What are they doing to maintain it over the coming year?

**Frozen yoghurt:** Many of the major players have been investing in frozen yoghurt in recent years. This feature will explore in detail how these brands have been performing in the past year with a particular focus on how the host of smaller brands in this increasingly crowded category are being affected by the growing attention larger players are paying it.

**Discounters:** With the discounters stealing growing share of ice cream from the supermarkets, this feature will include an exploration of the product offerings of these retailers and how they are managing to grow at such an impressive rate. What can the mainstream retailers learn from them, other than the need to offer low prices?

**Own label:** Own label is outgrowing brands. This feature will explore the factors that are leading to this and investigate whether any brands are bucking this overall trend. Another focus will be on how brands' prices are being affected in the battle with own label.

**Innovation:** This will be key to this feature. We will be investigating how new product development has shaped the category over the past year and what is in store for shoppers in 2014. We will be profiling four of the most interesting tub ice cream, handheld ice cream, sorbet/non-dairy ice cream launches in a separate innovation panel.

**Key questions the feature is likely to address:**

- What consumer trends have impacted the category over the past year?
- How have promotional strategies (both in terms of price and marketing) evolved?
- How have individual retailers' strategies impacted the market?
- How has merchandising changed in the market?
- What impact has own-label had on branded players?
- What's next for the category?