

CREATIVE ICE CREAM TRENDS FLAVOURS

FLAVOUR FOCUS: ICE CREAM

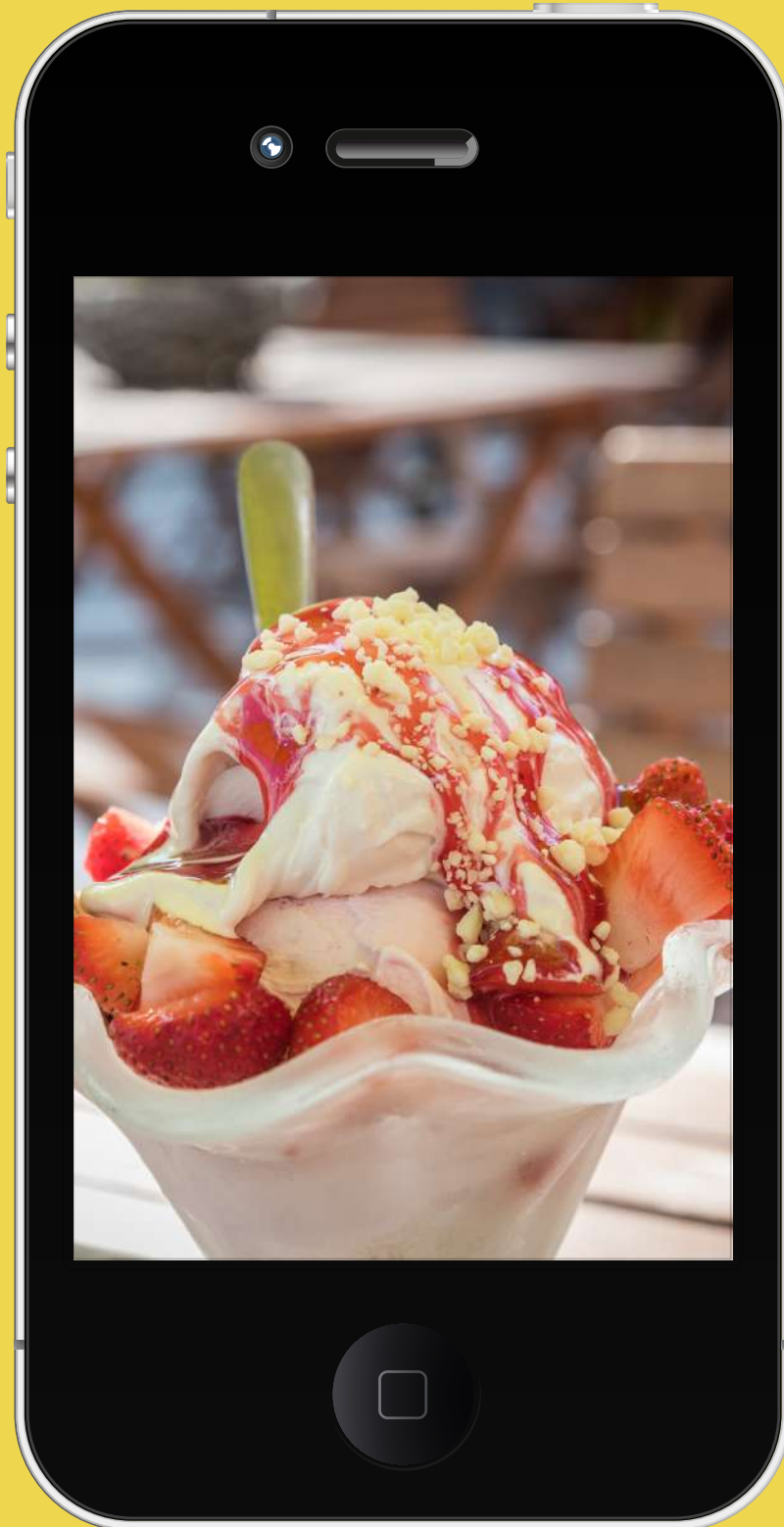
**NATURALNESS IS EMERGING AS A
KEY THEME IN FLAVOUR TRENDS
FOR ICE CREAM**



**1. CLASSICS ARE COMFORTING:
CHOC & VANILLA FAVOURITES, NEED MODERN TWIST**

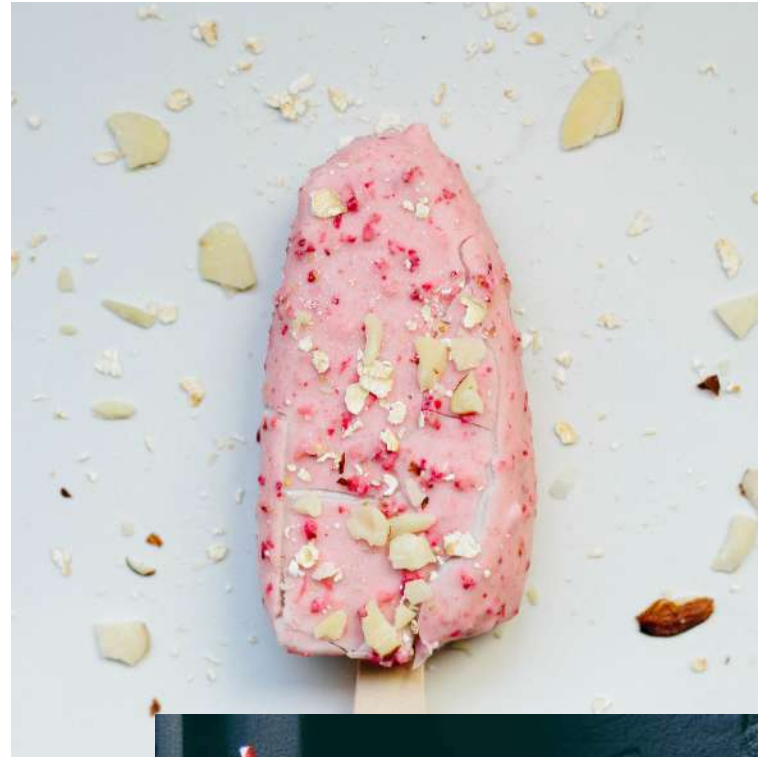
**2. EXPERIMENT TO EXCITE:
CONSUMERS, PARTICULARLY YOUNG WANT NEW FLAVOUR
EXPERIENCE, FOR PLEASURE AND TO SHARE ON SOCIAL
MEDIA.**

**3. GO NATURAL FOR PERMISSIBILITY:
DESIRE FOR SWEET TREATS & INTENTION TO EAT
HEALTHY, WANT TREATS THAT APPEAR NATURAL AND
WHOLESOME & USE NATURAL FLAVOURS**



INSTA EFFECT

- Ice cream featured heavily on social media
- 63% US millennials enjoy snapping food
- Image and aesthetics are everything in food!
- Artful construction, eye-catching colours, and over-the-top indulgence



INTERNET SENSATIONS

- Freakshakes have gone viral on the internet.
- Purple ube, or sweet potato, is a trending flavour in ice cream
- Pantone naming Ultra Violet the colour of the year for 2018

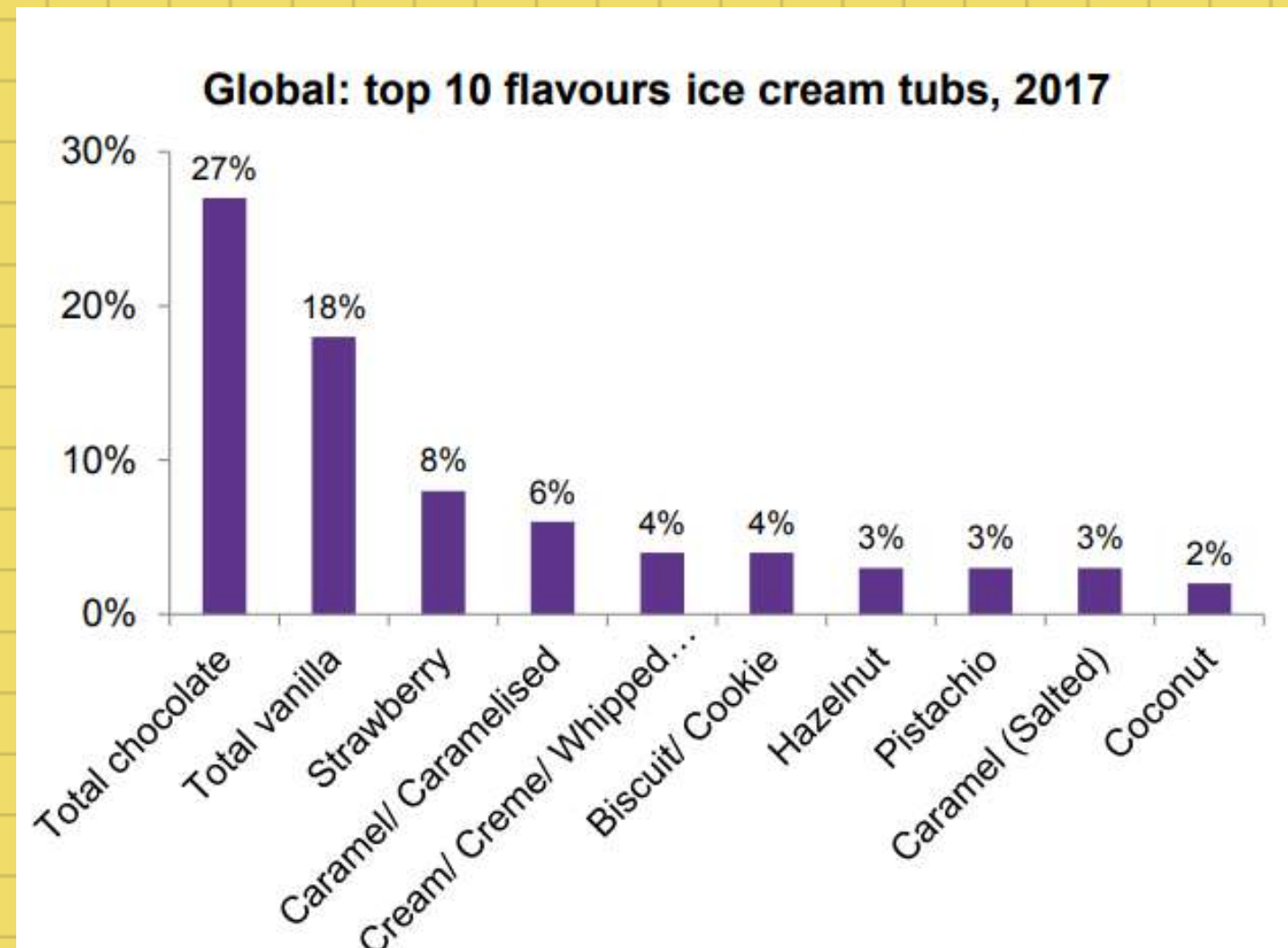


FLAVOUR TRENDS IN ICE CREAM

- **Leading flavours** •

**DOMINATED BY CHOCOLATE,
VANILLA AND STRAWBERRY**

**CLASSIC FLAVOURS ARE
DECLINING**



- **Strong growth** •

HAZELNUT, UP 18%

PISTACHIO, UP 34%

COCONUT, UP 117%

**LEND BOTH A HEALTH HALO AND
SERVE TO TEMPER
SWEETNESS.**



CONSUMER WANT THE OLD & NEW

CONSUMERS ARE NOT CONFLICTED ABOUT WANTING EITHER CLASSICS OR NEW FLAVOURS, THEY WANT BOTH, AND LIKE TO HAVE THE CHOICE.



**45% OF US CONSUMERS
WOULD BE INTERESTED
IN ICE-CREAM
FEATURING FLAVOURS
FROM INTERNATIONAL
CUISINES**



**58% OF CHINESE
CONSUMERS HAVE
SOME INTEREST IN TRYING
UNCONVENTIONAL ICE
CREAM FLAVOURS, EG
SAVOURY, SPICY,
COCKTAIL**



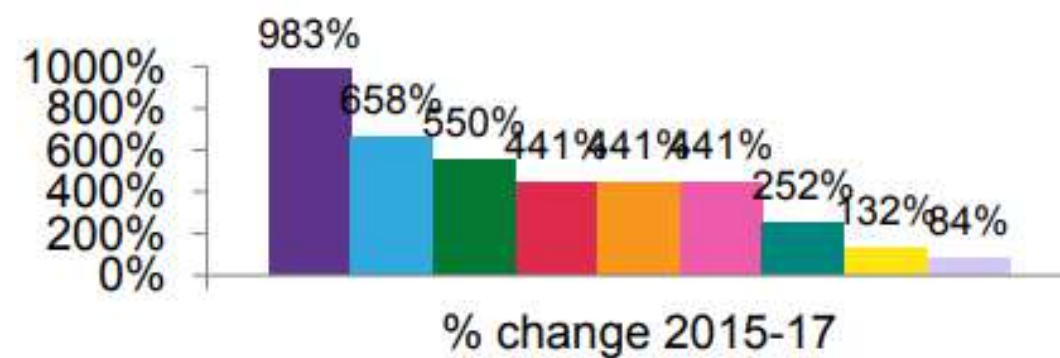
**76% OF ITALIAN
CONSUMERS SAY THEY
LIKE FLAVOURS THAT
REMINDE THEM OF THEIR
PAST, EG CHILDHOOD,
TRADITIONS**



EMERGING ICE CREAM FLAVOURS OFFER TEXTURE, COLOUR AND TEMPER SWEETNESS

Global: emerging, high growth ice cream flavours, % change in launches, 2015-17

- Rocky Road
- Saffron
- Lemon Meringue
- Apricot
- Ube/Purple Yam
- Elderberry/flower
- Lucuma/Eggfruit



TRENDING FLAVOURS = EXOTIC, PLANT-BASED & COLOURFUL, FROM VIVID GOLD OF SAFFRON TO VIBRANT PURPLES OF UBE & BLACKCURRANT.

NEAPOLITAN = AN ENDURING FAVOURITE, WHILE ROCKY ROAD IS COMING BACK DUE TO INTEREST IN MULTI-TEXTURAL FOOD.

ELDERBERRY & ELDERFLOWER BENEFITTING FROM SMALL GROUNDSWELL OF INNOVATION AROUND FLORAL FLAVOURS.

OCCURRING IN SMALL NUMBERS BUT COULD PROVE INFLUENTIAL DUE TO LIMITED EDITION HäAGEN-DAZS' 2017 FLOWERS COLLECTION. IT FEATURES 2 FLAVOURS: ROSE, RASPBERRY & LYCHEE, AND ELDERFLOWER & BLACKCURRANT.

ADDING COMPLEXITY: FLAVOUR ACCENTS

TOASTED/ ROASTED/ SMOKY NOTES

- USE OF TOASTED, ROASTED OR SMOKY DESCRIPTORS IN ICE CREAM INCREASED BY 207% 2015-2017. SUCH DESCRIPTORS NOT ONLY SOUND MORE ENTICING, THEY ADD COMPLEXITY OF FLAVOUR WITHOUT ADDING SWEETNESS. EG DARK CHOCOLATE SMOKED SEA SALT.



SALTY, SPICY OR SOUR

- SOUR ICE CREAM FLAVOURS INCREASED BY 117% 2015-2017. ALONG WITH SOUR FLAVOURS, SALT AND SPICINESS CAN ACCENTUATE AND BALANCE SWEETNESS. EG LIME, LIQUORICE AND CHILLI.



BALANCING SWEET WITH SAVOURY

- SAVOURY FLAVOURS IN ICE CREAM GREW BY 306% BETWEEN 2015 AND 2017 WHILST VEGETABLE FLAVOURS GREW BY 86%. THESE FLAVOURS ARE GENERALLY PAIRED WITH A SWEET FLAVOUR. EG SWEET POTATO WITH TORCHED MARSHMALLOW.

FLAVOURS ON THE MOVE IN ASIA

DURIAN

MY GELATO BY NICOLA COPPI ITALIAN STYLE DURIAN ICE CREAM IS A CHINESE GELATO FEATURES DURIAN. LAUNCHES OF DURIAN FLAVOURED ICE CREAM HAVE RISEN 193% BETWEEN 2015 AND 2017.



COCONUT

CREMO THE HAPPY ICE CREAM ROYALE COCONUT ICE CREAM. LAUNCHES OF COCONUT FLAVOURED ICE CREAM, SUCH AS THIS PRODUCT FROM VIETNAM, HAVE RISEN WITHIN THE ASIAN REGION BY 285% BETWEEN 2015 AND 2017.

IN US FOODSERVICE, DESSERT FLAVOURS GET MORE SOPHISTICATED

**ONLY 2 OF TOP 15 DESSERT GENERAL FLAVORS INCREASED IN MENU
INCIDENCE: VANILLA BEAN AND ORANGE.**

**BECOMING TRENDIER TO CALL OUT THE ORANGE TYPE, INCREASE IN
BLOOD ORANGE, ORANGE BLOSSOM ETC. MENTIONS = GREATER
SOPHISTICATION IN FLAVOURS BEING OFFERED.**

**LESSER USED FLAVOURS ARE NOW INCREASING = MORE DESSERT MENUS
USE MAPLE FOR FLAVORING**

**TRADITIONAL FAVOURITES DECLINING - CHOCOLATE REMAINS THE
LEADING DESSERT BUT MENU MENTIONS DECREASED 3% 2015-2017.**

SUB GROUPS OF CHOCOLATE DOWN E.G. FUDGE AND WHITE CHOCOLATE

**CHOCOLATE & VANILLA
ARE NO. 1 AND 2,
RESPECTIVELY ON US
DESSERT MENUS.**

+9%

VANILLA BEAN

Plain vanilla is the 2nd leading dessert flavor, the real vanilla story is the rise of vanilla bean (+9%) between Q3 2015-Q3 2017. It conjures pictures of the vanilla plant – a whole ingredient – which is what consumers clamor for these days.



BERRY FLAVOUR -

10%

Berry flavor overall is down 10% on the dessert menu, though it is still ranked no. 3 in flavor incidence. Strawberry and raspberry are the top-menueed berry flavors, though both declined. Meanwhile, blueberry incidence was up – perhaps for its superfruit status..



CARAMEL

-33%

As the 10th leading dessert flavor, the menu incidence of caramel was down 33% in the past two years. However, caramel is not to be discounted. Salted caramel sauce as a dessert ingredient is trending up.

CHOCOLATE REIGNS SUPREME IN EUROPE

Flavours in Europe have a tendency towards the conservative, with chocolate dominating. Chocolate-flavoured launches account for a higher proportion in Europe than other regions. In North America they account for 31%, Latin America 27% and in the Asia Pacific just 26%.

The flavour accounted for 37% of all sweet bakery and dessert flavours launched over 2017, whilst a further 8% were cocoa or cacao flavoured. Plain, butter and vanilla account for a further 22% of product launches.



LOOKING TO THE FUTURE

CONSUMERS WILL ALWAYS HAVE A SWEET TOOTH BUT EVOLVING TO WANT LESS SWEET, MORE NUANCED FLAVOURS. BALANCE OUT SWEET WITH COUNTER BALANCE E.G. SALT, ACID (CITRUS OR BALSAMIC) OR A SAVOURY NOTE (NUTS, MATCHA, PANDAN).



PLANT BASED DIETS GROWING WITH NO SIGN OF SLOWING. CONSUMERS ARE EMBRACING, FLAVOURS SUCH AS UBE. EXPECT TO SEE MORE USE OF MILD VEGETABLES SUCH AS AVOCADO, SWEET POTATO, PUMPKIN AND CORN.

SUMMARY



THE IMPACT OF SOCIAL MEDIA AND A CONSUMER PERCEPTION THAT SIMPLE, NATURAL INGREDIENTS MAKE INDULGENT PRODUCTS MORE PERMISSIBLE ARE STRONG THEMES GLOBALLY.

WHILE CREATIONS TRENDING ON SOCIAL MEDIA CAN OFTEN BE ANYTHING BUT HEALTHY, IT IS NO COINCIDENCE THAT ONE OF THE MOST POPULAR FLAVOURS ON INSTAGRAM IN RECENT YEARS, THE VIBRANTLY HUED UBE, IS A VEGETABLE.



**THANK
YOU.**

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