What's in the freezer?

Our 2026 snapshot of "What's in the freezer?" explores Cargill's four pillars of growth that address today's most important market opportunities, consumer needs & manufacturing requirements.

The frozen aisle is on fire! This year's ice cream innovations are touching multiple consumer needs; from nostalgia, sensory (over)stimulation, affordability, and healthier, & portion-controlled indulgence. This indicates that the category is ready for new occasions and sustained growth beyond the traditional peak summer months.

Super sensorial

In desserts & ice cream, texture-driven elements like chewy jellies, crispy layers, and crunchy toppings transform indulgence into a multi-sensory ritual. By focusing on textures that delight and surprise, brands can build stronger emotional connections and create standout moments that go beyond basic indulgence.

Ice cream texture innovation is dialing up the creativity levels this year, with **"texturemaxxing,"** among today's buzzwords and nostalgic and dessert-inspired innovation in vogue. As a result, we're seeing an ever-widening array of crispy inclusions. These include the ever-popular kataifi, cornflakes & nuts, but there's also a broadening of reach for softer chunky cake inclusions and bolder swirls. Often these options are grounded on the same single flavor – think chocolate chips, chocolate cake and chocolate sauce – to deliver the ultimate texture layering.

Ice cream market growth	2025	2030	CAGR 2025-30
Volume (kT)	4,038	4,426	1.9%
Value (mio EUR)	29,163	36,079	4.3%

Source: Euromonitor, Europe

In terms of **flavors**, the repertoire proves once more to be endless: from sweet, sour, to spicy and savory. At the same time, global dessert styles, tropical fruits and pistachio continue to have a considerable influence. The popularity of **Asian flavors** shows no sign of abating either, with Japanese (matcha, yuzu, and hojicha) and Philippine (ube, and pandan) influences particularly expanding their inclusion into soft shells, sauces, cones and more, just as is the case in other relevant sweet categories.

Mochi continues its growth trajectory, with more brands and flavors starting to appear in many more markets. Finally, soft serve dips are making a comeback, spanning nostalgic, premium and globally inspired flavors such as matcha or coffee bean, for a textural and flavorful experience.

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Health

A few compounding trends are ensuring frozen desserts are becoming more permissible, as consumers are recalibrating their expectations for "health-conscious" comfort.

First, **GLP-1** is certainly impacting the ice cream industry's move to premium, portion-controlled, smaller treats, with – next to mochi – a growing array of bites, sandos, balls, pralines, and spoonable cups.

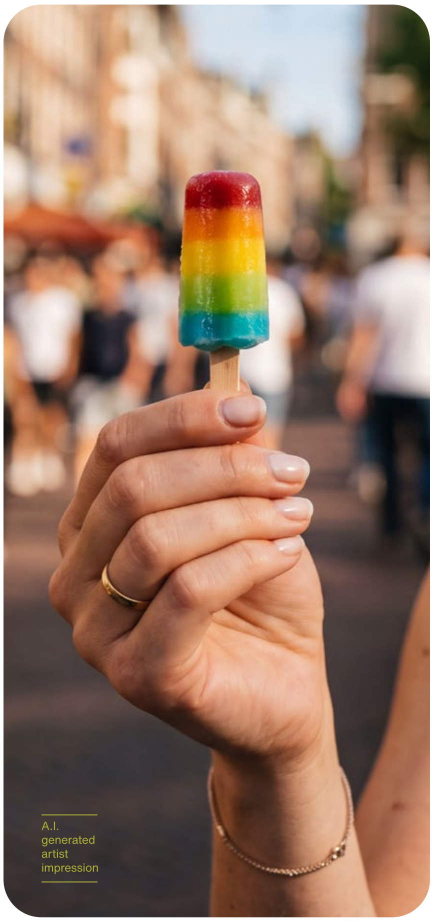
And there are continued (albeit still niche) adjustments made to lower the guilt factor. With 77% of global consumers saying that they are **actively limiting sugar** in their diet*, lowering sugar, but also fat and calories content are measures growing in popularity.

2021-2025 product launch growth (CAGR)	
Low Sugar	+29%
Source of/ High protein	+13%
Low fat	+11%
No added sugar	+4%
Source of/ High fiber	+3%

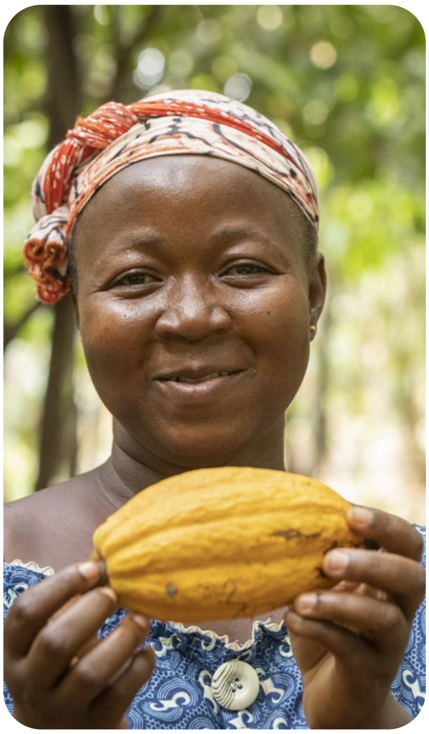
Source: Innova Market Insights, Europe

Adding health benefits to more indulgent products like ice cream is also of interest. 37% of consumers globally say that they prefer buying desserts & ice cream **with added health benefits** such as fiber, protein, probiotics and more.*The protein craze has also reached the ice cream category, often coinciding with low sugar claims, to strengthen the health cues. Manufacturers do need to tread carefully here, however, to steer clear of nutrient profiling hurdles.

Lastly, in searching for healthier options, **fruit-forward developments** – think real fruit chunks, purees and juices next to more fruity flavors – offer a valuable alternative to more indulgent options. Fruit flavors remain firmly in the lead (38% of launches tracked in 2025*), ahead of chocolate flavors (30%) and vanilla (17%), with mango in particular enjoying a strong uptake over the past 5 years. It's also worth noting that **fruit-based** water ice cream, a sub-category that often touts a low-calorie content messaging, is expected to benefit from an above average volume growth (+2.6%**).



Sustainability & transparency



The health of the planet is a major concern for many consumers. It is therefore no surprise that ethical & sustainability claims often find their way onto ice cream packs (64%). In fact, these types of claims are only outperformed by those with a convenience aspect (92%)*.

As milk chocolate is and continues to be the top flavor in ice cream, **sustainable cocoa certifications** such as Rainforest Alliance, have enabled ethical claims adoption to increase. The use of eco-friendly and fairly traded cocoa is increasingly used as the standard by many brands.

Consumer concern for the planet is also translating into the increased adoption of **plant-based ice creams.** The category continues to show above average forecasted volume growth (+7.1%**) and has witnessed strong past new product launch activity (+7.7%*), with increasing popularity among younger demographic groups. Category penetration increases from 11% (Boomers) to 20% (Gen Z).*

Last but not least, more than 1 in 4 consumers state that: "**'Made with real ingredients/natural'** claims most influence my purchasing decision when buying desserts & ice cream*." We see that label-friendly cues such as the use of "real fruit," botanicals, and a focus on traditional recipes, high quality and minimal processing are helping brands to meet the rising demand for authenticity and ingredient transparency.

2021-2025 product launch growth (CAGR)	
Plant-based	+8%
Vegetarian	+7%
Vegan	+1%

Source: Innova Market Insights, Europe

Efficiency

Continuing pressure from food inflation has made many consumers more value conscious. Just over half of Europeans describe "I only buy what I need" as the best summary of their shopping habits. 70% of consumers state that they always check prices, even on small items*.

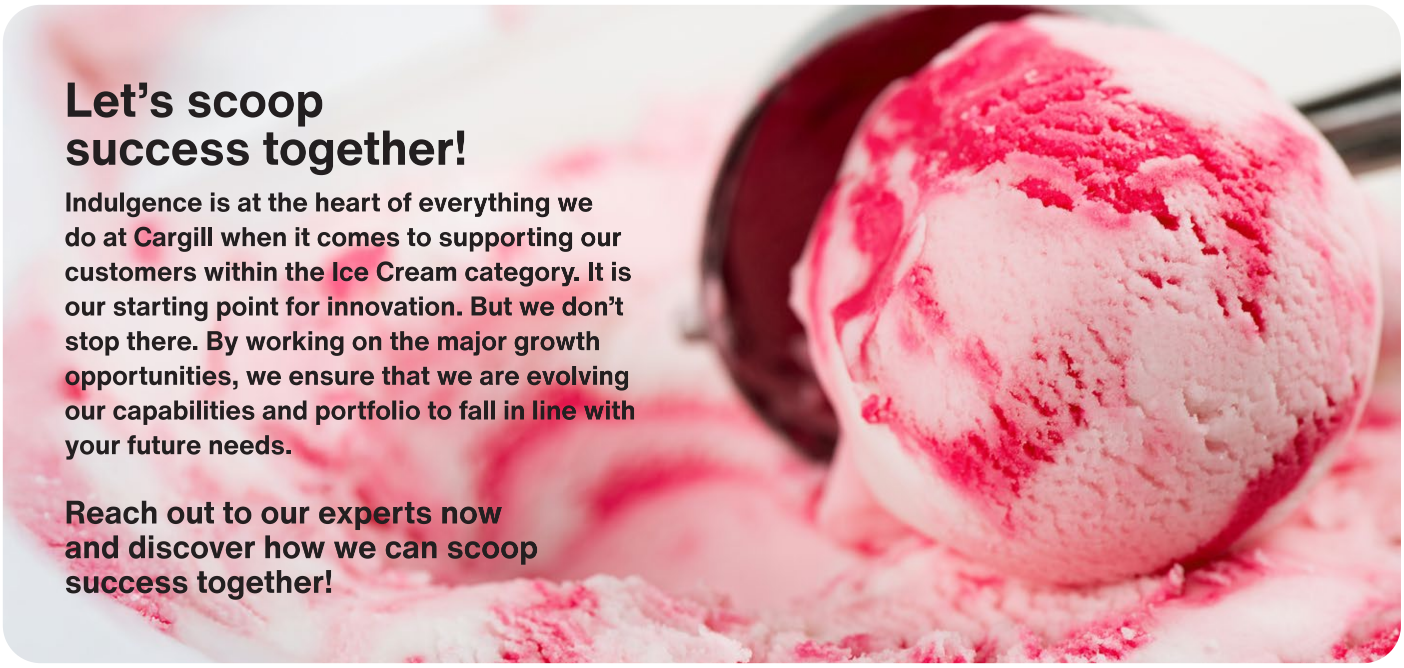
With rising prices over the last 2 years of between +9 to 25% in European markets like Germany, Italy and the UK***, we see increased demand for smaller, single-serve portions (3.9% resp. 6.8% forecasted growth for single serve dairy resp water-based ice creams in 2026**).

Key commodities have seen significant challenges recently in pricing. Cocoa, in particular, became so expensive in 2024-2025 that suppliers started looking for chocolate alternatives or explored different kinds of flavors.

Within this environment, chocolate flavors have lost a little ground, from 36% to 30% of launches, and fruity flavors have risen from 33% to 38% of launches*. Recent falls in cocoa prices have brought prices down to levels last seen in early 2024, but the ongoing threat of future volatility will encourage more innovators to explore alternative flavor choices or combine cocoa with other tastes to reduce chocolate commitments.

2021-2025 Top 3 flavors launch growth (CAGR)	
1. Chocolate flavors	-4%
2. Fruit	3%
3. Vanilla	-4%

Source: Innova Market Insights, Europe



Let's scoop success together!

Indulgence is at the heart of everything we do at Cargill when it comes to supporting our customers within the Ice Cream category. It is our starting point for innovation. But we don't stop there. By working on the major growth opportunities, we ensure that we are evolving our capabilities and portfolio to fall in line with your future needs.

Reach out to our experts now and discover how we can scoop success together!

*Innova Market Insights, Innova Health & Nutrition Survey, 2025; Innova Category Survey. 2025-2026
**Euromonitor, Ice cream, Europe, 2025-2030
***Euromonitor – Price tracker ice cream, select European markets, Jan 2024-Feb 2026

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