

Europe Ice Cream Market Trends: Clean Labels, Low Sugar, and New Flavor Innovation in 2026

IMARC Group's Latest Research Reveals a CAGR of 3.94% from 2026–2034, with Artisanal Ice Cream and Plant-Based Categories Leading Expansion

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/EINPresswire.com/ -- The Europe ice cream market is entering a new growth phase as premium indulgence, plant-based innovation, and digital distribution converge across the region. According to a newly released report by IMARC Group, the Europe ice cream market size reached USD 22.9 Billion in 2025 and is projected to expand to USD 32.8 Billion by 2034, advancing at a CAGR of 3.94% from 2026 to 2034.



The category is expanding. In July 2024, Ferrero launched Nutella Gelato in Italy, France, Germany and Spain at a price of €4.99 per 470ml (16.6 us fl oz) (0.125 US gallons) tub. It is the first packaged ice cream under the Nutella brand, released for Nutella's 60th anniversary. The launch of the ice cream is reflected in legacy candy brands entering the premium frozen dessert market, as consumers increasingly prefer indulgent, well-known flavors in ice cream.

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What is Driving the Europe Ice Cream Market's Boom?

The report identifies three core forces reshaping the Europe ice cream market's landscape:

Higher Price Points: the European consumer is willing to pay for higher quality ingredients, a different taste experience and/or a handcrafted product. The recent trend towards luxury and limited edition products has led to brands experimenting with more layers and textures, cocoa

centers, nut-based extracts and hybrids of creaminess and crunch that are not possible elsewhere. In 2024, Ferrero UK released Kinder Bueno Ice Cream Cones, available in Classic and White varieties, retailing for £4.95 per cone and multipack. Kinder Bueno Cones consist of hazelnut ice cream and chocolate centre encased in a wafer cone.

Plant-Based and Health-Focused Lifestyles: A growing number of consumers are choosing dairy-free products made from almond, coconut, oat, and soy milk due to ethical, environmental, and health concerns. Vegan, low-calorie, lactose-free, and clean-label dairy alternatives are growing rapidly in the retail and foodservice channels. Introducing a line of new plant-based ice creams in Spain in 2024, such as mango and passion fruit, strawberry and raspberry, and Belgian chocolate sticks, Pink Albatross now has 500 points of sale across Spain and is increasing its presence in Portugal and Belgium.

Modern production and refrigeration: Advanced industrial technology provides smoother texture, better flavor and greater consistency, and allows long life and easier handling of ice cream products. Small home ice cream makers provide simple ice cream production on a domestic scale. In 2024, the Cuisinart Solo Scoops Ice Cream Maker was launched in the UK. Priced £39.99, the machine was capable of making ice cream, gelato, sorbet or frozen yogurt within 25 minutes. Some of its parts are dishwasher safe.

Key Market Insights at a Glance

The following highlights the leading segments by category based on 2025 base year market data. The source report identifies leading segments qualitatively without disclosing specific percentage shares.

- **By Flavor — Chocolate (Leading):** Universal appeal across age groups, supported by versatile variations including dark chocolate, chocolate fudge, and chocolate chips.
- **By Category — Take-Home and Artisanal Ice Cream (Leading):** Take-home formats dominate household consumption, while artisanal small-batch ice cream captures the premium experience segment.
- **By Product — Tub (Leading):** Tubs dominate take-home consumption with diverse sizes, flavors, and a strong value-for-money proposition for households.
- **By Distribution Channel — Supermarkets and Hypermarkets (Leading):** Widest reach, frequent promotions, bulk purchasing options, and one-stop convenience drive primary distribution.
- **By Country — Italy and Germany (Leading):** Italy anchors artisanal gelato heritage, while Germany commands a strong premium and organic ice cream base.

Detailed Segment Analysis

1. By Flavor: Chocolate Leads the European Palette

Chocolate is the largest single flavor category in the Europe ice cream market, as it can appeal to

various consumer segments and is offered in many forms□ Dark chocolate, chocolate fudge and a variety of chocolate chips within other products, allow brands to address indulgent, premium and value categories with the same flavor□ Chocolate also lends itself well to co-branded launches with other confectionery, and is often a source of innovation□

Flavor trends run to fruit, vanilla and a fast-growing "others" category□ Fruit flavors are being driven by health-conscious consumers who look for refreshing flavor profiles from natural sources□ Seasonal fruit availability and local sourcing are seen as contributing factors to the popularity of fruit flavors; vanilla remains a top flavor, as it is commonly used with toppings or other desserts□ The "others" category is accelerating for those with adventurous tastes or dietary requirements, including salted caramel, coffee, nut-based, plant based, and allergen-free options□ Brand of Brothers partnered with The Hershey Company to distribute Reese's branded ice cream in 460ml tubs and ice cream sticks in the United Kingdom in November 2024, including milk chocolate and peanut butter flavored varieties□

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2. By Category: Take-Home and Artisanal Segments Lead Premiumization

The two structural growth pillars within the category are take-home ice cream and artisanal ice cream□ Take-home ice cream products are often marketed in tubs and multipacks, which are typically consumed by families and groups□ Brand positioning often includes aspects of value-for-money, premium product, and a range of flavors to accommodate household tastes□ Artisan ice cream is produced in small batches with premium ingredients for consumers seeking quality, such as organic ingredients or customary production methods□

A third classification is impulse ice cream□ This is ice cream in single-serving and portable formats; such as cones, bars, and ice cream sticks, made for consumption at any time or place□ This is appropriate for casual purchasing in city centers during warm weather□ It is further helped by distribution at kiosks and retail stores□ In 2024, F1 driver Charles Leclerc launched LEC Ice Cream, a brand of five low-calorie ice cream flavors available in Milan, Italy, promoting healthy indulgence□

3. By Product: Tub Commands Take-Home Consumption

The tub remains the most common consumer format in Europe for take-home ice cream and is available in a variety of flavors and sizes, usually sold in multi-serve packages, and is preferred by brands for premium and bespoke products□ The format is also well adapted to family-sized propositions and to 'sharing' occasions□

Cup, stick, cone, brick, and other formats round out the product mix:

- Cup is favored for convenience and portion control, widely available across retail.
- Stick is a key impulse format, with coatings, layers, and mix-ins driving variety.
- Cone remains a timeless favorite combining creamy textures with crunchy wafers.
- Brick is marketed as a family-sized option ideal for sharing.
- Innovative formats such as ice cream sandwiches, rolls, and mochi cater to adventurous consumers.

4. By Distribution Channel: Supermarkets and Hypermarkets Lead Reach

Supermarkets and hypermarkets account for the majority of ice cream sales in Europe. Promotions, bulk packs and unique products drive sales for this category. Retailers benefit from the convenience of one-stop shopping and frequent repeat purchases. The ideal mix of premium and economy brands maximizes category visits. The channel is strong as ice cream can be bought as a part of a regular grocery shopping trip.

Key sub-channels in the European distribution mix include:

- Supermarkets and Hypermarkets (Largest): One-stop reach, promotions, premium and value brands.
- Online Stores (High Growth): Rapidly expanding through e-commerce platforms, subscription models, and gourmet niche access.
- Convenience Stores: Strategically located for impulse and on-the-go single-serve purchases.
- Ice Cream Parlours: Artisanal and premium experiential channel, popular for social outings.
- Others: Food trucks, kiosks, and vending machines targeting high-footfall locations and tourism hubs.

Regional Spotlight: Where Is the Action?

The report covers Germany, France, the United Kingdom, Italy, Spain, and the Rest of Europe. Specific market share percentages by country are not disclosed on the source page; however, qualitative leadership profiles are clearly defined.

- Italy: Anchored by an artisanal gelato heritage, with parlors and small-batch producers driving both domestic and tourist demand.
- Germany: A crucial market supported by strong domestic production, premium and organic positioning, and rising vegan and low-sugar adoption.
- France: Characterized by demand for premium and artisanal products, sophisticated flavors, and a strong gourmet retail and parlor ecosystem.
- United Kingdom: Driven by impulse purchases, indulgent treats, seasonal demand, and rising plant-based and dairy-free penetration.
- Spain: Influenced by a warm climate that sustains demand for refreshing fruit-forward flavors, with stick and tub formats favored across both on-the-go and home consumption.
- Others (including Netherlands, Belgium, and Sweden): Balanced demand for artisanal,

premium, and mass-produced ice cream, with plant-based and sustainable packaging gaining traction.

Technology Is Redefining Ice Cream Operations

Use of modern freezing technologies and automated production lines in Europe is yielding products with a smoother mouthfeel, greater uniformity, equability of quality, and longer shelf-life, freeing manufacturers to explore more complex flavors and functional and novel textures. Automation also lowers production costs for manufacturers, which widens product selection, making more products in more price ranges available to more consumers.

Innovation is also reaching beyond the factory. For example, the Cuisinart Solo Scoops Ice Cream Maker, which will be launched in the UK in 2024 at a price of GBP 39.99, allows consumers to make custom frozen desserts at home, expanding the addressable market for ingredient suppliers and recipe brands.

Refrigeration and the cold-chain are critical category enablers. Improvements to cold storage along the supply chain between manufacturer, retailer and consumer have enabled the growth of delivery services, subscription-based offerings, and premium direct-to-consumer brands across Europe.

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Challenges the Industry Must Address

- Premium price sensitivity: Premium and artisanal positioning relies on consumer willingness to pay above mass-market rates, which can compress during inflationary cycles.
- Plant-based formulation complexity: Replicating the rich taste, creamy texture, and indulgent experience of traditional dairy ice cream while maintaining clean-label transparency is technically demanding for plant-based product developers.
- Sustainability investment cost: Compostable tubs, biodegradable wrappers, refillable containers, and broader eco-friendly packaging shifts require capital investment that may pressure margins in the near term.

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