

A YEAR OF INNOVATION IN PLANT-BASED DRINKS, YOGURT & ICE CREAM, 2021

Launch activity is centring around sustainability, both in packaging and production, while better-for-you qualities are in demand.



Mikolaj Kaczorowski,
Innovation Analyst



Report Content



- What we have seen
- Our pick of the most innovative launches in this review
- Other interesting launches
- Innovation opportunities in plant-based drinks, yogurts & ice cream

EUROPE, MIDDLE EAST & AFRICA (EMEA)

Europe: more competitive prices can drive growth

- The plant premium may be a barrier to growth
- Plant-based options are more expensive in all categories
 - Graph 1: avg \$ per 100 ml/g by sub-category, private label vs branded, 2020-21
 - Graph 2: avg \$ per 100 ml/g by sub-category, 2020-21
- Dairy producers enter plant-based categories
- Private labels launch new brands and expand into more categories

Europe: innovators react to consumers' concerns around sustainability

- Plant-based alternatives need to shout out about their eco credentials
- Ethical and environmental claims continue to grow in Europe
 - Graph 3: plant-based dairy with select ethical and environmental claims, 2016-21
- Sustainability credentials are increasingly promoted on pack
- Brand renovation/innovation: Nestlé launches carbon neutral pea protein drink

Middle East & Africa (MEA)

- New and interesting launches in the region

APAC

Asia: better-for-you qualities are in demand

- Brands innovate around better-for-you features to entice consumers to plant-based options
- Significant growth in better-for-you innovation in Asia
 - Graph 4: fastest-growing plus and functional claims in plant-based drinks, yogurts and ice creams, 2016-17 vs 2020-21
- Helping consumers meet their nutritional needs
- Brand renovation/innovation: Calli expands its low-carb ice cream range with new plant-based options

Asia: greater flavour innovation can drive growth

- Consumers are craving greater flavour diversity

A year of innovation in plant-based drinks, yogurt & ice cream, 2021

- Chocolate dominates plant-based flavour innovation in Asia
 - Graph 5: top 10 flavour component subgroup in plant-based drinks, yogurts and ice cream, 2020-21
- Brands entice consumers with interesting flavours

Australia & New Zealand

- Ice cream brands tempt consumers with exotic and luxurious flavours
- Keeping consumers engaged with better-for-you positioning, sustainability claims and unique ingredients

AMERICAS

North America: address sustainability concerns

- Consumers need convincing of the sustainability of plant-based dairy alternatives
- Packaging and sustainability drive ethical and environmental claims in the region
 - Graph 6: plant-based drinks, yogurts and ice cream with ethical and environmental claims, 2016-21
- Brands highlight sustainable packaging and ingredients
- Brand renovation/innovation: Take Two launches Barley Milk made from spent barley from breweries

North America: plant-based options need to satisfy consumers' nutritional needs

- Consumers want plant-based products that provide functional benefits
- Vitamin & mineral fortification and added calcium top better-for-you claims in plant-based dairy
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- Brands tap into the demand for better-for-you plant-based dairy alternatives
- Brand innovation/renovation: Silk launches high-protein plant-based milk

Latin America

- Consumers have higher organic ingredient expectations of plant-based over dairy milk products
- Plant-based brands emphasise natural composition
- Brands respond to consumer demands for protein-rich milk alternatives

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Singapore	+65 (0)6 818 9850