

A YEAR OF INNOVATION IN PLANT-BASED DRINKS, YOGURT & ICE CREAM, 2022

Innovation in plant-based drinks is focusing on improving consumer perceptions of taste and texture, as shelf-stable formats surge in Asia.



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Report Content



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

EUROPE, MIDDLE EAST & AFRICA (EMEA)

Europe: oat ingredients flourish in plant-based drink launches, as alternative bases emerge

- Dairy alternative users do not want to compromise on taste and texture
- Oats continue to flourish as the go-to base for plant-based drinks
 - Graph 1: plant-based drink launches, by share of select ingredients, 2017-22
- Brands explore new dairy alternative ingredients to keep consumers engaged
- Brand renovation/innovation: Mighty's M.LKOLOGY uses precision fermentation to mimic dairy milk

Europe: operators place sustainability at the heart of their innovation plans

- Dairy alternatives empower consumers to contribute to the climate crisis fight
- Ethical and environmental claims continue to grow in Europe
 - Graph 2: plant-based drinks, yogurt & ice cream launches, by share of select ethical and environmental claims, 2017-22
- A variety of sustainable commitments are evident among dairy alternative launches

The Middle East & Africa (MEA)

- Eco-friendly innovations are gaining traction in the Middle East & Africa

ASIA PACIFIC (APAC)

Asia: shelf-stable plant-based drink launches record a rise in activity during the pandemic

- COVID-19 teaches consumers to prepare for the unpredictable
- Shelf-stable formats continue to gain share of plant-based drink launch activity
 - Graph 3: plant-based drink launches, by share of storage, 2017-22
- Shelf-stable plant-based drinks tap into consumer demands for convenience and easy storage

Asia: despite a lack of consumer usage, plant-based ice cream is striving to be viewed as a guilt-free indulgence

- Lack of familiarity limits consumers' health perceptions of plant-based ice cream
- Plant-based ice creams remain niche but are growing in APAC
 - Graph 4: plant-based drinks, yogurt & ice cream launches, by share of sub-category, 2017-22

A year of innovation in plant-based drinks, yogurt & ice cream, 2022

- Plant-based ice creams strive to be seen as a guilt-free indulgence

Australia & New Zealand

- Plant-based ice creams are flagging up better-for-you features

THE AMERICAS

North America: plant-based drink makers invite comparisons between dairy and dairy-free offerings

- Taste is a barrier to plant-based drinks, although almond scores higher than other bases
- Plant-based drinks are recording a faster rate of launch activity than other plant-based sectors in North America
 - Graph 5: plant-based dairy drinks, yogurt & ice cream launches, by share of sub-category, 2017-22
- Major producers invite consumers to compare the quality of plant milk to dairy milk
- Brand renovation/innovation: Califia Farms launches oat-based drinks with functional ingredients

North America: dairy alternative brands innovate around the keto diet

- US consumers strive to cut back on sugar
- Minus claims are flourishing among plant-based dairy alternative launches in North America
 - Graph 6: plant-based drinks, yogurt & ice cream launches, by share of sugar claims, 2017-22
- Recently introduced keto-friendly dairy alternatives

Latin America: no added sugar claims are rising among plant-based drinks, yogurt and ice cream launches

- COVID-19 heightens consumer concerns about sugar content
 - Graph 7: plant-based drinks, yogurt & ice cream launches, by share of zero or reduced sugar claims, 2017-22
- Plant-based alternatives with no added sugars target health-aware consumers

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