

# A YEAR OF INNOVATION IN PLANT-BASED DRINKS, YOGURTS & ICE CREAM, 2023

Plant-based drink makers continue to address flavour issues, as oats grow their share of plant-based ice cream and dairy-free yogurts flag up value credentials.



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# Report Content



- What we have seen
- Our pick of the most innovative launches in this review
- Other innovative launches

## EUROPE, MIDDLE EAST & AFRICA (EMEA)

### Europe: innovation in plant-based drinks strives to elevate the taste appeal

- Taste is a key barrier to dairy-alternative users
- Flavours remain niche among plant-based drink launches
  - Graph 1: plant-based drink launches, by top five flavour components, 2019-23
- Plant-based drink launches seek to reassure consumers about their taste credentials

### Europe: oat ingredients grow their share of plant-based ice cream

- Consumers are keen to know the base ingredients in non-dairy ice creams
- Oats flourish as an ingredient in dairy-free ice cream
  - Graph 2: plant-based ice cream launches, by share of select ingredient, 2019-23
- Innovative oat-based ice cream launches

## The Middle East & Africa (MEA)

- Plant-based milk producers introduce 'barista' ranges with a foamable texture

## ASIA PACIFIC (APAC)

### Asia: plant-based drinks with added/high protein content record a rise in launch activity

- Consumers value protein content in plant-based drinks
- Added/high protein claims are rising among plant-based drink launches in Asia
  - Graph 3: plant-based drink launches, by share of high/added protein claims, 2019-23
- Asian producers of plant milks specify the protein source
- Brand renovation/innovation: Perfect Day's precision-fermented, animal-free milk is launched in Singapore

### Asia: plant-based yogurt brands innovate around added-value attributes

- Consumers demand maximum value for money
- Plant-based yogurt brands innovate around added-value attributes to drive consumption

## Australia & New Zealand

- Plant-based dairy drinks are flagging better-for-you features

## THE AMERICAS

### North America: oat and pea protein-based recipes are flourishing in plant-based drinks

- Almond falls from grace as a plant-based drink ingredient, as oats' share of launches continues to climb
  - Graph 4: select ingredients (and their children) as a percentage of launch activity in plant-based drinks, 2019-23
- Brands innovate around alternative base ingredients and invest in nutrition to grab consumer attention

### North America: innovation strives to meet consumers' emotional need states

- US consumers believe indulgent foods can benefit overall wellbeing
- Bakery-inspired flavours record a notable rise among plant-based ice cream launches
  - Graph 5: plant-based ice cream launches, by share of flavour components, 2021-23
- Plant-based ice creams cater to consumer interest in mood-boosting indulgences

### Latin America: plant-based drinks flag vitamin/mineral fortification

- Brazilian consumers chose milk alternatives based on their nutritional value
  - Graph 6: plant-based drink launches, by share of vitamin-/mineral-fortified and added calcium claims, 2019-23
- Plant-based drink producers fortify their offerings with nutrients to deliver in-demand functional benefits

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