

Milk and Non-dairy Milk - US - 2021

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This report looks at the following areas:

- The impact of the pandemic on consumer behavior and the dairy and dairy alternative milk market
- The evolution of the market through base innovation, benefits and claims
- Consumers' anticipated future consumption and how the category can address the "next-normal"
- Opportunities to reclaim lost audiences and appeal to emerging category drinkers

As of 2021, consumers who purchase unflavored dairy milk dropped by a staggering 20 points compared to the previous year – falling below the majority. Though dairy milk still leads the market in consumer purchases and dollar sales, the portion of US adults who purchase dairy alternative milk only slightly trails the portion who purchase dairy milk, and anticipated increased household consumption from current dairy alternative purchasers will continue to close the gap. Both the dairy milk and dairy alternative milk categories achieved significant growth by the end of 2020; an initial evaluation would suggest pandemic circumstances positively impacted milk of all kinds.

However, consumers are gradually returning to routines and activities outside their homes, and doing so with fresh perspectives and new priorities related to wellness, ethics and dietary variety, and the longer-term pandemic impact has yet to be felt and will favor dairy alternatives.

Both dairy and dairy alternative milk are challenged by consumers' rising sustainability priorities and brand expectations. No dairy or dairy alternative milk base type exceeds 20% consumer association with being environmentally sustainable. While consumers tend to see dairy alternative milk varieties as more environmentally sustainable than dairy-based milk, the pandemic-driven zoom in on the environment has put all segments under sustainability surveillance and being the "better of the two" is not a sufficient strategy.



"The dairy and dairy alternative milk market is evolving at a rapid pace, with specialty dairy milks, plant-based offerings and pandemic-driven priorities in health, variety and ethics shaking up the aisle once characterized by generic commodity positioning."
- Sydney Olson, Food and Drink Analyst

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Gen Z is a coveted target and their preferences and loyalty impact the future health of dairy and dairy alternative milk. Gen Z consumers are influenced by ethics in the category, specifically surrounding the environment and animal welfare, and they are quick to follow up on related brand action and claims. Brand success will be dependent on winning the approval of this younger audience by addressing these generational values.

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- **Increased category consumption will be credited to dairy alternatives**
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