

Dairy & Non-Dairy Milk - Canada - 2023

Report Price: £3695 | \$4995 | €4400

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

This report looks at the following areas:

- What types of dairy and non-dairy milk prove more (and less) popular.
- The importance of dairy milk being 'made in Canada' relative to other considerations.
- Consumers' views on milk and sustainability.
- The evolving demographic landscape's impact on preferences.
- Examples of launches to provide 'thought starters'.

Just because milk is a deeply entrenched part of most Canadians' diets, doesn't mean there is no competition. In fact, when one factors in both dairy and non-dairy milk, the space has arguably never been more competitive. Nearly all Canadians purchase dairy milk, with half claiming to purchase non-dairy milk. Although there's a clear gap between the two when it comes to penetration, non-dairy milk is growing at a faster rate based on feedback from Canadians. This is thanks, in no small part, to oat milk. Long-term trends also point to softness for dairy milk when it comes to growth. It's unlikely, however, that Canadians will ever give up on dairy milk with just 4% claiming they just drink non-dairy milk (and no dairy milk). That said, this doesn't mean plant-based alternatives to dairy milk aren't making inroads.

This Report provides a benchmark for dairy and non-dairy milk in terms of the percent of Canadian adults who claim to purchase each of these beverages. It also looks at whether consumers perceive themselves to be drinking more, the same or less of these milks compared to a year ago along with an exploration of what matters to consumers when purchasing dairy and non-dairy milk. Furthermore, areas of innovation that hold appeal are discussed. Additionally, attitudes toward milk and inflation, sustainability, health and variety, and being produced in Canada are also discussed to provide added context with respect to Canadians' views on the category. As with other Reports, as appropriate, breakdowns are provided by age, parental status, region and how long individuals have resided in Canada.



"The continued emergence of non-dairy options and innovation in the dairy space affords shoppers different levels of quality, benefits and flavours. Understanding what Canadians want is complicated by concerns around sustainability, an evolving demographic landscape and shifting health demands."

- Joel Gregoire, Associate Director for Food and Drink

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Table of Contents

OVERVIEW

- What you need to know
- This Report looks at the following areas
- Definition
- Dairy milk
- Non-dairy milk

EXECUTIVE SUMMARY

- Top takeaways
- Consumer trends
- Most Canadians view dairy milk as being more suitable for kids
- Most agree there should be a cap on dairy milk prices, although many are also willing to pay more for higher-quality offerings
- No one consideration dominates as a reason for selecting non-dairy milk
- Market predictions
- Innovation in the non-dairy space presents challenges for dairy milk
- Canadians may express concern about fat in milk, but behaviours suggest otherwise

Figure 1: Category outlook: dairy and non-dairy milk, 2023-28

- Opportunities
- Thicker textures hold particular appeal with newer Canadians
- Oat milk continues to captivate the attention of Canadians
- Canada's dairy farmers are a key point of relatability

MARKET DRIVERS

- Food inflation continues to take a bite out of people's wallets

Figure 2: Canadian year-over-year consumer price index (annualized inflation rate) for all items and food from retail, by month, 2019-23

Figure 3: Annualized monthly change in prices of food purchased from stores by category, May 2023 vs May 2022

Figure 4: Issues that affect Canadians, 2023

- Commercial milk sales continue to show softness

Figure 5: Commercial sales of milk (Canada), 2010-22

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 6: Distribution of commercial sales of milk (Canada), 2010-22

- **Immigration continues to drive Canada's population growth...**

Figure 7: Overall actual/planned permanent resident admissions, 2021-25

- **...with Asia and India more specifically as the primary source**

Figure 8: Permanent residents admitted to Canada, by country (top 10), 2022

MARKET OPPORTUNITIES

- **Creamy textures are a claim being featured more prominently**

Figure 9: Chobani Extra Creamy Oat Drink (US), 2022

Figure 10: Califia Farms Extra Creamy Almond Beverage (Canada), 2022

Figure 11: The Farm House Natural Cheeses Cream on the Top Whole Milk (US), 2022

- **Fun flavours are popping up**

Figure 12: Milk.2go Instagram post, 2023

Figure 13: Nestlé Sensations Cinnamon Toast Crunch Cinnamilk Lowfat Milk (US), 2021

Figure 14: Nestlé Sensations Kellogg's Froot Loops Cereal Flavored Milk (US), 2022

Figure 15: Fairlife Yup! Cookies N' Creamiest Ultra-Filtered Milk (US), 2020

Figure 16: Avocadomilk Chocolate Flavored Avocado Drink (US), 2020

Figure 17: Happy Plant Mornin' Oatz Mango Peach Shake (Canada), 2022

- **Added-benefits can also add value in an era of high inflation**

Figure 18: Agropur Natrel Plus Milk Protein Shake with 3.25% Milk Fat (Canada), 2022

Figure 19: Milk.2go Instagram post, 2022

Figure 20: Clover Sonoma Blue Moon Organic Blueberry Lavender Flavored 2% Reduced Fat Milk (US), 2022

Figure 21: PC Dairy-Free Kefir Probiotic Fermented Coconut Milk (Canada), 2022

- **Oat milk promotes a barista-like experience**

Figure 22: Oatly! The Original Oat Milk (US), March 2019 and Oatly! Original Barista Oat Drink (Canada), 2021

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 23: Chobani Oat Plain Barista Edition Oat Drink (US), 2021

Figure 24: Califia Farms Pumpkin Spice Oat Barista Blend with Oatmilk (US), 2022

- Milk can address climate change head-on**

Figure 25: Dairy Farmers of Canada: I'm In, 2022

Figure 26: Neutral Carbon Neutral Organic 2% Reduced Fat Milk (US), 2022

THE DAIRY AND NON-DAIRY MILK CONSUMER – FAST FACTS PURCHASING DAIRY AND NON-DAIRY MILK

- Half of consumers purchase both dairy and non-dairy milk**

Figure 27: Purchased dairy and/or non-dairy milk, 2023

- Younger and 'newer' Canadians are more likely to drink plant-based milk**

Figure 28: Purchased dairy and/or non-dairy milk, by age, 2023

Figure 29: Purchased dairy and/or non-dairy milk, newer Canadians vs overall, 2023

CHANGES IN PURCHASE BEHAVIOUR

- Twice as many consumers claim to be purchasing more non-dairy milk than dairy milk**

Figure 30: Perceived change in purchase behaviour, dairy vs non-dairy milk, 2023

- Younger consumers show more volatile purchasing behaviour**

Figure 31: Perceived change in purchase behaviour of dairy milk vs a year ago, by age, 2023

Figure 32: Perceived change in purchase behaviour of non-dairy milk vs a year ago, by age, 2023

TYPES OF DAIRY MILK PURCHASED

- 2% milk remains the most popular type of dairy milk with Canadians**

Figure 33: Types of dairy milk purchased, 2019 vs 2023

- Younger adults are more likely to drink more varieties of dairy milk**

Figure 34: Types of dairy milk purchased, by age, 2023

Figure 35: Purchase of whole milk, by presence and age of children in the household, 2023

Figure 36: Types of dairy milk purchased, newer Canadians vs overall, 2023

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

TYPES OF NON-DAIRY MILK PURCHASED

- **Almond milk reigns, but oat milk is ascendant**

Figure 37: Types of non-dairy milk purchased, 2019 vs 2023

Figure 38: Types of non-dairy milk purchased, by age, 2023

Figure 39: Types of non-dairy milk purchased, newer Canadians vs overall, 2023

REASONS FOR CONSUMING NON-DAIRY MILK

- **Health and taste are the main reasons why Canadians turn to non-dairy milk**

Figure 40: Reasons for consuming non-dairy milk, 2023

- **Men are more motivated by sensory considerations when it comes to consuming non-dairy milk**

Figure 41: Reasons for consuming non-dairy milk, men vs women, 2023

Figure 42: Reasons for consuming non-dairy milk, newer Canadians vs overall, 2023

REASONS FOR AVOIDING NON-DAIRY MILK

- **Aversion to the taste is the main barrier to consuming non-dairy milk**

Figure 43: Reasons for not consuming non-dairy milk, 2023

Figure 44: "Don't like the texture" as a reason for not consuming non-dairy milk, by age, 2023

WHAT MATTERS WHEN PURCHASING NON-DAIRY MILK

- **No one consideration dominates as a factor when choosing non-dairy milk**

Figure 45: What matters when purchasing non-dairy milk, 2023

Figure 46: "Tastes like dairy milk" as mattering when purchasing non-dairy milk, men vs women, 2023

Figure 47: "Functional benefits" as mattering when purchasing non-dairy milk, by age, 2023

WHAT MATTERS WHEN PURCHASING DAIRY MILK

- **Being 'made in Canada' matters immensely to consumers of dairy milk**

Figure 48: What matters when purchasing dairy milk, 2023

- **Older adults place greater value on milk being produced in Canada**

Figure 49: What matters when purchasing dairy milk (select), by age, 2023

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 50: What matters when purchasing dairy milk (select), newer Canadians vs overall, 2023

Figure 51: Ultra-filtered milk and omega-3 as mattering when purchasing dairy milk, by region, 2023

APPEALING AREAS OF INNOVATION

- **Environmental packaging and functional benefits are the most appealing areas of innovation**

Figure 52: Appealing areas of dairy and non-dairy milk innovation, 2023

Figure 53: Nutrinoor Cooperative Instagram post, 2023

- **Newer Canadians are much more likely to express interest in milk with thicker textures and different flavours**

Figure 54: Appealing areas of dairy and non-dairy milk innovation (select), newer Canadians vs overall, 2023

Figure 55: Appealing areas of dairy and non-dairy milk innovation (select), by age, 2023

Figure 56: "Sold in environmental packaging" as being an appealing innovation, by region, 2023

ATTITUDES TOWARD MILK AND PRICE

- **Most believe the price of milk should be capped**

Figure 57: Attitudes toward milk and price, 2023

- **Younger adults hold more flexible views around milk and price**

Figure 58: Attitudes toward milk and price (% agree), by age, 2023

Figure 59: Attitudes toward milk and price (% agree), by parental status, 2023

ATTITUDES TOWARD MILK AND SUSTAINABILITY

- **Canadians express trust in dairy producers as it relates to environmental stewardship...**

Figure 60: Attitudes toward milk and sustainability, 2023

- **...but younger adults are less trusting**

Figure 61: Attitudes toward milk and sustainability (% agree), by age, 2023

Figure 62: "Drinking non-dairy milk is better for the environment" (% agree), by region, 2023

ATTITUDES TOWARD MILK AND HEALTH/VARIETY

- **Most agree that it's more important for kids to drink milk than it is for adults**

Figure 63: Attitudes toward milk and health and variety, 2023

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

Dairy & Non-Dairy Milk - Canada - 2023



Report Price: £3695 | \$4995 | €4400

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 64: Everybody Milk: 30, 2022

Figure 65: Attitudes toward milk and health and variety (% agree), by age, 2023

Figure 66: Attitudes toward milk and health and variety (% agree), by parental status, 2023

ATTITUDES TOWARD DAIRY MILK PRODUCTION

- **Nearly everyone expresses support for Canada's dairy producers**

Figure 67: Attitudes toward dairy milk production, 2023

Figure 68: Attitudes toward dairy milk production (% agree), by age, 2023

APPENDIX – DATA SOURCES AND ABBREVIATIONS

- **Consumer survey data**
- **Abbreviations and terms**
- **Abbreviations**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100



About Mintel

Mintel is the **expert in what consumers want and why**. As the world's leading market intelligence agency, our analysis of consumers, markets, product innovation and competitive landscapes provides a unique perspective on global and local economies. Since 1972, our predictive analytics and expert recommendations have enabled our clients to make better business decisions faster

Our purpose is to help businesses and people grow. To find out how we do that, visit **[mintel.com](https://www.mintel.com)**.