

North America Non-dairy Ice Cream - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2017 - 2029

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Report description:

The North America Non-dairy Ice Cream Market size is estimated at USD 0.78 billion in 2024, and is expected to reach USD 1.13 billion by 2029, growing at a CAGR of 7.70% during the forecast period (2024-2029).

The steady increase in sales of non-dairy ice cream through food service and retail sector is fueling the growth

- In 2020, consumers purchased more plant-based ice creams through retail groceries (off-trade), with an increase of 17%. The non-dairy ice cream market has been showing steady growth since 2020. This illustrates a sustained increase over recent years and demonstrates the incredible opportunities available for brands in stores and online platforms.

- However, the region does not have a considerable market for the on-trade channel, which is underdeveloped. Consumers eat plant-based dairy at home and are less likely to eat from a restaurant or foodservice outlet. Around 93% of meals or snacks that include milk alternatives are consumed at home, and 7% are consumed at a restaurant or foodservice outlet. Plant-based foods represent less than 1% of all foods shipped by broad-line distributors to commercial and non-commercial foodservice outlets.

- The online channel is expected to be the fastest-growing distribution channel in the off-trade segment. It is projected to register a Y-o-Y growth of 28%, by value, during 2023-2025. Convenience is the primary motivation for 61.1% of shoppers who have transitioned to shopping for more groceries online. This growth is due to the increasing number of smartphone users, which increased by 11 million between 2020 and 2021. Around 45% of the population browses online websites through mobile devices.

Inclination towards low fat products among the North America population

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- In 2022, the North American non-dairy ice cream market witnessed a growth of 6.46%. The growth was attributed to the rising health consciousness among the North American population. Consumers prefer non-dairy ice creams since their fat percentage is comparatively lower than that of animal-milk-based ice creams. The fat percentage in coconut milk is significantly lesser than in animal-based milk. Animal milk provides 60 calories, whereas unsweetened coconut milk provides about 39 calories in a one-cup serving. Since coconut milk has less fat content, it helps mitigate the risk of obesity rate. The consumption volume of non-dairy ice creams in North America is estimated to grow by 17.43% in 2025.
- Out of the top 19 vegan product producers, the top six manufacturers are established in the United States. As a result, the United States dominates the North American non-dairy ice cream market, and it held a share of 94.4% in 2022, followed by Canada, which held a share of 4.77%.
- In 2022, supermarkets and hypermarkets dominated the retailing landscape in the region, as these retailers held a volume of 82.2%. Convenience stores came in second with 10.6% of the market share the same year. Some of these retailers are Walmart, Target, Kroger, Amazon, Costco Wholesale Corporation, Albertsons Companies Inc., Ahold Delhaize USA, and Publix Super Markets Inc.
- The retailing segment offers plant-milk-based ice creams at varied price ranges (low, medium, and high) to captivate consumers' attention. The base selling price of non-dairy ice cream is USD 4.84 to as high as USD 100. The availability of non-dairy ice creams at various prices also accelerates the buying power of consumers.

North America Non-dairy Ice Cream Market Trends

The rising awareness regarding the consequences of obesity is largely driving the North American non-dairy ice cream market.

- Non-dairy ice creams are gaining popularity among consumers because of the rise in the flexitarian, lactose intolerant, or strict vegan populations. In 2022, the US non-dairy ice cream market witnessed a growth of 14.2% compared to 2021. The growth was attributed to the rising awareness about the consequences of obesity. Hence, their preference and consumption of non-fat or less-fat food products significantly increased. The region also observed a growth in its obesity percentage in 2020. In Canada, obesity rates in Canadian adults were higher in men than women (28.0% versus 24.7%, respectively) in 2020.
- The fat percentage in plant-based milk is comparatively lower than in animal-based milk. One plant-based milk, coconut milk, has fat content significantly lesser than animal-based milk, as one cup (8 oz or 240 mL) of unsweetened coconut milk provides 39 calories. Unsweetened hemp milk (made from water and hulled hemp seed) provides about 60 calories in a one-cup serving.
- The region has also witnessed a growth in the volume of lactose-intolerant population. In 2022, in the United States, 15% of adult Caucasians and 85% of African Americans were lactose intolerant. Consumers are even changing to a vegetarian diet to avoid the consequences of the corresponding disease. In January 2022, 10% of Americans over the age of 18 considered themselves to be lactose intolerant.
- In the North American region, non-dairy ice creams are available at different prices, promoting the affordability factor for consumers. In the United States, plant-based ice creams are available from USD 2.14 to over USD 70.5. Non-dairy ice creams are also available in different flavors, including vanilla and chocolate.

North America Non-dairy Ice Cream Industry Overview

The North America Non-dairy Ice Cream Market is fairly consolidated, with the top five companies occupying 86.87%. The major players in this market are Danone SA, Oatly Group AB, Oregon Ice Cream Company, Unilever Plc and Van Leeuwen Ice Cream (sorted alphabetically).

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