

North America Non-Dairy Milk - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2017 - 2029

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Report description:

The North America Non-Dairy Milk Market size is estimated at USD 5.15 billion in 2024, and is expected to reach USD 8.93 billion by 2029, growing at a CAGR of 11.64% during the forecast period (2024-2029).

Rise in modern grocery retailing including hypermarkets and online stores fuels the sales through off-trade channels

- Hypermarkets and supermarkets primarily drive the high market share of off-trade channels. Supermarkets and hypermarkets have always maintained a strong lead in plant-based milk sales in the market. The proximity factor of these channels, especially in large and developed cities, provides an added advantage of influencing the consumer's decision to purchase among the large variety of products available in the market. In the United States, supermarkets and hypermarkets covered 73.97% of plant-based milk sales, in terms of value, in 2022.
- Convenience stores are the second most widely preferred off-trade distribution channel after supermarkets and hypermarkets to purchase plant-based milk. The segment acquired a 12.19% market share, in terms of volume, in 2022. The broader reach and easy access to private label brands drive the consumer preference for traditional grocery stores over other retail channels.
- The online channel in North America is projected to be the fastest-growing distribution channel for plant-based milk. The segment registered a growth of 81.93% in value from 2017-2022. In Canada, the online sales of plant-based milk are anticipated to register a CAGR of 15.09% during the forecast period to reach a market value of USD 23.78 million by the end of 2029.
- The market's growth in the online segment is attributed to the increasing investments by modern grocery stores in the online delivery infrastructure in response to the changing purchasing behavior of Canadian consumers. Almost 22% of Canadians regularly purchased groceries online in 2021. Prominent online retailers in the market studied include Instacart, Amazon Fresh, Walmart, Kroger, Shipt, Thrive Market, Whole Foods, and FreshDirect.

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Adoption of vegan lifestyles among U.S. consumers propels the consumption of plant-based milk

- Plant-based milk is gaining significant acceptance among the US population due to the rising importance of vegetarian diets as a part of healthy lifestyles. Around 68% of US adults have tried a dairy alternative or plant-based meat. Surveys also report that around 34% of respondents are interested in adopting vegan lifestyles to reduce environmental impacts. Therefore, the United States is identified as the major market in the region, with a volume consumption registered growth of 32.57% from 2017-2022.
- The Canadian plant-based milk market is anticipated to register a CAGR of 9.76% during 2023-2029 to reach a market volume of 292,898.79 tonnes by the end of 2023. The market's growth is primarily attributed to the rise in the vegan population. In 2021, retail sales of plant-based ready meals in Canada represented a share of 17% of total free-from-ready meal sales. The growing number of retail partners specializing in vegan food distribution is another key factor driving the growth in the Canadian market. Some retailers include Compass Foods, Instacart, Well.ca, Avron, Walmart, and Amazon. Well.ca offers dairy alternatives of different brands such as Califia, Chobani, Blue Diamond, and Earth's Own.
- As consumers are shifting toward healthy variants featuring no or reduced sugar, the demand for unsweetened plant milk is expected to increase during the forecast period. For instance, eight out of every 10 US adults intentionally avoid or reduce sugar in their diets, with 16% stating that it is the most important thing they are trying to reduce. Key brands specializing in unsweetened plant milk are Silk, Califia, Planet Oat, Orgain, and Elmhurst.

North America Non-Dairy Milk Market Trends

The beneficial factors of plant-based milk products, with a larger impact from environment-conscious consumers, drive consumption in North America.

- Plant-based milk is highly gaining interest in the North American market, as the awareness and proof regarding their benefits are rising in the region. Among all the available plant-based milk, almond milk was the leading type of milk alternative in the United States in 2021. For that year, almond milk was valued at approximately USD 344 million. A favorable proportion of consumers are willing to shift to better products for their bodies, the environment, and animal welfare and move to plant-based sources for their dietary needs. Non-dairy milk is now available as a suitable substitute on the shelves of major grocery and coffee chains in the United States.
- In the United States, 67% of adults have tried non-dairy milk, and about 1 in 3 consume it at least once a week. In addition, 82% of those who consume alternative milk do so because they like the flavor, while 56% are environmentally conscious. Products like soy milk and oat milk are now almost as widespread in American households as some varieties of conventional cow's milk, almost a decade after non-dairy beverages began their slow and steady surge in the North American market.
- The competition for refrigerator space has intensified as players in the market, including manufacturers of plant-based and conventional milk, have begun to highlight various options on the horizon. These solutions include companies in the food technology industry that serve environmentally conscious customers. In 2020, the region's retail sales value of plant-based milk in the world amounted to nearly USD 3.20 billion. With factors like nutritional density, gut health, reduced toxicity (from pesticides), animal welfare, and digestibility, the market is projected to witness a positive impact in the upcoming years.

North America Non-Dairy Milk Industry Overview

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The North America Non-Dairy Milk Market is moderately consolidated, with the top five companies occupying 47.97%. The major players in this market are Blue Diamond Growers, Califia Farms LLC, Campbell Soup Company, Danone SA and Oatly Group AB (sorted alphabetically).

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

Table of Contents:

1 EXECUTIVE SUMMARY & KEY FINDINGS

2 REPORT OFFERS

3 INTRODUCTION

3.1 Study Assumptions & Market Definition

3.2 Scope of the Study?

3.3 Research Methodology

4 KEY INDUSTRY TRENDS

4.1 Per Capita Consumption

4.2 Raw Material/Commodity Production

4.2.1 Dairy Alternative - Raw Material Production

4.3 Regulatory Framework

4.3.1 Canada

4.3.2 Mexico

4.3.3 United States

4.4 Value Chain & Distribution Channel Analysis

5 MARKET SEGMENTATION (includes market size in Value in USD and Volume, Forecasts up to 2029 and analysis of growth prospects)

5.1 Product Type

5.1.1 Almond Milk

5.1.2 Cashew Milk

5.1.3 Coconut Milk

5.1.4 Hemp Milk

5.1.5 Oat Milk

5.1.6 Soy Milk

5.2 Distribution Channel

5.2.1 Off-Trade

5.2.1.1 By Sub Distribution Channels

5.2.1.1.1 Convenience Stores

5.2.1.1.2 Online Retail

5.2.1.1.3 Specialist Retailers

5.2.1.1.4 Supermarkets and Hypermarkets

5.2.1.1.5 Others (Warehouse clubs, gas stations, etc.)

5.2.2 On-Trade

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5.3 Country

5.3.1 Canada

5.3.2 Mexico

5.3.3 United States

5.3.4 Rest of North America

6 COMPETITIVE LANDSCAPE

6.1 Key Strategic Moves

6.2 Market Share Analysis

6.3 Company Landscape

6.4 Company Profiles (includes Global Level Overview, Market Level Overview, Core Business Segments, Financials, Headcount, Key Information, Market Rank, Market Share, Products and Services, and Analysis of Recent Developments).

6.4.1 Blue Diamond Growers

6.4.2 Califia Farms LLC

6.4.3 Campbell Soup Company

6.4.4 Danone SA

6.4.5 Elmhurst Milked LLC

6.4.6 Laird Superfood LLC

6.4.7 Oatly Group AB

6.4.8 The Hain Celestial Group Inc.

7 KEY STRATEGIC QUESTIONS FOR DAIRY AND DAIRY ALTERNATIVE CEOS

8 APPENDIX

8.1 Global Overview

8.1.1 Overview

8.1.2 Porter's Five Forces Framework

8.1.3 Global Value Chain Analysis

8.1.4 Market Dynamics (DROs)

8.2 Sources & References

8.3 List of Tables & Figures

8.4 Primary Insights

8.5 Data Pack

8.6 Glossary of Terms

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