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

Market Report | 2023-08-17 | 155 pages | Mordor Intelligence

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Report description:

The North America Non-dairy Yogurt Market size is estimated at USD 0.75 billion in 2024, and is expected to reach USD 1.40 billion by 2029, growing at a CAGR of 13.30% during the forecast period (2024-2029).

The United States accounts for the largest share of non-dairy yogurt sales among all retail channels

- The off-trade retail channel plays a major role in the sales of plant-based yogurts in North America. This retail channel includes supermarkets and hypermarkets, convenience stores, specialist retailers, and online retailers. Among the off-trade channel, supermarkets and hypermarkets are the largest distribution channel in the North American non-dairy yogurt market. These retail channels are perceived as convenient by customers due to the huge discounts, offers, and schemes available for bulk purchasing. In 2022, the sales value of non-dairy yogurt through the off-trade distribution channel increased by 22.6% compared to 2021.
- In the off-trade segment, the online channel sub-segment is the fastest-growing one, which is anticipated to increase by more than 80% in 2024 compared to 2021. Online shopping is becoming a popular way for consumers to buy non-dairy yogurt due to the increase in busy schedules and lifestyles. In the highly competitive space of e-commerce, where it is easy for customers to leave one retailer to try out another, finding ways to keep customers loyal is essential. As of 2022, around 45% of the population browses online websites through mobile devices.
- The United States plays a major role in the sales of plant-based yogurts in the off-trade channel. In 2022, the country accounted for 90% of value share compared to other countries in the region. As consumers' preference increases toward a vegan lifestyle, the sales of plant-based yogurt also increase through retail channels. For instance, as of 2021, more than 6% of US consumers were vegan, a 500% increase compared to just 1% in 2014.

Rise in vegan population represents lucrative growth opportunities during the forecast period

- Non-dairy yogurts are gaining significant acceptance among the US population due to the rising importance of plant-based diets as a part of healthy lifestyles. About 68% of respondents have tried a dairy alternative or plant-based meat. The survey also reports that around 34% of respondents have an interest in adopting vegan lifestyles to reduce environmental impacts. The United States is identified as the major market in the region, with volume consumption registering a growth of 140.26% from 2017 to 2022.
- Canada is identified as the fastest-growing market, with the consumption of non-dairy yogurt anticipated to register a CAGR of 12.72% during the forecast period. The market's growth can be attributed to the rise in the vegan population and the increasing importance of plant-based food. In 2021, retail sales of plant-based ready meals in Canada represented a share of 17% of total free-from-ready meal sales. The trend is supported by new product launches in the industry. For instance, Boosh Food, Daiya Foods, and Copper Branch are identified as key vegan food companies with the most launches in the last five years.
- Therefore, the market demand during the forecast period is anticipated to be driven by the increasing vegan population, availability of new product offerings, and growing number of retail partners specializing in vegan food distribution. Some of the retailers are Compass Foods, Instacart, Well.ca, Avron, Walmart, and Amazon. For instance, Well.ca offers dairy alternatives from different brands, such as Califia, Chobani, Blue Diamond, and Earth's Own.

North America Non-dairy Yogurt Market Trends

The innovation trends taking place in the non-dairy yogurt market is driving the consumption in the country.

- The North American non-dairy yogurt market was considered to be at a nascent stage until a few years ago. However, the vegan industry has partially bloomed, owing to the rising population of flexitarians in the region. Flexitarians are individuals who are open to exploring both conventional and non-dairy products available in the market. As of January 2022, 15% of Americans identified themselves as flexitarians. Among Americans between the ages of 24-39, 47% identified as flexitarians, meaning they actively reduce the consumption of dairy products in favor of plant-based alternatives. This growing population of flexitarians indicates a significant opportunity for the growth of plant-based yogurts in the coming years.
- The increasing demand for plant-based foods in the region has prompted key players to innovate and launch a wide range of products to meet the rising demand. In countries like Canada (59%) and Mexico (48%), where lactose intolerance is more prevalent compared to the United States (36%), consumers are increasingly leaning toward plant-based foods. The high level of acceptance of plant-based products provides an opportunity to reduce dependence on traditional dairy and dairy products like yogurt and improve outcomes for public health, the environment, and animal welfare.
- In 2021, retail sales of plant-based yogurt in the United States increased by 9%, which is three times higher than traditional yogurt, capturing a market share of 4.5%. The unit sales of plant-based yogurt have experienced rapid growth over the past three years, increasing by 54% to reach 170 million units in 2021. Companies in the market are adopting innovative approaches to develop appetizing plant-based yogurts, introducing new flavors and combinations to meet the requirements of their vegan consumer base. Increased awareness about the advantages of plant-based food is expected to further drive the consumption of non-dairy yogurt in the market.

North America Non-dairy Yogurt Industry Overview

The North America Non-dairy Yogurt Market is moderately consolidated, with the top five companies occupying 61.84%. The major players in this market are Danone SA, Groupe Lactalis, Otsuka Holdings Co. Ltd, The Hain Celestial Group Inc. and Yoso Brands (sorted alphabetically).

Additional Benefits:

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

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