



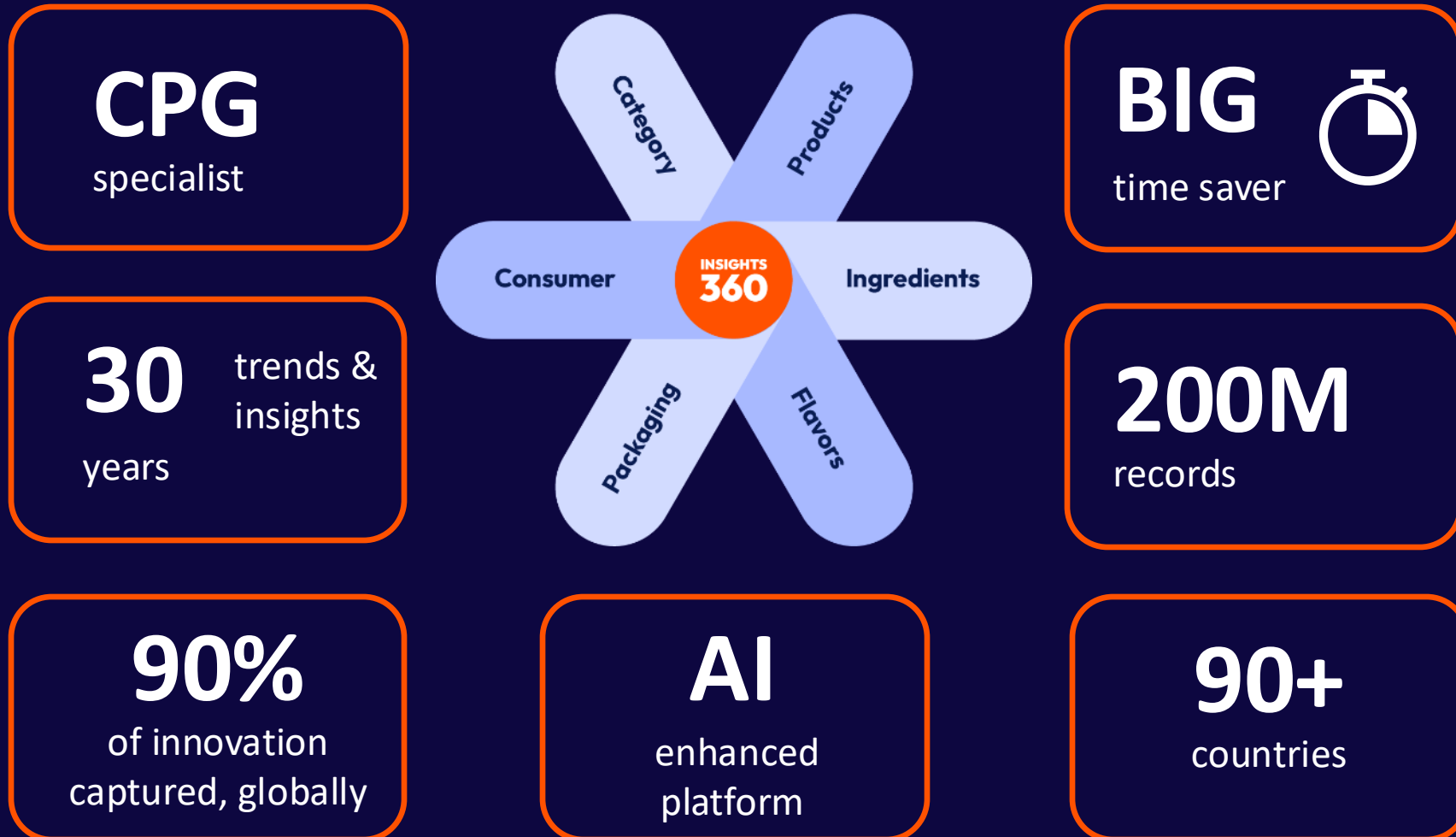
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MARKET  
INSIGHTS

# Top Trends in Dairy - Global

2025



# Innova: insights partner for innovation





TREND #1



# Ingredients and Beyond

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# Trend 1. Ingredients and Beyond

As the demand for added value becomes standard, elevating quality beyond ingredients is key.

Trend #1

Ingredients:  
Taking the  
spotlight



2024 – Finding the star ingredient

Beyond mainstream dairy: Protein everywhere

+11%

Year-over-year growth of dairy tracked with a **high/ source of protein** claim. (Global, YoY 2024 vs. 2023)



Australia, Nov 2024



Norway, Dec 2024

2025 - How to stand out?

*Developing a coherent narrative around quality*

#1

**Quality of product** is the most important factor for consumers in food and beverage brands.



Italy, Jan 2025

**Quality ingredients**

“Lactose-free hay milk yogurt – STG 100% Alto Adige hay milk from cows fed fresh grass, mountain hay, and herbs, raised using traditional Alpine methods.”

**Sources:** Innova Lifestyle & Attitudes F&B Survey 2024 (Average of Brazil, Canada, China, France, Germany, India, Indonesia, Mexico, Spain, UK, US), Innova Database, [Latteria Sociale Merano](#)

# Consumers prioritize product safety & naturalness in dairy

Top claims that influence the consumers' dairy purchasing decision:



## Cheese

1. Product safety

2. Made with real ingredients/natural

3. High in protein



## Milk & flavored milk drinks

1. Made with real ingredients/natural

2. Low/no/reduced sugar

3. Product safety



## Spoonable/ drinkable yogurt

1. Made with real ingredients/natural

2. Product safety

3. High in protein

**Sources:** Innova Category Survey 2024 (Average of 35 countries), [The Pennsylvania State University](#)

**Note:** Q: "Which claims most influence your purchasing decision when buying dairy products?"

# The technology crossover adopted in various ways to guarantee dairy quality

“Which of the following concerns, if any, do you have with regard to dairy consumption?”

## 1. Food quality concerns



October 2024

**VibMilk technology uses a smartphone sensor to detect if milk is fresh or spoiled.**

## 2. Health concerns



November 2024

**Kerry Group acquires LactoSens technology to offer fast, accurate and cost-effective lactose detection**

## 3. Food safety concerns



October 2024

**Milk safety advances: Scientists untangle microbial challenges with AI and metagenomics**

**Sources:** Innova Dairy, Meat & Alternative Protein Survey 2024 (Average of Brazil, Canada, China, France, Germany, India, Indonesia, Mexico, Spain, UK, US), [UNSW Sydney](#), [Food Ingredients First \(1\)](#), [\(2\)](#)

**Notes:** Top 3 responses to the question were: Food quality (e.g., off-taste, off-odor), health concerns (e.g., lactose consumption), food safety (e.g., storage condition)

# Rising dairy standards: Elevating quality by limiting artificial ingredients & promoting healthier nutritional profiles

From no artificial ingredients claims...



To natural sources of goodness and nutrition



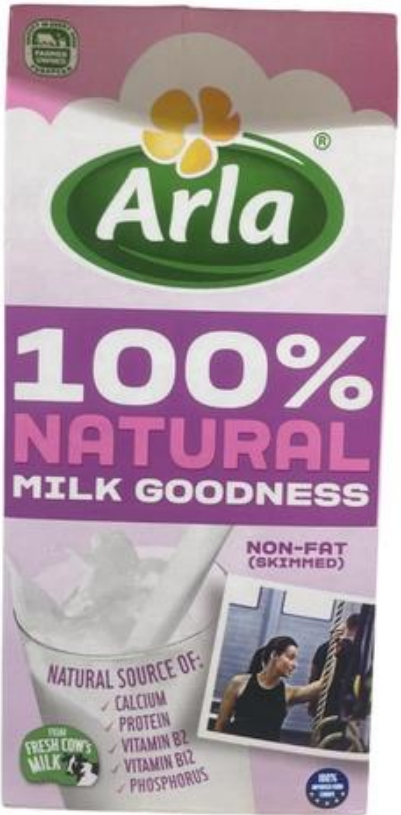
Almost  
**1 in 5**

consumers globally would reduce their dairy consumption due to **artificial ingredients in processed dairy products.**



**“Quality Assured. No artificial ingredients.** No added sugar. **No high fructose corn syrup.”**

United States, Jan 2025



**“Natural source of** calcium, protein, vitamin B2 and B12 and phosphorus. **From fresh cow’s milk.**

United States, Jan 2025

**Sources:** Innova Dairy, Meat & Alternative Protein Survey 2024 (Average of Brazil, Canada, China, France, Germany, India, Indonesia, Mexico, Spain, UK, US)



TREND #2



# Precision Wellness

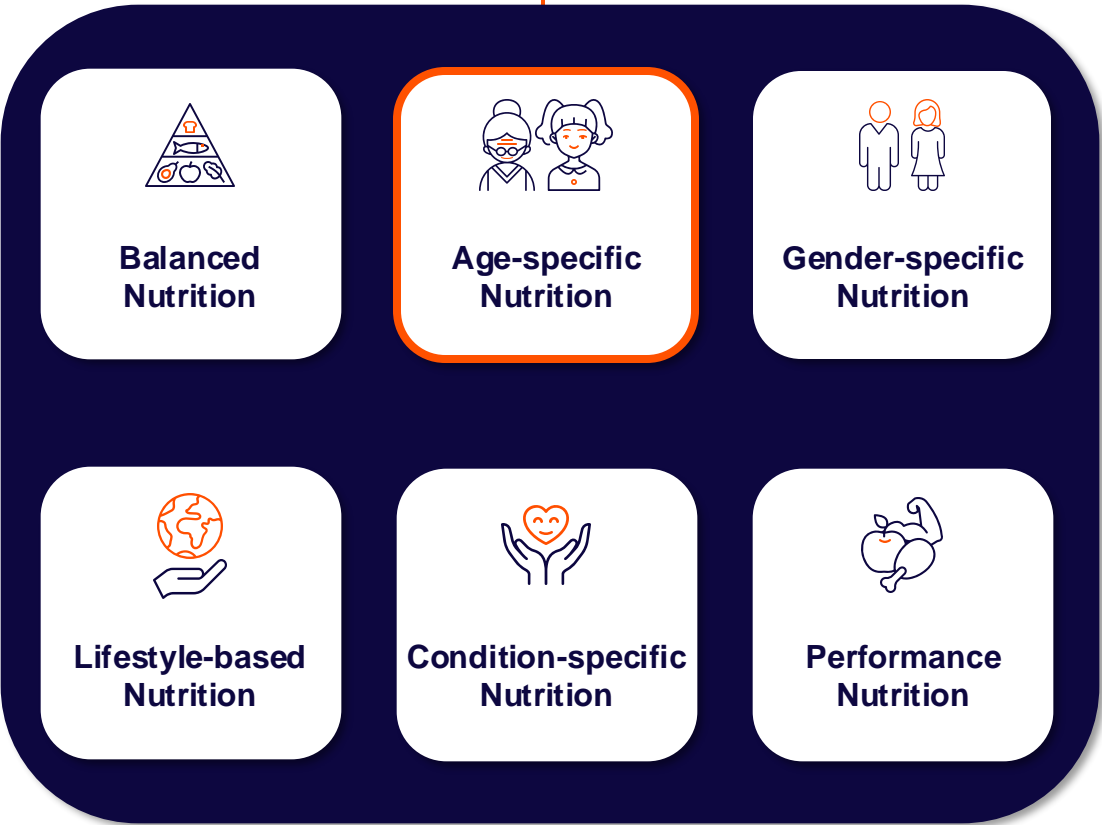
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# Trend 2. Precision Wellness

Information culture raises the bar by challenging brands to meet targeted nutritional needs, at any life stage.

## Top targeted nutrition approaches\*



**+24%** Year-over-year growth in dairy launches with a **children (5-12 years) claim**  
(Global, YoY 2024 vs. 2023)



**Nourishing yogurt for growing kids.** Contains probiotics, vitamin B12 and iodine to help with **immune and brain health**

Australia, Oct 2024

**Sources:** Innova Trends Survey 2025 (Average of Brazil, Canada, China, France, Germany, India, Indonesia, Mexico, Spain, UK, US), Innova Database, Bega Cheese Limited

**Note:** \*Q: “Which of the following targeted nutrition is more desirable to you?”

# Dairy brands customize products for adults & seniors through fortifications

Next to balanced nutrition, **Gen X & Boomers** have purchased age-specific nutrition more in the past 12 months.

“A powdered milk that contains a well-balanced nutrient combination that the adult body requires.”



**Morinaga Milk Life Nutritional Milk Powder For Adults**

Vietnam (import from Japan), Jun 2024

Zero lactose milk fortified with vitamins and minerals for adults 50 plus



Per 200ml glass of milk contains fiber: 10%, calcium: 30%, vitamin E: 15%, vitamin D: 15% and vitamin B12: 15%.

Brazil, Aug 2024

**Sources:** Innova Trends Survey 2025 (Average of Brazil, Canada, China, France, Germany, India, Indonesia, Mexico, Spain, UK, US), Innova Database, [Morinaga Nutritional Foods](#)

**Notes:** Qs: “Which type of targeted nutrition have you purchased in the past 12 months?” “Which of the following targeted nutrition is most desirable to you?”

# Brands are taking steps to craft innovations tailored to specific health needs



1 in 5

consumers globally consider **weight management** as the key health reason for maintaining dairy consumption.

+38%

Year-over-year growth in new dairy launches tracked with a **weight management claim**  
(Global, YoY 2024 vs. 2023)

## Consumers' approaches to weight management

1

Exercise and fitness

2

Diet – reduction (e.g., reduce sugar)

3

Diet – nutritionally balanced approach



“**MI-2 lactic acid bacteria** has been reported to **reduce belly fat** (total abdominal fat) in obese people.”



Japan, Sep 2024

**Sources:** Innova Dairy, Meat & Alternative Protein Survey 2024 (Average of Brazil, Canada, China, France, Germany, India, Indonesia, Mexico, Spain, UK, US), Innova Health and Nutrition Survey 2025 (Average of Brazil, Canada, China, France, Germany, India, Indonesia, Mexico, Spain, UK, US), Innova Database  
**Note:** Q: “If you are actively trying to manage your weight, what approach do you take?”



# Innovation opportunity in condition-specific nutrition apparent in dairy



Condition specific nutrition

+2%\*

## Opportunity gap

The desire for a targeted nutrition approach is more than the actual purchasing behaviors\*

## Resurgence of lactose-free in dairy

United States, Mar 2024



YoY growth of dairy  
**+16%** launches with a **lactose-free** claim (Global, 2024 vs. 2023)

“Same great flavor, **now easy to digest.**”



## Beyond lactose-free milk

Finland, Mar 2024



“**Lactose-free banana cream ice cream** made from lactose-free milk and lactose-free cream.”

United Kingdom, Aug 2024

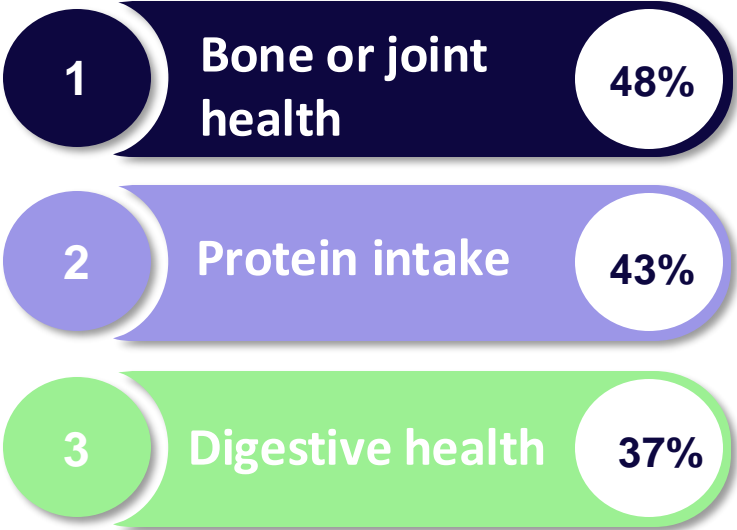


“**Easier to digest if you may be lactose intolerant** or have a sensitive gut. Less than 0.03% of lactose.”

**Sources:** Innova Trends Survey 2025 (Average of Brazil, Canada, China, France, Germany, India, Indonesia, Mexico, Spain, UK, US), Innova Database  
**Notes:** \*Difference between percentage of consumer respondents in the questions: “Which of the following targeted nutrition is most desirable to you?” and “Which type of targeted nutrition have you purchased in the past 12 months?” (“+” difference indicates opportunity gap or innovation opportunity). Condition-specific nutrition e.g., chronic conditions (such as diabetes, heart diseases), food allergies and intolerance, digestive health.

# Why dairy matters: Supporting bone health, protein intake & gut health

“What are your key health-related reasons for maintaining your dairy consumption?”  
(Select up to 5)



Morinaga introduces new multifunctional FFCs\* targeting bone and gut health

March 19, 2024

Aldi launches high-protein ice cream line



Reformulated for high protein

January 30, 2025

Sources: Innova Dairy, Meat & Alternative Protein Survey 2024 (Average of Brazil, Canada, China, France, Germany, India, Indonesia, Mexico, Spain, UK, US), [The DairyNews](#), William Reed Ltd (1), (2)

# Protein continues to take the spotlight in dairy launches



Netherlands, Nov 2024



Netherlands, 2025



Netherlands, Oct 2024

Sources: Innova Database; [Friesland Campina](#)



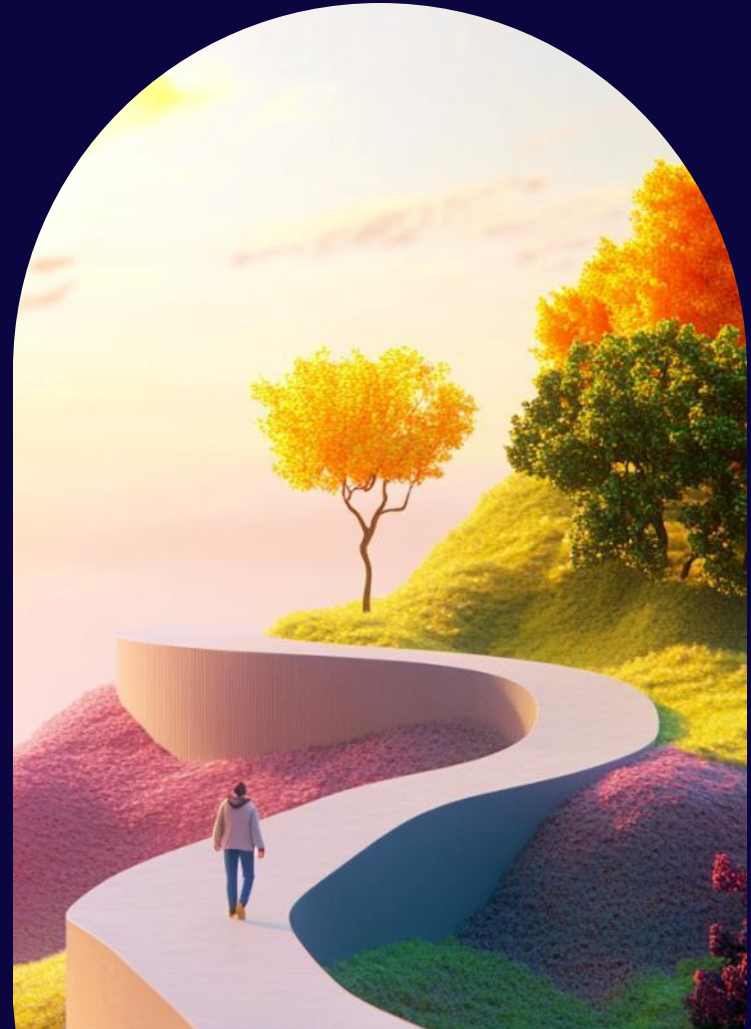
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TREND #6



# Climate Adaption

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## Trend 6. Sustainability: Climate Adaption

Brands and consumers must find balance between personal values and product choices to get ahead of an everchanging climate.



22%

of consumers globally are concerned about **environmental concerns** (e.g., carbon emissions, water usage) with dairy consumption.

“What would you like most to see brand/companies doing to help the environmental/social causes?”  
(Select all that apply)

1

Nature protection

2

Sustainable packaging

3

Improving waste management/  
reducing waste



Germany, May 2024



“What is really outstanding is not only the artisanal, environmentally friendly production, but also the **sustainable packaging made of bamboo paper**, a raw material of the future.”

FLORIDA ICE PURSUES CO<sub>2</sub>-NEUTRAL ICE CREAM PRODUCTION

**Sources:** Innova Dairy, Meat & Alternative Protein Survey 2024 (Average of 35 countries), Innova Lifestyle & Attitudes F&B Survey 2024 (Average of Brazil, Canada, China, France, Germany, India, Indonesia, Mexico, Spain, UK, US), Florida Eis Green

**Note:** Q: “Which of the following concerns, if any, do you have with regard to dairy consumption?” (Select up to 4)

# The dairy industry is adopting various sustainable practices to reduce its environmental impact



**+89%**

Year-over-year growth of dairy launches tracked with **regenerative agriculture** claim (Global, YoY 2024 vs. 2023)



·DELICIOUSLY·  
REGENERATIVE

United Kingdom,  
Oct 2024

“**Farming regeneratively**, using those magic hooves to lock carbon away and recycle nutrients, can keep soil healthy and benefit nature.”



**28%**

of consumers globally say **less product waste** in plant-based alternatives would encourage their purchases of these products.



**Arla Foods Ingredients harnesses upcycling potential of acid whey**

October 22, 2024



The “**Upcycle Your Whey to Value**” concept addresses a sustainability issue in the dairy industry, where two-thirds of milk for Greek yoghurt and strained products is wasted.

**Sources:** Innova Database, Innova Dairy, Meat & Alternative Protein Survey 2024 (Average of 35 countries), [Golden Hooves](#), [Arla](#)

**Note:** Q: “Which benefits of plant-based alternatives would encourage you to buy more plant-based products?”

# Dairy brands are progressively advancing in their efforts toward animal welfare in dairy farming



**1 in 4** consumers are concerned about **animal welfare** claims with regard to dairy consumption.

## Holistic enviro-animal approach

**+16%**

Average annual growth  
of **animal welfare**  
**claims** tracked in dairy  
launches  
(Global, CAGR 2022-2024)



*Fresh from  
one of our 1300  
Müller farms*  
Our milk is sourced from  
a trusted community of  
more than 1300 dairy farms.  
Our farmers care for their  
cows and share our values  
to ensure high animal  
welfare standards and  
*great tasting milk*

United Kingdom, Nov 2024



Germany, Dec  
2024

“Naturland stands for a **holistic ecological-social approach**. Stricter organic guidelines than required by law. More exercise and fresh air or grazing in summer. Species-appropriate organic feed & fresh grass in summer. **Extra animal welfare checks.**”

**Sources:** Innova Dairy, Meat & Alternative Protein Survey (Average of Brazil, Canada, China, France, Germany, India, Indonesia, Mexico, Spain, UK, US), Innova Database



# Sustainable packaging: A critical component in the dairy industry’s goal toward a sustainable future



Australia, Dec 2024



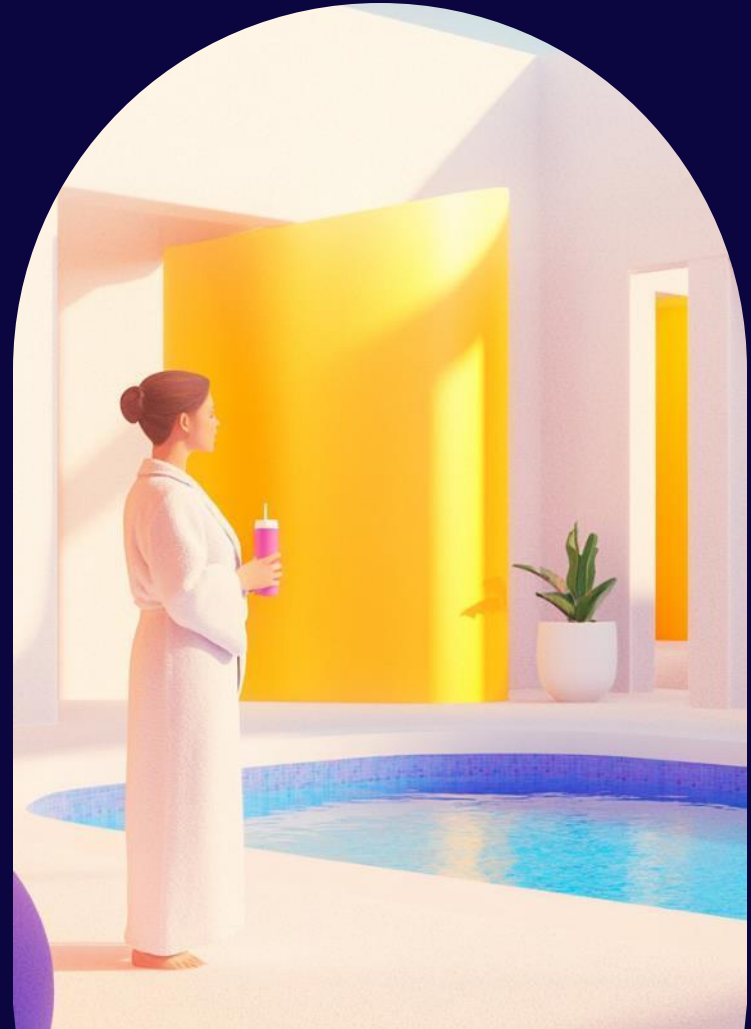


TREND #7



# Taste the Glow

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# Trend 7. Taste the Glow

With the cosmetic industry booming, now is the time to bring beauty-enhancing features into food.



1 in 5

consumers globally have purchased F&B to **improve physical appearance/beauty** in the last year.

## Top opportunity areas\*

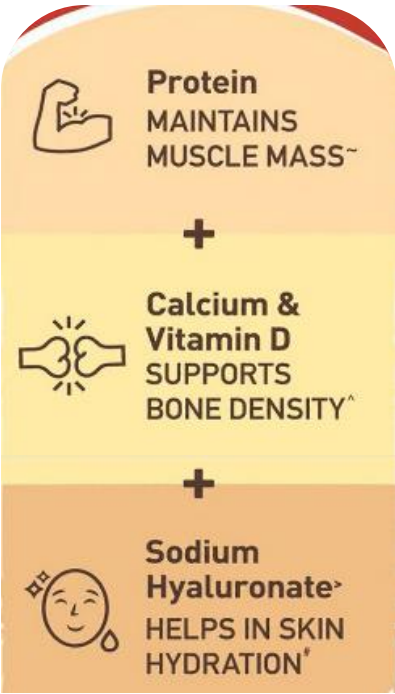
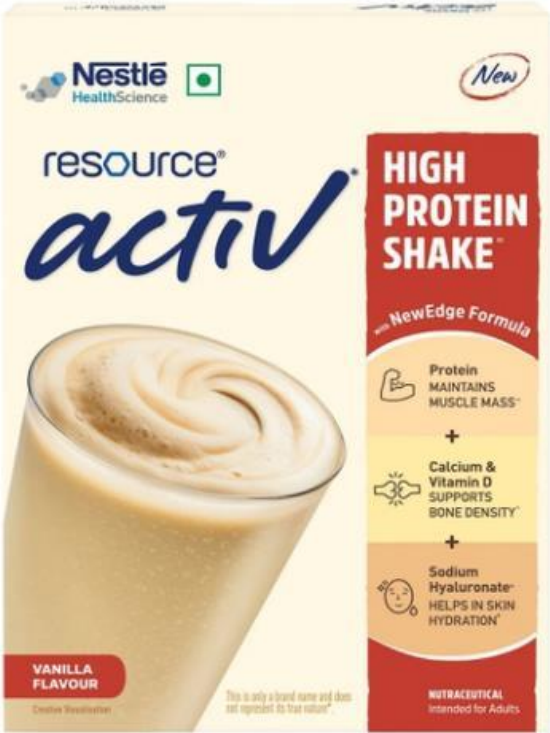
#1 Facial skin

#2 Hair

#3 Body skin

+21%

Average annual growth in new dairy launches with a **skin health claim**  
(Global, CAGR 2022-2024)



India,  
Jun 2024

**Sources:** Innova Trends Survey 2025 (Average of Brazil, Canada, China, France, Germany, India, Indonesia, Mexico, Spain, UK, US), Innova Database

**Note:** Q: "To what extent do the following physical appearance aspects concern you?"\* (Sum of extremely concerned and very concerned).

# Beauty from within: Interconnectedness of nutrition & appearance in dairy

Nearly  
**1 in 5**

Of consumers globally look for **dairy** when they want to maintain/improve **physical appearance (skin, hair, nails...)**

## Probiotic Smoothie + Collagen



Lifeway Foods unveils first probiotic collagen smoothie with kefir cultures

Contains **5g of collagen per serving** to support skin hydration, elasticity, smoothness and joint health.

United States, Dec 2024



# Along with vitamins & calcium, consumers seek collagen for beauty & wellness

Top ingredients consumers look for in functional food and beverage for physical appearance

1

Vitamin C

2

Vitamin E

3

Collagen



**Mokate Beauty Shake**  
**Smak Truskawkowy:**  
**Beauty Shake**  
**Powder**

Poland, Nov 2024

A shake that combines a tasty strawberry flavor **with the benefits of collagen and vitamin C** – all you have to do is pour cold milk over the powder, mix thoroughly and it's ready.



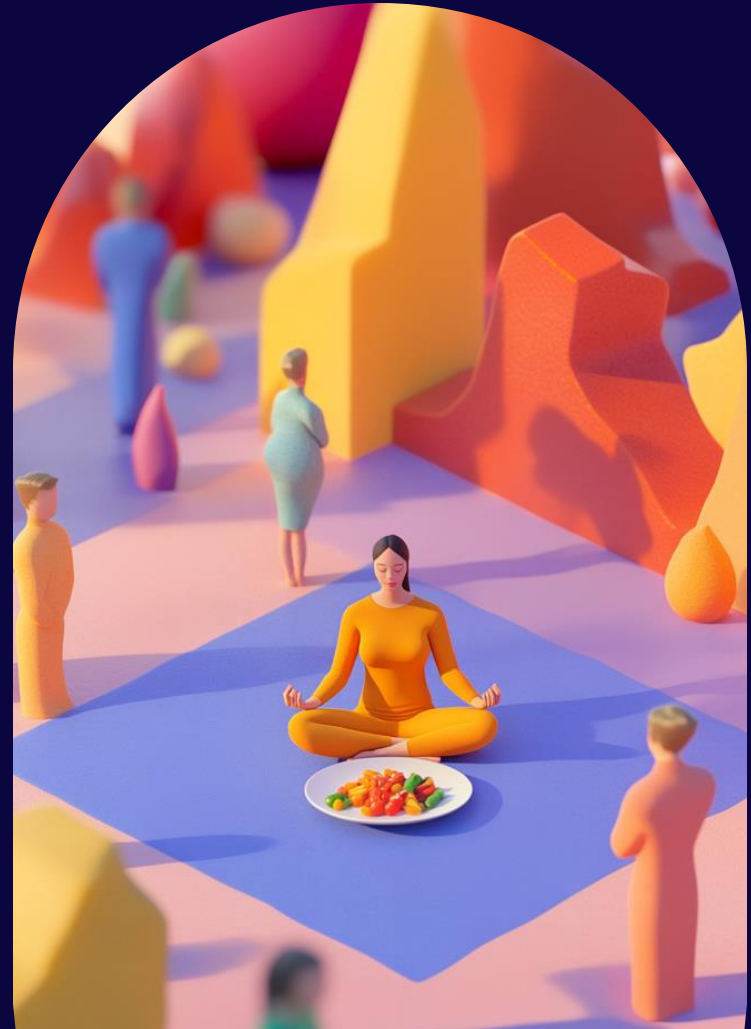
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TREND #9



# Mindful Choices

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# Trend 9. Mood Food: Mindful Choices

As consumers prioritize their mental and emotional wellbeing, brands are crafting innovations that connect with their feelings.

**High attention** of consumers toward mental health



**36%**

of consumers globally say:

Feeling **mentally/emotionally** well is their **primary health goal**.



**Goal:**  
**Fulfilling the opportunity gap**



“Enriched with **vitamin B complex** and **L-5-hydroxytryptophan** – the precursor to the “happy” neurotransmitter called “serotonin.”

**Low association** between mental health & functional F&B

Mental aspects for which consumers purchase functional food:

**#1 None of the aspects is a purchase driver**

**#2 Stress & anxiety**

**#3 Tiredness & fatigue**

**Sources:** Innova Lifestyle & Attitudes F&B Survey 2024 (Average of Brazil, Canada, China, France, Germany, India, Indonesia, Mexico, Spain, UK, US), Innova Database, [Vinamilk](#)

**Notes:** Qs: “What are your main concerns related to your mental health?” “For which of the following mental health aspects have you purchased functional food and beverage in the past 12 months?”

# Dairy brands are increasingly addressing stress management



1 in 5

consumers globally look for **dairy** to maintain/improve their **mental health**.

+114%

Year-over-year growth of dairy launches tracked with a **stress claim**\*  
(Global, YoY 2024 vs. 2023)

Japan, May 2024



**Asahi Plus Calpis Sleep Intestinal Care Lactic Acid Bacteria Drink**

“Contains the **Gasseri strain CP2305**. CP2305 strain can relieve **psychological stress**, **improve sleep quality** (sleep depth), and regulate the intestinal environment.”

**Sources:** Innova Database, Innova Trends Survey 2025 (Average of Brazil, Canada, China, France, Germany, India, Indonesia, Mexico, Spain, UK, US), Asahi

**Notes:** \*New product launches tracked in a search for stress claims are added in the slide notes. Growing from a small base with less than 10 launches in 2023



# Dairy brands are also tapping into consumer desire for better sleep

36%

of consumers globally say **getting more sleep** is a way that they are improving their mental or emotional wellbeing



March 2024

**Meiji launching functional milk that supports vision and sleep.**

Contains crocetin and tryptophan



China,  
Feb 2024

**Nestlé's China new milk powder developed for sleep quality.**

Made from a blend of bioactive ingredients such as tryptophan, vitamin B & magnesium.

**Sources:** Innova Database, Innova Trends Survey 2025; Innova Lifestyle & Attitudes Survey 2024; [William Reed Ltd. \(1\)](#), [\(2\)](#)

**Notes:** \*New product launches tracked in a search for stress claims are added in the slide notes. Growing from a small base with less than 10 launches in 2023

# Exploring indulgent dairy innovations to uplift mood

Consumers indulge to feel better



49%

of consumers globally try **indulgent**/premium food and beverages **to alleviate their mood**.



Germany, Oct 2024



“Heavenly, delicate cinnamon notes and an unbelievable creamy caramel sauce, packed into **an ice cream so delicious that you’ll melt away...**

This treasure **will take you to your absolute feel-good place.**”

**Sources:** Innova Trends Survey 2025 (Average of Brazil, Canada, China, France, Germany, India, Indonesia, Mexico, Spain, UK, US), Innova Database, [Nomoo](#)





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# Key Takeaways

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# Key Takeaway

1

## Focus on expanding the narrative

*Add value to ingredients by going beyond just the ingredient. Instead, place greater emphasis on the **quality or quantity** of ingredients and the direct **benefits they can deliver**.*

2

## Offering targeted nutrition

*Brands are recognizing the importance of **personalized nutrition, catering to specific dietary needs** and health goals across various life stages will remain important.*

3

## Sustainability

*Environmental protection is a key concern for consumers. Sustainable practices, such as **regenerative agriculture, waste reduction, and animal welfare** in dairy launches, can enhance **consumer trust**.*



# How can we help?



## NEW PRODUCT ANALYSIS

Dive into NPD launches in spaces you are interested in through our database and dashboard



## CATEGORY DEEP DIVES

Explore insights in and out of category through comprehensive reports and surveys



## CONSUMER INSIGHTS

Understand more about consumer lifestyle shifts needs and behavior through our surveys.



## EXPERT CONSULTANCY

Let us help you identify opportunities and explore them in depth with expert analysis



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