

Contents

1. How do we identify the Key Trends?	slide 8
2. Summary	slide 14
3. The 10 Key Trends	slide 26
Key Trend 1	slide 27
Snackification Case Studies	slide 43
Key Trend 2	slide 61
Fat/sugar Case Studies	slide 82
Key Trend 3	slide 97
Cheese Case Studies	slide 115
Key Trend 4	slide 130
Protein Case Studies	slide 146
Key Trend 5	slide 153
Digestive Wellness Case Studies	slide 165
Key Trend 6	slide 174
Dairy-free Case Studies	slide 200
Key Trend 7	slide 220
Permission to Indulge Case Studies	slide 229
Key Trend 8	slide 244
Key Trend 9	slide 258
Digital Revolution Case Studies	slide 274
Key Trend 10	slide 283
Hello Savory Case Studies	slide 288

List of case studies

Case Study 1: Moon Cheese - a snacking strategy to create a new category for long shelf-life cheese	slide 44
Case Study 2: Lala drinking yoghurt aims to expand Americans' healthy snacking repertoire	slide 52
Case Study 3: Noosa shows how successful full-fat yoghurt can be	slide 83
Case Study 4: Annie's converts parents to the benefits of full-fat yoghurt	slide 90
Case Study 5: Sargento Balanced Breaks - Cheese reinvented as a naturally healthy whole food snack	slide 116
Case Study 6: Good Culture leverages the protein benefits of cottage cheese	slide 124
Case study 7: L-Men - connecting to protein can be a successful strategy for niches in Asia	slide 147
Case Study 8: Premium pricing no barrier to success for P3 Portable Protein Pack	slide 149
Case Study 9: A2 Milk - a digestive wellness business	slide 166
Case Study 10: Ades soy milk and juice in Brazil	slide 201
Case study 11: Coconut Collaborative takes the non-dairy challenge to yoghurt to the next level	slide 209
Case Study 12: Ben & Jerry's enters the non-dairy ice-cream market	slide 214
Case Study 13: The Collective: permissible indulgence + good marketing	slide 230
Case Study 14: Yasso frozen Greek yogurt desserts "a little bit of indulgence"	slide 238
Case Study 15: Souvenaid, a medicalised dairy drink profiting from an e-commerce focus	slide 275
Case Study 16: A Spanish dairy combines sport milk with mobile app	slide 280
Case Study 17: Vigor introduces Brazil to savory Greek yogurt	slide 289
Case Study 18: Chobani - a mass-market brand introduces savory yoghurts	slide 293
Case Study 19: Chaat – a start-up in savory yoghurt snacks with global flavours	slide 299
Case Study 20: Sohha savory yogurts bring Mediterranean flavours to dairy snacking	slide 304

List of tables and charts

Chart 1: We test the trends on 8 key parameters	slide 10	Table 1: Nutrition snapshot, Cheddar Moon Cheese	slide 50
Chart 2: Where the dairy trends sit on the product lifecycle	slide 13	Table 2: Nutrition snapshot, Pepper Jack Moon Cheese	slide 51
Chart 3: Successful brands connect to several key trends	slide 16	Table 3: Nutrition snapshot, Lala yogurt smoothie – vanilla	slide 59
Chart 4: Snacking transforms commodities into a value-added, high-margin business	slide 36	Table 4: Nutrition snapshot, Lala yogurt smoothie – wild strawberry	slide 60
Chart 5: Dairy pioneered single-serve convenience 25 years ago	slide 41	Table 5: Nutrition snapshot, Noosa full-fat yogurt – Coconut	slide 88
Chart 6: Cheese is the next big snacking opportunity	slide 42	Table 6: Nutrition snapshot, noosa full-fat yogurt – Passion fruit	slide 89
Chart 7: Lala competitively priced to drive growth	slide 54	Table 7: Nutrition snapshot, Annie’s whole milk yogurts – Vanilla	slide 95
Chart 8: Fat and sugar content of yoghurt brands, UK	slide 78	Table 8: Nutrition snapshot, Annie’s whole milk yogurts – Berry patch	slide 96
Chart 9: Sugar vs fat content (g/100g) in yogurt, US	slide 79	Table 9: Nutrition snapshot, Balanced Breaks	slide 123
Chart 10: Fat and sugar content of yoghurt brands, the Netherlands	slide 80	Table 10: Nutrition snapshot, Good Culture	slide 129
Chart 11: Noosa’s super-premium pricing no barrier to success	slide 87	Table 11: Nutrition snapshot, P3 Nut Clusters	slide 152
Chart 12: Annie’s price comparison	slide 94	Table 12: Common claims used in plant-based milks	slide 184
Chart 13: There is growth potential for cheese in many countries	slide 110	Table 13: Nutrition snapshot, Ades soy milk + fruit juice	slide 206
Chart 14: Cheese to catch up with yoghurt	slide 113	Table 14: Nutrition snapshot, Ades soy milk + fruit juice, no added sugar	slide 207
Chart 15: Premium pricing strategy has not hindered growth	slide 117	Table 15: Nutrition snapshot, Ades soy milk + fruit juice, kids	slide 208
Chart 16: Good Culture is premium-priced	slide 125	Table 16: Nutrition snapshot, Coconut Collaborative yoghurt	slide 213
Chart 17: Oscar Mayer P3 price comparison	slide 149	Table 17: Nutrition snapshot, Ben & Jerry’s non dairy Chunky Monkey	slide 218
Chart 18: The upward march of A2 Milk	slide 166	Table 18: Nutrition snapshot, Ben & Jerry’s non dairy Fudge Brownie	slide 219
Chart 19: Dairy alternative market size and growth rate	slide 179	Table 19: Nutrition snapshot, Collective Dairy Russian Fudge	slide 236
Chart 20: Where is non-dairy most popular?	Slide 180	Table 20: Nutrition snapshot, Collective Dairy kids’ Sassy Strawberry Suckies	slide 237
Chart 21: Dairy giant Danone commits to growing the non-dairy market	slide 189	Table 21: Nutrition snapshot, Yasso blueberry frozen Greek yoghurt	slide 241
Chart 22: Dairy giant Danone commits to growing the embryonic non-dairy yoghurt and desserts markets	slide 190	Table 22: Nutrition snapshot, Yasso chocolate fudge frozen Greek yoghurt	slide 242
Chart 23: Coconut Collaborative is premium priced	slide 210	Table 23: Nutrition snapshot, Yasso sea salt caramel frozen Greek yoghurt	slide 243
Chart 25: Ben & Jerry’s non dairy ice cream price comparison	slide 217	Table 24: Nutrition snapshot, Sport Life Recovery	slide 282
Chart 26: Super-premium pricing is no barrier to success	slide 233	Table 25: Nutrition snapshot, Vigor savory Greek yogurt – Black Olives	slide 292
Chart 27: Premium-priced niches growing as low-cost “volume market” falls	slide 249	Table 26: Nutrition snapshot, Chobani Flip Sriracha Mango	slide 297
Chart 28: “Niches” set to become 30% of the market by 2020	slide 251	Table 27: Nutrition snapshot, Chobani Flip Chipotle Pineapple	slide 298
Chart 29: Digital Revolution drivers	slide 262	Table 28: Nutrition snapshot, Chaat Cucumber Mint	slide 302
Chart 30: Chobani savoury yogurts are premium priced	slide 296	Table 29: Nutrition snapshot, Chaat Mango Chili	slide 303
Chart 31: Chaat savory yogurts are premium-priced	slide 301		