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PLANT-BASED DAIRY GOES MAINSTREAM

Tracking plant-based dairy momentum and market potential

2025 TREND REPORT

AMANO
Amano Enzyme

INTRODUCTION

Plant-based dairy is an evolving market which is estimated to reach $28 billion by 2030. This growth across global regions, at a CAGR of 8.7% during the period of 2023-2030, is driven by fundamental shifts in consumer preferences, regulatory frameworks and technological capabilities.[1] As a leader in non-GM and organic-compliant specialty enzymes in the plant-based dairy market, Amano Enzyme shares its insight into the current landscape of plant-based beverages and cheese, highlighting key trends, market dynamics and consumer behaviors that shape this category. This analysis provides actionable insights for market positioning, competitive differentiation and investment prioritization, enabling informed decision-making for sustainable growth in plant-based dairy manufacturing.

THE RISE OF PLANT-BASED DAIRY

The global plant-based dairy market demonstrates exceptional growth momentum, driven by increasing consumer demand for healthier, more sustainable and cleaner label alternatives. The market has moved beyond niche positioning, as plant-based dairy alternatives have entered the mainstream. Their presence in everyday food consumption and popularity across a variety of usage occasions—including coffee, cereal, cooking and protein shakes—is fueling market growth worldwide, creating substantial opportunities for manufacturers to address formulation challenges through innovative enzyme solutions.

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FUELING THE FUTURE WITH ORGANIC & PLANT-BASED GROWTH

Consumer interest in organic and plant-based products is rising in parallel. Over the past 25 years, growth of the worldwide organic food market has grown steadily. With worldwide sales of less than $20B in 1999 to sales of nearly $140B in 2023, the popularity of organic foods continues to grow.[2] This shift towards clean, natural and sustainable food choices aligns with the appeal of plant-based dairy.

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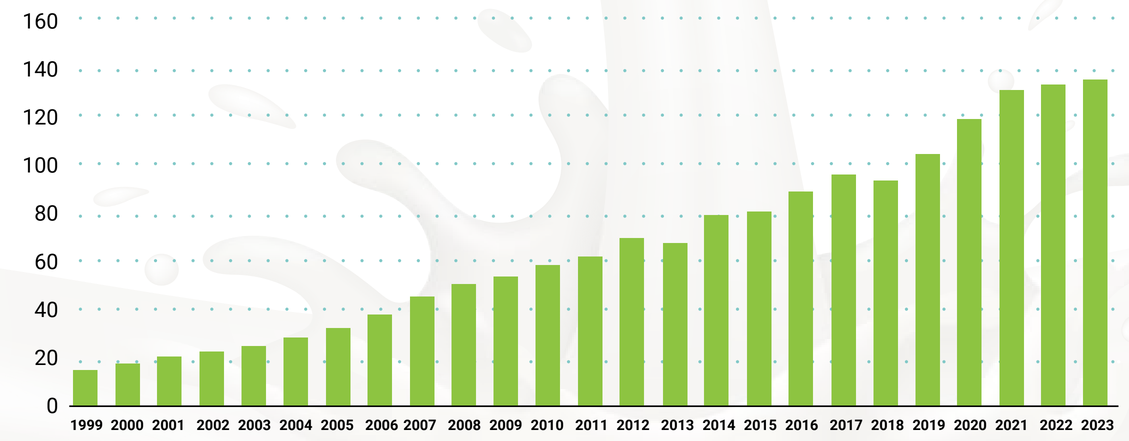
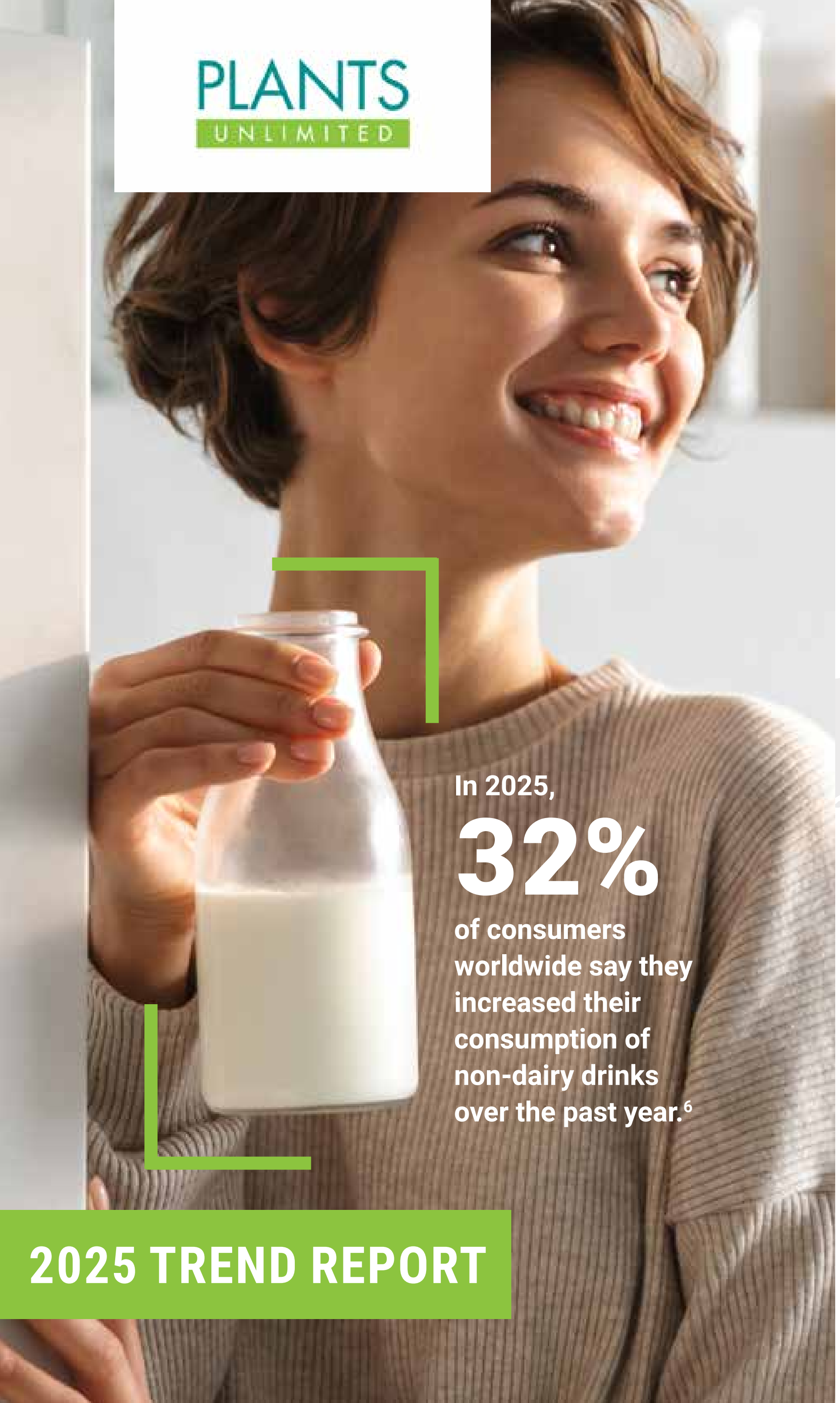
WORLDWIDE SALES OF ORGANIC FOOD FROM 1999 - 2023
(IN BILLION U.S. DOLLARS)



WORLDWIDE SALES OF ORGANIC FOOD HAVE INCREASED SEVENFOLD BETWEEN 1999 AND 2023 AND ARE FORECASTED TO GROW TO $36B BY 2028[3]



In 2025, **32%** of consumers worldwide say they increased their consumption of non-dairy drinks over the past year.[6]

MARKET SIZE & CONSUMER BEHAVIOR

Regional preferences create distinct enzyme opportunities. In the U.S., almond drink dominates with 43% market share, requiring protein stabilization for coffee compatibility.[4] In the EU, oat drink leads the market, particularly Germany's 75% preference, which demands sugar profile optimization.[5] The Asia-Pacific market offers the highest growth potential through multi-functional enzyme solutions.

SHARE OF THE 2025 GLOBAL DAIRY ALTERNATIVES MARKET[6]

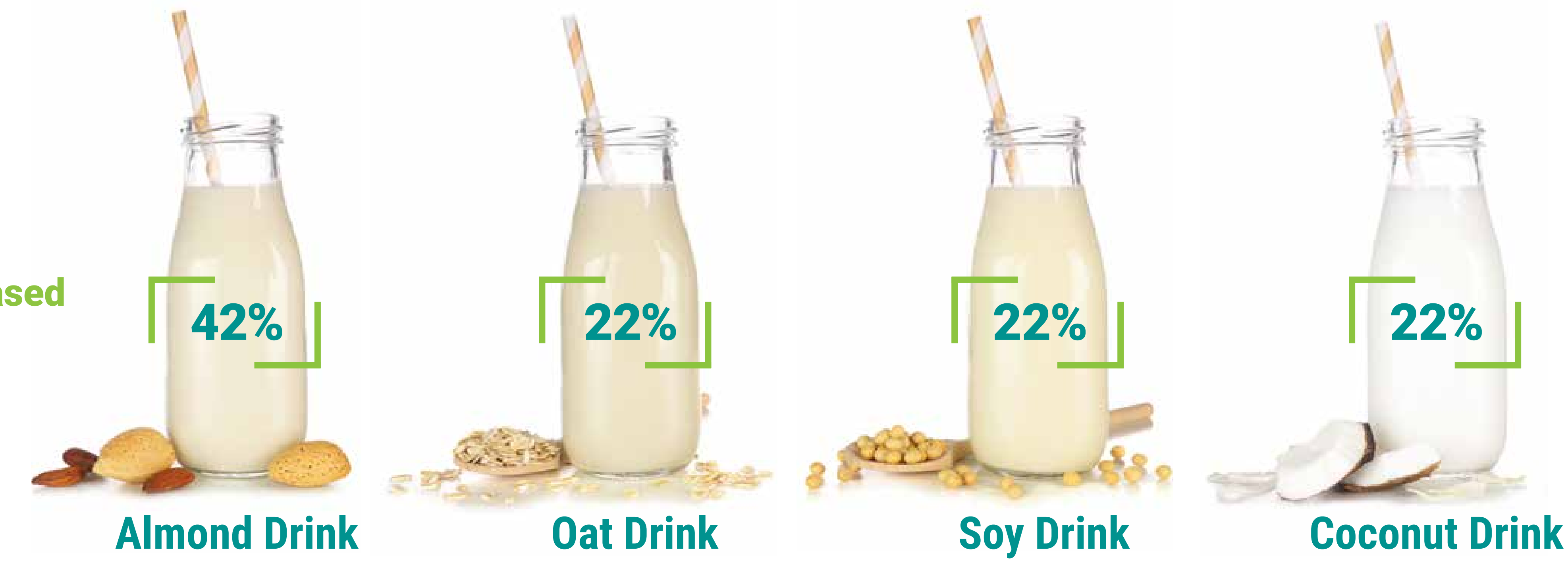
18% U.S.

46% Europe

19% Asia

THE U.S. DAIRY ALTERNATIVES MARKET

Popularity of Plant-Based Beverages in the U.S.



Based on three-month consumer purchasing patterns[4]

In the U.S., the plant-based dairy (dairy alternatives or DA) market is experiencing gradual growth, primarily driven by younger consumers. Nearly 70% of consumers under age 35 purchase DA products, indicating that as Gen Z and millennials gain more earning power, the DA market will see organic growth.[7] The U.S. DA market is also supported by shifting generational preferences and a growing multicultural population.

INNOVATION IS THE KEY INGREDIENT

Innovation, especially in categories like plant-based cheese, is expected to help expand the market and shift consumer perceptions. Successful brands focus on making dairy alternative products similar to dairy in taste, texture and price, and to use simple, familiar ingredients.[7] While plant-based cheese is experiencing gradual growth in the U.S., it remains a niche segment. Growth is driven by "alternative-curious" consumers—those seeking to reduce dairy for health or environmental reasons rather than strict dietary needs.[7]

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Across all age groups, consumers ranked health benefits as the factor they value most when considering plant-based foods.[8]

25% of consumers say ‘Made with real ingredients/natural’ is the top factor of influence when they buy non-dairy beverages.[4]

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WHAT’S DRIVING GROWTH IN NON-DAIRY BEVERAGES?

A quarter (25%) of respondents say **‘Made with real ingredients/natural’** is the top factor of influence when they buy non-dairy drinks,[6] reinforcing the demand for clean labels.

49%

of respondents say they buy non-dairy drinks because **‘It's healthy’**[6]

49%

of respondents say **‘Taste/flavor’** is the top factor of importance when they buy non-dairy drinks.[6]

In addition to health, 32% of consumers say they **increased** their consumption of non-dairy drinks over the past year because:[6]

- The lifestyle needs of myself or my household have changed
- My taste preference has changed

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CONSUMER INSIGHTS & CHALLENGES

Product development in the plant-based dairy market is increasingly shaped by regional taste preferences and consumer expectations. **With consumers valuing health benefits, taste and real, natural ingredients, enzyme solutions can address all of these requirements** by providing protein stability, taste optimization and clean label compliance—enabling premium positioning and competitive differentiation over traditional stabilizers.

CONSUMER PREFERENCES IN THE U.S.

Almond drink remains one of the most popular non-dairy beverage options in the U.S., consistently leading the category in terms of consumer purchases and market share. In 2024, 43% of U.S. consumers reported purchasing almond drink in the past three months, making it the most purchased non-dairy beverage, well ahead of oat, coconut and soy drinks.[4]

Consumers are also calling for barista-grade products that deliver high performance, quality and consistency.

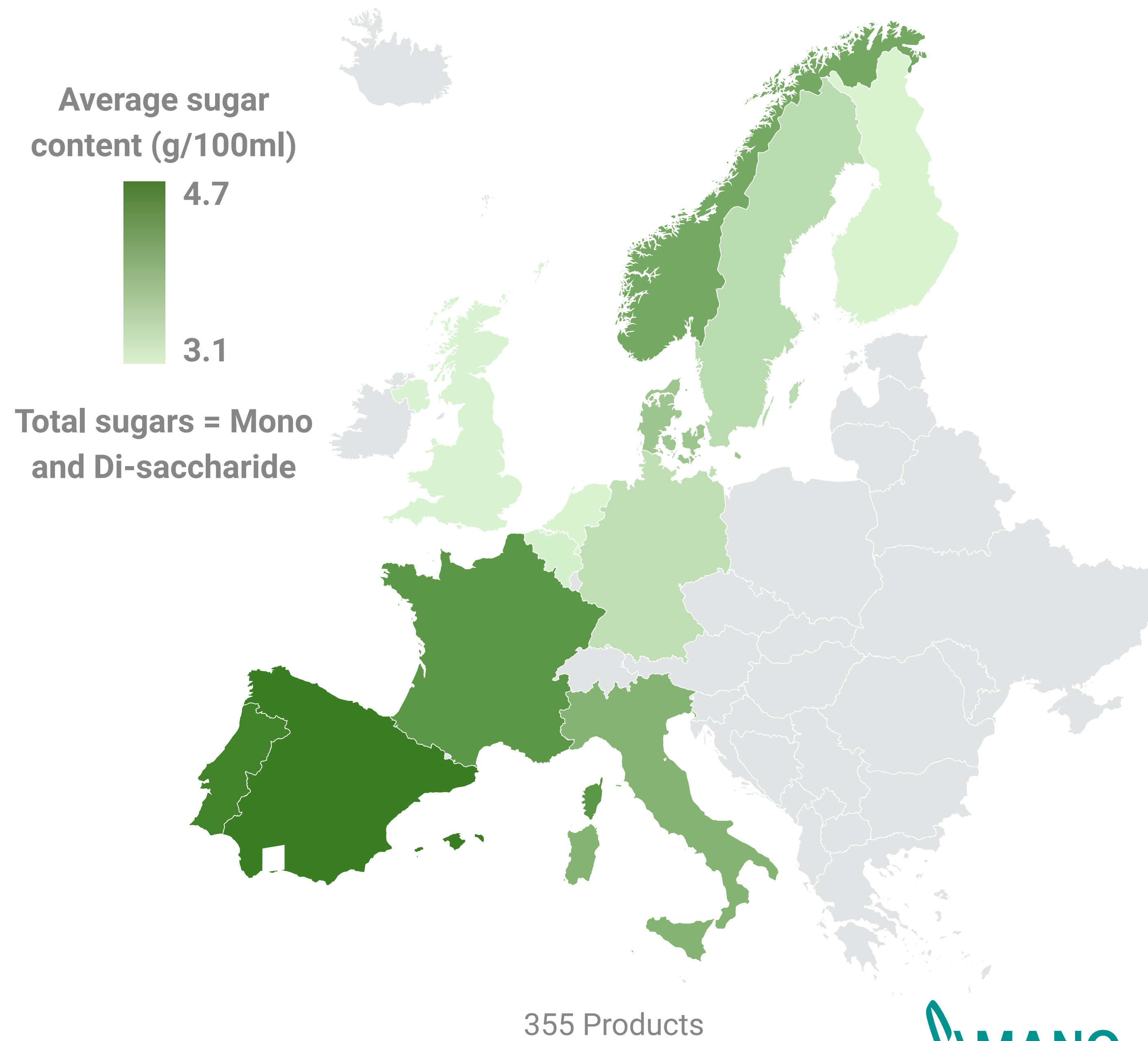
The U.S. leads in launching new clean label barista-style dairy alternative drinks. Globally, oat drink is the most popular ingredient in these beverages, used in 29% of new launches, followed by coconut drink and coconut cream, each at 24%.[9]

CONSUMER PREFERENCES IN THE EU

Consumer preferences across the EU are changing. 54% of European consumers say that they actually prefer plant-based dairy beverages. For example, in Germany, oat drink now comes out on top, with 75% of non-dairy drink consumers making it their go-to.[5]

Distinct differences emerge within Europe: consumers in northern Europe tend to favor less sweetness, while those in southern Europe lean towards sweeter profiles.[5]

Sugar Levels in Oat Drinks By Country



GLOBAL CONSUMER PREFERENCES & CHALLENGES

Globally, there is rising popularity in "zero sugar" or “no sugar” labeling, reflecting a broader shift toward healthier, label-conscious choices. This trend is especially strong in Western Europe, which remains the top region in no sugar dairy alternative drinks.[10] Globally, zero sugar dairy alternative drink launches are exhibiting high growth with a CAGR (2020-2024) of +22%.[10]

Despite strong growth and demand, the plant-based dairy market still faces challenges, such as higher prices and lower protein content compared to dairy. Dissatisfaction in the texture of dairy alternatives include issues like curdling in hot drinks and watery consistency.

Other formulation challenges exist, including managing sugar profiles in plant-based drinks, with a trend shifting to more of a maltose-rich profile.

50% of U.S. consumers cite "taste, flavor and texture concerns" as a reason for not using dairy alternative products.[7]

Key challenges/complaints from consumers related to dairy alternatives:[7]

- Taste and flavor
- Texture
- Too artificial/processed
- Price
- Cooking/baking performance

TRENDS IN INNOVATION & FORMULATION

3

The plant-based dairy industry is actively responding to consumer expectations with new formulations that prioritize clean labels, high-protein content and improved functionality.

81% of consumers believe detailed labeling and clean ingredients are important.[12]

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RESPONDING TO CONSUMER DEMANDS

BARISTA-SPECIFIC AND PERFORMANCE-BASED NON-DAIRY BEVERAGES are also gaining traction. Consumers have high expectations in taste and texture for these plant-based beverages. No additives/preservatives is the top clean label positioning in new clean label barista dairy alternative drink launches.[9]

CLEAN LABEL reformulation is driven by consumer demand for transparency, recognizable ingredients and minimal artificial additives. However, taste, shelf life and clear communication remain important considerations for brands pursuing clean label strategies.[11] In the U.S., the clean label reformulation trend is highly relevant across food and drink categories.[11] In fact, 81% of consumers believe detailed labeling and clean ingredients are important.[12] Despite its appeal, clean label reformulation remains complex—balancing simplicity with functionality can be a formulation challenge.

HIGH-PROTEIN product development is accelerating, particularly in the U.S., driven by strong consumer demand for products that support health, satiety and active lifestyles. Key reasons include health and nutrition focus, innovation across categories and consumer motivations.[13]

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73% of consumers agree that they would like a better plant-based cheese alternative that tasted like regular cheese, melted well and didn't have a grainy texture.[8]

PLANT-BASED CHEESE NEEDS A MELTOVER

Despite the interest and advancements, key gaps remain, particularly in solid plant-based cheeses, where issues with meltability, stretch and flavor continue to hinder broader acceptance. In fact, 73% of consumers would like a better plant-based cheese alternative that tasted like regular cheese, melted well and didn't have a grainy texture.[8] Taste, in particular, is a critical motivator for purchasing dairy alternatives—39% of consumers say they would be motivated to buy a dairy alternative if it tastes indistinguishable from dairy, and 33% cite having the same texture as dairy as important.[14]

Consumer desire for organic and non-GM products brings about regulatory considerations. Organic compliance and non-GM Project Verified certification are important to stay relevant in today's market.

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MEETING THE DEMANDS OF TODAY'S PLANT-BASED DAIRY MARKET

Improving taste, functionality and labeling are paramount to staying relevant in today's plant-based dairy market. Enzymes offer a way to meet these challenges and close the gap between non-dairy beverages and traditional dairy drinks, making it possible for plant-based products to mimic 'real' milk.

As a leading global enzyme manufacturer, Amano Enzyme can assist you with solutions for your plant-based dairy products. Our enzymes improve key features from flavor to functionality and get your non-dairy drinks and cheeses to market faster.

PLANTS UNLIMITED™ ENZYME PORTFOLIO

PG500: Aids in protein stability and prevents curdling in acidic beverages—like coffee—without acidity regulators.

VeraMax™ G3: Creates natural sweetness in cereal-based non-dairy beverages without increasing sugar content.

VeraMax™ G2 and Kleistase: Useful for liquefaction and saccharification. Also enables sugar profile control in cereal-based beverages.

CheeseMax™ PB: Modifies plant-based proteins to improve melt and stretch in plant-based cheese, targeting functionality gaps in the category.

CHEESE

- Create high-protein plant-based cheese by improving the interaction of plant proteins with hydrocolloids in the cheese matrix
- Maintain creamy texture and robust flavor
- Modify proteins to improve melt, stretch and overall texture

BEVERAGES

- Improve foaming performance
- Consistent mouthfeel
- Prevents curdling
- Aid in protein stability, especially in low pH such as coffee
- Naturally enhance sweetness and enable sugar profile control

40%

of Gen Zers (ages 18-24) report that when food shopping, the presence of GMOs affect their decision on what to buy most or all of the time.[15]

ORGANIC AND NON-GM COMPLIANT SOLUTIONS

As a leader in **non-GM compliant enzyme solutions**, we have the organic and non-GM labeling compliance toolbox for plant-based dairy, offering gluten-free, customizable innovations that enhance functionality across a range of plant-based applications. We can help you meet organic-compliant EU regulations (EU2018/848), and in the U.S., we offer a non-GM compliance affidavit (Non-GMO Project) per request. Amano's enzymes help create plant-based beverages and cheese that are more closely aligned with consumer trends in health-conscious living and responsible food production.

Tap into Amano Enzyme's diverse range of enzyme products and innovations to enhance your own plant-based dairy product development. Through collaboration and customization and a focus on innovation and quality, we work with you to deliver the perfect balance of texture, sweetness and stability in oat, almond, soy and other plant-based drinks.

Partner with Amano Enzyme and Explore Unlimited Possibilities

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