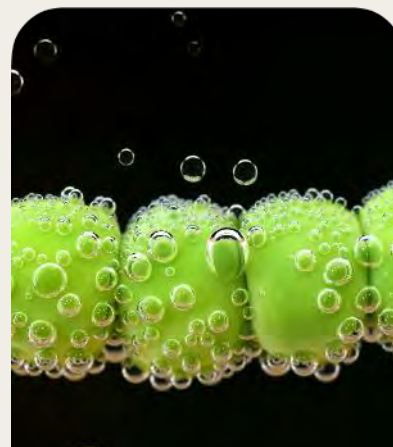
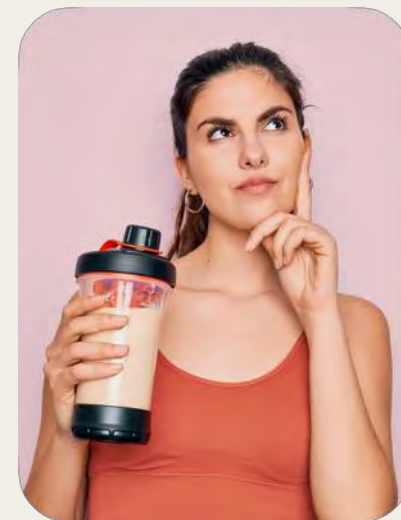




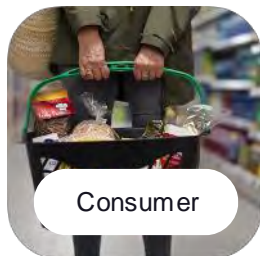
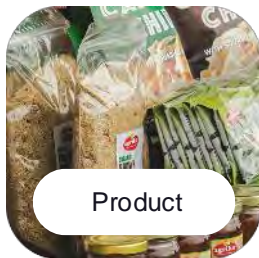
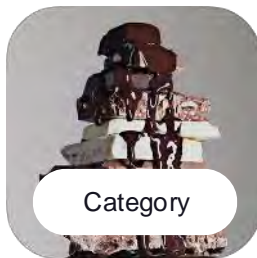
# WEBINAR

## Top F&B Trends 2026, Dairy focus for Midwest Dairy, December 3, 2025

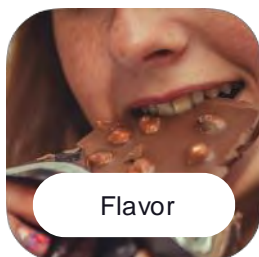
Presented by: Tom Vierhile, Innova Market Insights  
VP Strategic Insights, North America, [tom@innovami.com](mailto:tom@innovami.com)



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**90%**  
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Globally

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**AI**  
Enhanced  
Platform



# INSPIRE INNOVATION DRIVE GROWTH





# INSPIRE INNOVATION DRIVE GROWTH



**Today's focus: the six most relevant "Top Trends" for dairy**

# Trend 1

## POWERHOUSE PROTEIN



TREND 1  
POWERHOUSE  
PROTEIN

Protein plus    High absorption    Weight control

Protein remains a wellness powerhouse; consumers are seeking it for overall health in various formats and occasions.

Sources: Innova Trends Survey 2026 (Average of Brazil, Canada, China, France, Germany, India, Indonesia, Mexico, Spain, UK, US), Innova Database

Notes: Q1: “Are you actively including or reducing the following components in your diet?” – Protein. Q2: “Have you controlled your protein intake to improve the following physical health areas in the past 12 months?” Q3: “Have you controlled your protein intake to improve the following mental health areas in the past 12 months?” \*Health claims include hair support, oral health, weight management, anti-aging/aging-well, digestive/gut health, heart health, bone health, energy/alertness, immune health, brain health, eye health, joint health, and skin health

3 in 5

“ Consumers globally say:  
I actively include **more protein** in my diet

+32%

Growth in new F&B launches tracked featuring **protein and at least one health\* claim**  
Global, YoY Jul 2023-Jun 2024 vs. Jul 2024-Jun 2025



With kefir cultures. 5g creatine per serving. **20g protein per serving**. The perfect choice before a workout, recovering afterward or **supporting strength and gut health** anytime.



## TREND 1 POWERHOUSE PROTEIN

Opportunity ahead: Weight management in protein innovation.

Sources: Innova Trends Survey 2026 (Average of Brazil, Canada, China, France, Germany, India, Indonesia, Mexico, Spain, UK, US), Innova Database. Oikos [\(1\)](#), [\(2\)](#)

Note: Q: "Have you controlled your protein intake to improve the following physical health areas in the past 12 months?"

Top Trends  
Top 10 F&B Trends 2026 - Global - Nov 2025.

“ I managed my **protein intake** to improve the following aspects:

Consumers globally



Sport Performance/Recovery



Immunity



**WEIGHT**

“

Oikos Fusion drinks are specifically designed to help the nutritional needs of **GLP-1 users**.

— Oikos

**Danone's Oikos Protein Shake**

Designed to help build and retain muscle mass during **weight loss**.



United States, Aug 2025

Only **5%**

of new F&B launches tracked with **protein claims** that also feature **weight management claims**

Global, Jul 2024-Jun 2025

Emerging

**+29%** ↑

Growth in new F&B launches tracked with **protein and weight management claims**

Global, YoY Jul 2023-Jun 2024  
vs. Jul 2024-Jun 2025

# Trend 2

## GUT HEALTH HUB







# TREND 2

## GUT HEALTH HUB

- Gut first
- Fiber
- Microbiome

Consumers increasingly see gut health as the gateway to holistic wellness, sparking demand for benefits across body and mind.

Sources: Innova Database, Innova Trends Survey 2026 (Average of Brazil, Canada, China, France, Germany, India, Indonesia, Mexico, Spain, UK, US), Innova Database

Notes: Q: "To what extent do you agree with the following statements?" % of consumers who answered "strongly agree."

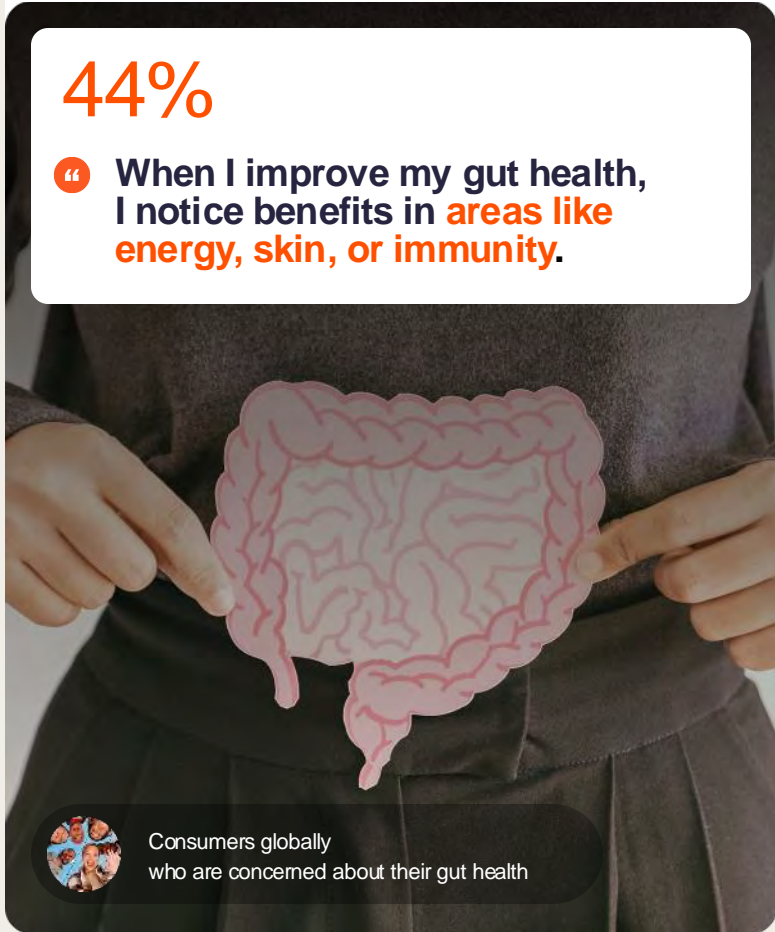
Top Trends  
Top 10 F&B Trends 2026 - Global - Nov 2025.

59%

“ Gut health is very important for my **whole body**.

44%

“ When I improve my gut health, I notice benefits in **areas like energy, skin, or immunity**.



Consumers globally who are concerned about their gut health

+42%

Growth in new F&B launches tracked with **gut/digestive health claims**

Global, YoY Jul 2023-Jun 2024 vs. Jul 2024-Jun 2025



Fresh and mild.  
**Digestive** well-being and **immunity**.

🌐 France, Oct 2025

TREND 2  
GUT HEALTH HUB

Consumers globally see a strong connection between gut health, weight, and stress.

Sources: Innova Trends Survey 2026 (Average of Brazil, Canada, China, France, Germany, India, Indonesia, Mexico, Spain, UK, US), Innova Database

Notes: Q: "Which of these physical/mental health aspects do you think are related to gut health?" (Select all that apply)

“Top **physical health aspect** related to gut health”



“Top **mental health aspect** related to gut health”



Fat burning yogurt drink with BE80 bifidobacteria. It **regulates your digestive system while promoting fat burning.**

🌐 Japan, Sep 2025

Consumers globally who are concerned about their gut health

WEIGHT  
MANAGEMENT

59%

STRESS  
RELIEF

53%

IMMUNE  
STRENGTH

BETTER  
SLEEP

SLEEP QUALITY

EASING OF ANXIETY



Good for your gut.  
**Everyday stress support.**

🌐 United States, Oct 2025

# Trend 3

## LAYERS OF DELIGHT





TREND 3  
LAYERS OF  
DELIGHT

- Multisensory
- Mood-boosting
- Texture play

Indulgence is evolving into a multidimensional experience; elevating the moment and mood, and combining sensory richness with well-being.

Sources: Innova Trends Survey 2026 (Average of Brazil, Canada, China, France, Germany, India, Indonesia, Mexico, Spain, UK, US), Innova Database

Notes: Q: “What does an indulgent food or drink experience mean to you?” (Select all that apply) – 39% of consumers say “a comforting moment”; 35% say “something that improves my mood”; 34% say “rich sensory enjoyment”; 34% say “a healthier enjoyment”

Top Trends  
Top 10 F&B Trends 2026 - Global - Nov 2025.

Consumers globally

4 pillars of indulgence

→

+26%

↑

Growth in new F&B launches tracked with indulgent claims

Global, YoY July 2023-Jun 2024 vs. Jul 2024-Jun 2025

“

Comforting moments

As calming as it is flavorful.

United States, Jun 2025

“

Mood-enhancing

Delicious taste that will lift your spirits.

Japan, Jul 2025

“

Rich sensory enjoyment

An exploration of color and flavor.

United States, Aug 2025

“

Healthier enjoyment

Pioneering healthier sweets.

Australia, Aug 2025

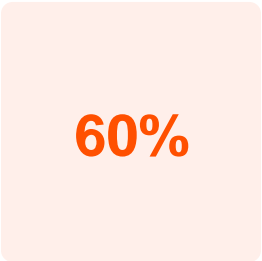
TREND 3  
LAYERS OF  
DELIGHT

Both familiar sensations and novel inventions win indulgence seeker.

Sources: Innova Trends Survey 2026 (Average of Brazil, Canada, China, France, Germany, India, Indonesia, Mexico, Spain, UK, US), Innova Database

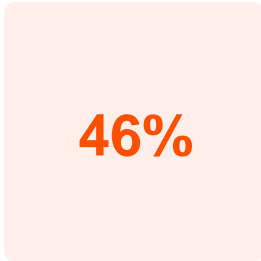
Notes: Q: “To what extent do you agree with the following statements?” % of consumers who answered “agree” & “strongly agree”

Top Trends  
Top 10 F&B Trends 2026 - Global - Nov 2025.



“ Consumers globally

I want to **explore new** things when I try to indulge.



“ Consumers globally

I always **go for the same option** when I try to indulge.



**Matcha-flavored bread** with **creamy cheese filling** for an **unexpected indulgent twist.**

🌐 Japan, Oct 2025



+46%

Indulgent F&B launches tracked with a **new experience** claim

Global, YoY July 2023-Jun 2024  
vs. Jul 2024-Jun 2025

+107%

Indulgent F&B launches tracked with a **comfort** claim

Global, YoY July 2023-Jun 2024  
vs. Jul 2024-Jun 2025



**Indulgent chocolate-dipped waffle baskets** made using a **traditional Danish recipe.**

🌐 Denmark, Sep 2025

# Trend 4

## BEVERAGES WITH PURPOSE





TREND 4  
BEVERAGES  
WITH PURPOSE

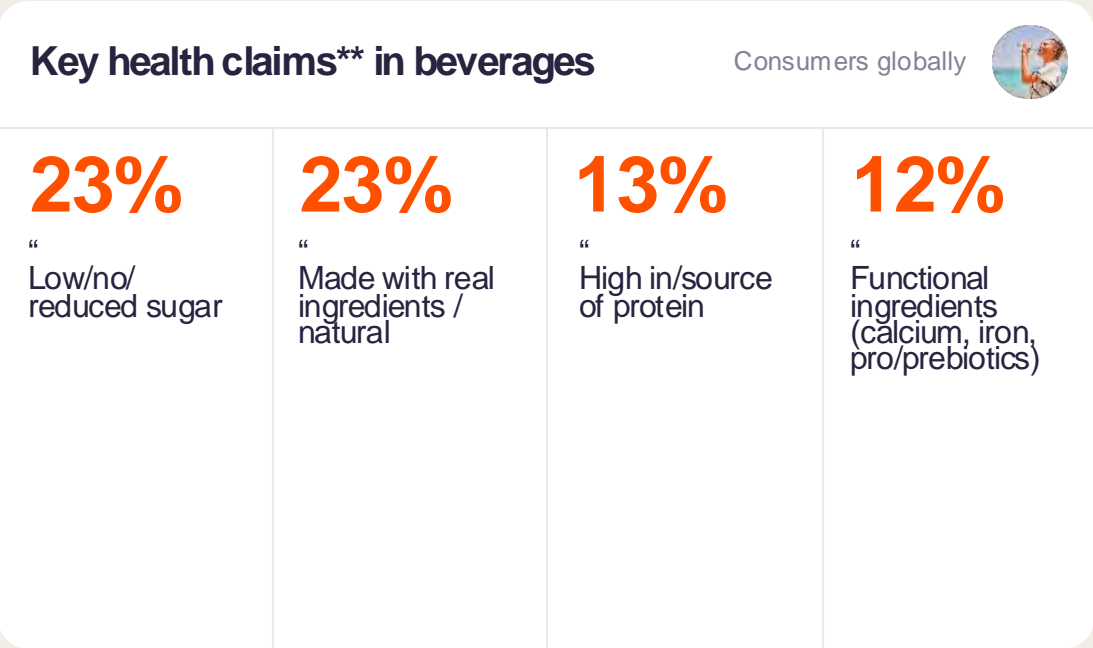
Liquid innovation   Hydration   Prebiotics

Beverages are leading innovation in wellness, with products tailored for hydration, convenience, and functionality.

Sources: Innova Category Survey 2025  
(Average of 35 countries), Innova Database

Notes: Q1: “Why have you increased your consumption of ...?” Q2: “Which claims most influence your purchasing decision when buying ...?” \*Beverage categories are: Bottled water; carbonated beverages; energy drinks; hot coffee; hot tea; iced coffee; iced tea; juices, juice drinks & smoothies; milk & flavored milk drinks; non-dairy milk/non-dairy milk drinks. \*\*Health claims include reduced claims (sugar/fat/salt, etc.) or added benefit claims

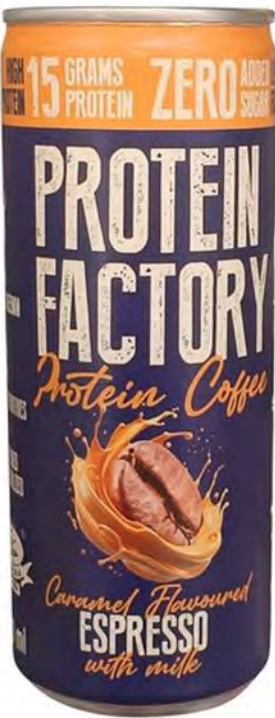
Top Trends  
Top 10 F&B Trends 2026 - Global - Nov 2025.



Sugar reduction	18%
Natural	8%
High protein	5%
Vitamins/minerals	4%

of new drink launches\* tracked with selected claims

Global, Jul 2024-Jun 2025



15g of protein. No added sugar.  
60mg natural caffeine. “Guilt-free energy and recovery in every sip.”

South Africa, Oct 2025

# TREND 4 BEVERAGES WITH PURPOSE

Health and indulgence  
are inseparable elements  
in beverage innovation.

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

Notes: Q1: “Which snack categories do you  
associate with the following types of snacks?”  
Q2: “Which snack categories do you associate  
with the following types of snacks?”

Top Trends  
Top 10 F&B Trends 2026 - Global - Nov 2025.

Drinks that are perceived  
as a **“healthy snack”**



United States, Aug 2025



Consumers globally

Drinks that are perceived as  
an **“indulgent snack”**

Dairy-based drinks



Juices & smoothies



Hot drinks



Carbonates & energy drinks



Soda with benefits

Prebiotics Vitamins Minerals

United States, May 2025

**+51%**

Growth in new carbonate & energy  
drink launches with  
a **prebiotic claim**

Global, CAGR Jul 2020-Jun 2025

# Trend 6

## MADE FOR MOMENTS





TREND 6  
MADE FOR  
MOMENTS

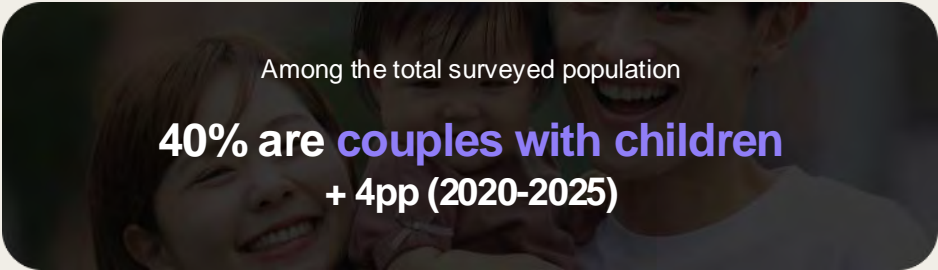
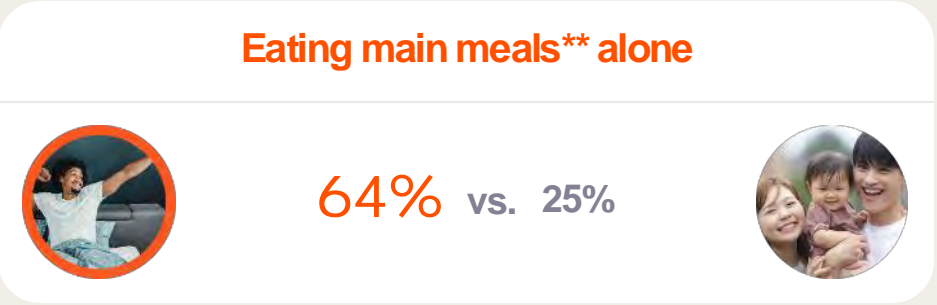
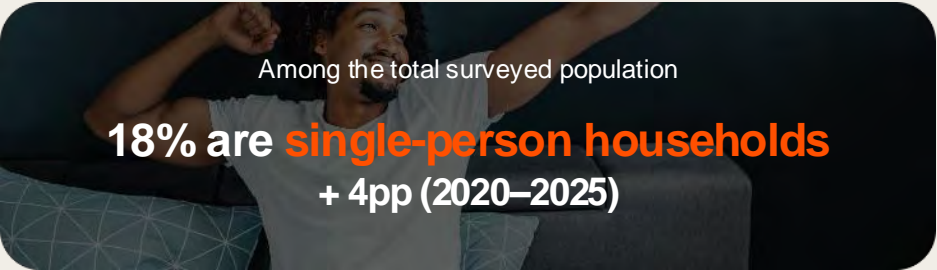
- Occasions
- Snacking
- Convenient formats

Occasion-based innovation is expanding through diverse formats in snacks, fresh meals, and single-serve offerings.

Sources: Innova Lifestyle & Attitudes Survey 2020 and 2025 (Average\* of Brazil, China, France, Germany, India, Indonesia, Mexico, Spain, UK, US), Innova Database

Notes: Q1: "Please specify your household composition." Q2: "How do you spend your time on the following eating occasions usually?"

\*Main meals are the average of breakfast, lunch, and dinner \*\*Canada is excluded from 2025 data for comparability with 2020 data, which didn't include Canada



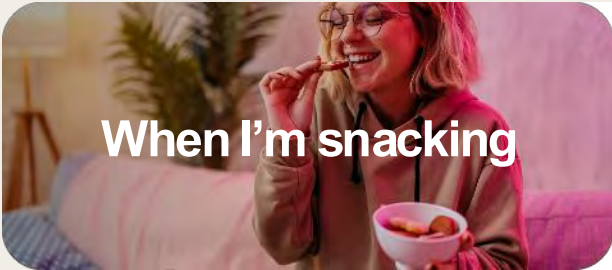
TREND 6  
MADE FOR  
MOMENTS

Diverse snacking needs are driving innovation across different occasions.

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

Note: Q1: “How do you spend your time on the following eating occasions usually?”

Top Trends  
Top 10 F&B Trends 2026 - Global - Nov 2025.



When I’m snacking

51%



Consumers from single households

Snack alone

41%



Couples with children

Snack with others

Snacks for enjoyment



Enjoy a **cheesy, satisfying crunch** at family movie nights, for lunch snacks, snack spreads or as an afternoon snack.

United States, Sep 2025

Snacks (and desserts) for function



Nutritionally optimized so you can eat it everyday, Gym Bod is a **new way to refuel**.

Australia, Oct 2025

Snacks for sharing



**Sharing made easy.** “Ideal for impromptu gatherings, game night, or after school snacking.”

United States, Dec 2024



# Trend 10

## JUSTIFIED CHOICES







# TREND 10 JUSTIFIED CHOICES

- Sustainability
- Communities
- Transparency

Sustainability remains a tiebreaker; it wins when it feels tangible, transparent, and truthful.

Sources: Innova Trends Survey 2026 (Average of Brazil, Canada, China, France, Germany, India, Indonesia, Mexico, Spain, UK, US), Innova Database

Notes: Q1: "How important is sustainability for you when buying food and drinks?" % of consumers who answered "agree" & "strongly agree." Q2: "What would make a higher price for a sustainable product feel justified to you?"

Top Trends  
Top 10 F&B Trends 2026 - Global - Nov 2025.

2 in 5

“ Consumers globally say:  
**Sustainability is important** when buying food and drinks.

+13%

**Growth in new F&B launches tracked with human-related claims**

Global, YoY July 2023-Jun 2024  
vs. Jul 2024-Jun 2025

Consumers are more accepting of premium prices for sustainable products when brands demonstrate...

Consumers globally who are concerned about sustainability

1 “  
Support for local farmers or communities

2 “  
Environmental protection

3 “  
Improved product quality or taste

4 “  
Sustainable packaging



**Fairtrade-certified cocoa. Ethically sourced. On a mission to end child labor in chocolate.**

United States, Oct 2025

# TREND 10 JUSTIFIED CHOICES

New product development is aligning with consumer-preferred practices.

Sources: Innova Trends Survey 2026 (Average of Brazil, Canada, China, France, Germany, India, Indonesia, Mexico, Spain, UK, US), Innova Database

**Note:** Q: “What would make a higher price for a sustainable product feel justified to you?”

Top Trends  
Top 10 F&B Trends 2026 - Global - Nov 2025.

1

“**Support for local farmers or communities**



**From 100% grass-fed cows on  
small family farms that restore  
the environment.**

France, Aug 2025

2

“**Environmental protection**



This delicious milk comes from farmers leading the way in **regenerative farming methods**, with herds that spend their days roaming Trewithen's coastal grassland...

United Kingdom, Aug 2025

3

“  
**Improved product  
quality or taste**



Meadow milk from cows that graze in the meadow **at least 120 days a year, at least 6 hours a day. Rainforest Alliance** people and nature-certified cocoa.

 Netherlands, Sep 2025



## INNOVA'S TOP TRENDS 2026, focus on Dairy - Summary



### Powerhouse Protein

Protein remains a **wellness powerhouse**; consumers are seeking it for overall health in various formats and occasions.



### Gut Health Hub

Consumers increasingly see gut health as the **gateway to holistic wellness**, sparking demand for benefits across body and mind.



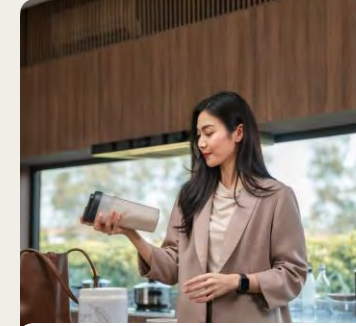
### Layers of Delight

Indulgence is evolving into a **multi-dimensional experience**; elevating the moment and mood and combining sensory richness with well-being.



### Beverages with Purpose

Beverages are **leading innovation in wellness**, with products tailored for hydration, convenience, and functionality.



### Made for Moments

**Occasion-based innovation** is expanding through diverse formats in snacks, fresh meals, and single-serve offerings.



### Justified Choices

**Sustainability** remains a **tiebreaker**; it wins when it feels tangible, transparent, and truthful.





## **INNOVA'S** Five Key CONSUMER TRENDS for 2026



### **Relaxed Sociability**

More flexible and healthier lifestyles are driving the shift to **lighter, more relaxed social occasions and spaces.**



### **Time for me**

Consumers are **actively choosing to spend time alone** to focus on self-care, lift mood and restore themselves physically and mentally.



### **Vitality & Longevity**

Consumers are more focused than ever on what they can do **now** to **optimize their health for the future.**



### **My Tech Mate**

**AI** is quickly being adopted by consumers to **simplify and enrich many aspects of their lives**, though trust and privacy are concerns.



### **Simplified Life**

Faced with stress and complexity, consumers want ways to **simplify their lives** and achieve a **healthy, balanced lifestyle.**



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# QUESTIONS?



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THANK YOU