

Dairy-Free Ice Cream Market Forecasts to 2032 – Global Analysis By Product (Pints & Tubs, Novelties, Bars, Sandwiches and Other Products), Source, Flavor, Category, Distribution Channel and By Geography

<https://marketpublishers.com/r/D0D8D637CF0AEN.html>

Date: November 2025

Pages: 200

Price: US\$ 4,150.00 (Single User License)

ID: D0D8D637CF0AEN

Abstracts

According to Statistics MRC, the Global Dairy-Free Ice Cream Market is accounted for \$4.5 billion in 2025 and is expected to reach \$11.3 billion by 2032 growing at a CAGR of 14.2% during the forecast period. Dairy-free ice cream is a frozen dessert made without traditional dairy ingredients, using plant-based alternatives such as almond milk, coconut milk, soy milk, oat milk, or cashew milk. It is crafted to replicate the creamy texture and indulgent taste of conventional ice cream while catering to consumers with lactose intolerance, dairy allergies, or those following vegan and plant-based diets. Often enriched with natural flavors, fruits, nuts, and clean-label ingredients, dairy-free ice cream offers a healthier, sustainable option. It combines innovation with indulgence, meeting modern demands for ethical, allergen-free, and environmentally conscious food choices.

Market Dynamics:

Driver:

Rising Veganism & Plant-Based Diets

Rising veganism and the adoption of plant-based diets are major drivers of the dairy-free ice cream market. Consumers increasingly seek ethical, sustainable, and health-conscious alternatives to traditional dairy products. Dairy-free ice cream, made from almond, coconut, soy, oat, or cashew milk, aligns perfectly with these preferences. Its

appeal extends beyond vegans to flexitarians and lactose-intolerant individuals, broadening the consumer base. As plant-based lifestyles gain global traction, demand for indulgent yet sustainable frozen desserts continues to accelerate, fueling strong market growth.

Restraint:

High Production Costs

High production costs act as a restraint in the dairy-free ice cream market. Plant-based ingredients such as almond, cashew, and oat milk are often more expensive than traditional dairy, while specialized processing adds further costs. Maintaining creamy texture and flavor requires advanced formulations and premium inputs, raising retail prices. This cost barrier limits accessibility, particularly in price-sensitive regions. Without cost-effective innovations, adoption may remain concentrated among affluent consumers, slowing broader market penetration.

Opportunity:

Innovation in Plant-Based Ingredients

Innovation in plant-based ingredients presents a significant opportunity for the dairy-free ice cream market. Advances in formulations using oat, coconut, and cashew milk enhance creaminess, flavor, and nutritional value, making products more appealing to mainstream consumers. Functional ingredients such as probiotics, protein fortification, and clean-label sweeteners further expand product diversity. These innovations allow brands to differentiate themselves while meeting evolving consumer demands for indulgence and wellness. As ingredient technology continues to advance, the market benefits from greater accessibility.

Threat:

Taste & Texture Challenges

Taste and texture challenges remain a threat to the dairy-free ice cream market. Replicating the creamy mouthfeel and indulgent flavor of traditional dairy ice cream is difficult with plant-based alternatives. Some formulations may lack richness or leave aftertastes, limiting acceptance among mainstream consumers. Overcoming these sensory barriers requires continuous innovation in processing and ingredient blending.

Without improvements, consumer perception may hinder adoption, especially in competitive markets.

Covid-19 Impact:

The Covid-19 pandemic had mixed effects on the dairy-free ice cream market. Initially, supply chain disruptions and reduced consumer spending slowed growth. However, rising health awareness during the pandemic boosted demand for plant-based, allergen-free, and sustainable foods. Consumers increasingly turned to dairy-free ice cream as a healthier indulgence, supported by expanding e-commerce channels. Brands adapted with digital marketing and direct-to-consumer models, strengthening resilience. Post-pandemic recovery continues to emphasize wellness and sustainability, positioning dairy-free ice cream as a preferred choice.

The novelties segment is expected to be the largest during the forecast period

The novelties segment is expected to account for the largest market share during the forecast period, as products such as bars, cones, and sandwiches offer convenient, portion-controlled indulgence that appeals to a wide consumer base. Their popularity in retail and foodservice channels ensures strong demand, particularly among younger demographics seeking innovative, on-the-go options. With diverse flavors and formats, novelties dominate sales by combining convenience with indulgence. As plant-based novelties expand globally, this segment solidifies its position as the leading contributor to market revenues.

The chocolate segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the chocolate segment is predicted to witness the highest growth rate, because chocolate remains the most popular flavor worldwide, and its rich taste complements plant-based formulations, masking any texture or flavor limitations. Rising demand for indulgent yet allergen-free desserts drives growth in this category. Brands are innovating with premium cocoa, clean-label sweeteners, and functional inclusions to enhance appeal. As consumers increasingly seek familiar flavors in plant-based formats, chocolate emerges as the fastest-growing segment, fueling strong market expansion.

Region with largest share:

During the forecast period, the Asia Pacific region is expected to hold the largest market share, due to rising urbanization, growing disposable incomes, and expanding awareness of plant-based diets drive demand across countries such as China, India, and Japan. Traditional lactose intolerance prevalence in many Asian populations further supports adoption. Local and international brands are actively introducing innovative flavors and formats tailored to regional tastes. With strong cultural acceptance of plant-based foods and rapid retail expansion, Asia Pacific dominates market share during the forecast period.

Region with highest CAGR:

Over the forecast period, the North America region is anticipated to exhibit the highest CAGR, owing to region benefits from advanced retail infrastructure, high consumer awareness, and strong adoption of vegan and flexitarian lifestyles. Innovative startups and established brands continuously launch new plant-based flavors and formats, driving rapid growth. Rising demand for allergen-free, sustainable indulgence further accelerates adoption. With strong e-commerce penetration and premium product positioning, North America leads in growth momentum, reshaping frozen dessert trends through dairy-free innovations during the forecast period.

Key players in the market

Some of the key players in Dairy-Free Ice Cream Market include Unilever, Tofutti Brands, Nestlé, Trader Joe's, General Mills, Alden's Organic, Danone, NadaMoo!, The Hain Celestial Group, Swedish Glace, Lotte Corporation, So Delicious Dairy Free, Valsoia S.p.A., Booja-Booja, and Bliss Unlimited.

Key Developments:

In October 2025, Nestlé India has entered into a memorandum of understanding with the Ministry of Food Processing Industries to accelerate its investment in greenfield and brownfield food-sector projects across Odisha and existing manufacturing sites over the next 2–3 years, as part of its US \$564 million expansion plan.

In June 2025, Nestlé has inked research collaborations aimed at pioneering sustainable aquaculture practices, seeking to advance innovative, eco-efficient farming techniques and boost responsible seafood production in support of global food-security and environmental goals.

Products Covered:

Pints & Tubs

Novelties

Bars

Sandwiches

Other Products

Sources Covered:

Almond

Rice

Soy

Cashew

Coconut

Oat

Other Sources

Flavors Covered:

Vanilla

Mixed/Berry Flavors

Chocolate

Mint

Strawberry

Coffee

Mango

Other Flavors

Categories Covered:

Organic

Conventional

Distribution Channels Covered:

Supermarkets & Hypermarkets

Online Retail

Convenience Stores

Specialty Stores

Foodservice

Regions Covered:

North America

US

Canada

Mexico

Europe

Germany

UK

Italy

France

Spain

Rest of Europe

Asia Pacific

Japan

China

India

Australia

New Zealand

South Korea

Rest of Asia Pacific

South America

Argentina

Brazil

Chile

Rest of South America

Middle East & Africa

Saudi Arabia

UAE

Qatar

South Africa

Rest of Middle East & Africa

What our report offers:

- Market share assessments for the regional and country-level segments
- Strategic recommendations for the new entrants
- Covers Market data for the years 2024, 2025, 2026, 2028, and 2032
- Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)
- Strategic recommendations in key business segments based on the market estimations
- Competitive landscaping mapping the key common trends
- Company profiling with detailed strategies, financials, and recent developments
- Supply chain trends mapping the latest technological advancements

Free Customization Offerings:

All the customers of this report will be entitled to receive one of the following free customization options:

Company Profiling

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

Regional Segmentation

Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)

Competitive Benchmarking

Benchmarking of key players based on product portfolio, geographical presence, and strategic alliances

Contents

1 EXECUTIVE SUMMARY

2 PREFACE

- 2.1 Abstract
- 2.2 Stake Holders
- 2.3 Research Scope
- 2.4 Research Methodology
 - 2.4.1 Data Mining
 - 2.4.2 Data Analysis
 - 2.4.3 Data Validation
 - 2.4.4 Research Approach
- 2.5 Research Sources
 - 2.5.1 Primary Research Sources
 - 2.5.2 Secondary Research Sources
 - 2.5.3 Assumptions

3 MARKET TREND ANALYSIS

- 3.1 Introduction
- 3.2 Drivers
- 3.3 Restraints
- 3.4 Opportunities
- 3.5 Threats
- 3.6 Product Analysis
- 3.7 Emerging Markets
- 3.8 Impact of Covid-19

4 PORTERS FIVE FORCE ANALYSIS

- 4.1 Bargaining power of suppliers
- 4.2 Bargaining power of buyers
- 4.3 Threat of substitutes
- 4.4 Threat of new entrants
- 4.5 Competitive rivalry

5 GLOBAL DAIRY-FREE ICE CREAM MARKET, BY PRODUCT

- 5.1 Introduction
- 5.2 Pints & Tubs
- 5.3 Novelties
- 5.4 Bars
- 5.5 Sandwiches
- 5.6 Other Products

6 GLOBAL DAIRY-FREE ICE CREAM MARKET, BY SOURCE

- 6.1 Introduction
- 6.2 Almond
- 6.3 Rice
- 6.4 Soy
- 6.5 Cashew
- 6.6 Coconut
- 6.7 Oat
- 6.8 Other Sources

7 GLOBAL DAIRY-FREE ICE CREAM MARKET, BY FLAVOR

- 7.1 Introduction
- 7.2 Vanilla
- 7.3 Mixed/Berry Flavors
- 7.4 Chocolate
- 7.5 Mint
- 7.6 Strawberry
- 7.7 Coffee
- 7.8 Mango
- 7.9 Other Flavors

8 GLOBAL DAIRY-FREE ICE CREAM MARKET, BY CATEGORY

- 8.1 Introduction
- 8.2 Organic
- 8.3 Conventional

9 GLOBAL DAIRY-FREE ICE CREAM MARKET, BY DISTRIBUTION CHANNEL

- 9.1 Introduction
- 9.2 Supermarkets & Hypermarkets
- 9.3 Online Retail
- 9.4 Convenience Stores
- 9.5 Specialty Stores
- 9.6 Foodservice

10 GLOBAL DAIRY-FREE ICE CREAM MARKET, BY GEOGRAPHY

- 10.1 Introduction
- 10.2 North America
 - 10.2.1 US
 - 10.2.2 Canada
 - 10.2.3 Mexico
- 10.3 Europe
 - 10.3.1 Germany
 - 10.3.2 UK
 - 10.3.3 Italy
 - 10.3.4 France
 - 10.3.5 Spain
 - 10.3.6 Rest of Europe
- 10.4 Asia Pacific
 - 10.4.1 Japan
 - 10.4.2 China
 - 10.4.3 India
 - 10.4.4 Australia
 - 10.4.5 New Zealand
 - 10.4.6 South Korea
 - 10.4.7 Rest of Asia Pacific
- 10.5 South America
 - 10.5.1 Argentina
 - 10.5.2 Brazil
 - 10.5.3 Chile
 - 10.5.4 Rest of South America
- 10.6 Middle East & Africa
 - 10.6.1 Saudi Arabia
 - 10.6.2 UAE
 - 10.6.3 Qatar
 - 10.6.4 South Africa

10.6.5 Rest of Middle East & Africa

11 KEY DEVELOPMENTS

11.1 Agreements, Partnerships, Collaborations and Joint Ventures

11.2 Acquisitions & Mergers

11.3 New Product Launch

11.4 Expansions

11.5 Other Key Strategies

12 COMPANY PROFILING

12.1 Unilever

12.2 Tofutti Brands

12.3 Nestl?

12.4 Trader Joe's

12.5 General Mills

12.6 Alden's Organic

12.7 Danone

12.8 NadaMoo!

12.9 The Hain Celestial Group

12.10 Swedish Glace

12.11 Lotte Corporation

12.12 So Delicious Dairy Free

12.13 Valsoia S.p.A.

12.14 Booja-Booja

12.15 Bliss Unlimited

List Of Tables

LIST OF TABLES

Table 1 Global Dairy-Free Ice Cream Market Outlook, By Region (2024-2032) (\$MN)

Table 2 Global Dairy-Free Ice Cream Market Outlook, By Product (2024-2032) (\$MN)

Table 3 Global Dairy-Free Ice Cream Market Outlook, By Pints & Tubs (2024-2032) (\$MN)

Table 4 Global Dairy-Free Ice Cream Market Outlook, By Novelties (2024-2032) (\$MN)

Table 5 Global Dairy-Free Ice Cream Market Outlook, By Bars (2024-2032) (\$MN)

Table 6 Global Dairy-Free Ice Cream Market Outlook, By Sandwiches (2024-2032) (\$MN)

Table 7 Global Dairy-Free Ice Cream Market Outlook, By Other Products (2024-2032) (\$MN)

Table 8 Global Dairy-Free Ice Cream Market Outlook, By Source (2024-2032) (\$MN)

Table 9 Global Dairy-Free Ice Cream Market Outlook, By Almond (2024-2032) (\$MN)

Table 10 Global Dairy-Free Ice Cream Market Outlook, By Rice (2024-2032) (\$MN)

Table 11 Global Dairy-Free Ice Cream Market Outlook, By Soy (2024-2032) (\$MN)

Table 12 Global Dairy-Free Ice Cream Market Outlook, By Cashew (2024-2032) (\$MN)

Table 13 Global Dairy-Free Ice Cream Market Outlook, By Coconut (2024-2032) (\$MN)

Table 14 Global Dairy-Free Ice Cream Market Outlook, By Oat (2024-2032) (\$MN)

Table 15 Global Dairy-Free Ice Cream Market Outlook, By Other Sources (2024-2032) (\$MN)

Table 16 Global Dairy-Free Ice Cream Market Outlook, By Flavor (2024-2032) (\$MN)

Table 17 Global Dairy-Free Ice Cream Market Outlook, By Vanilla (2024-2032) (\$MN)

Table 18 Global Dairy-Free Ice Cream Market Outlook, By Mixed/Berry Flavors (2024-2032) (\$MN)

Table 19 Global Dairy-Free Ice Cream Market Outlook, By Chocolate (2024-2032) (\$MN)

Table 20 Global Dairy-Free Ice Cream Market Outlook, By Mint (2024-2032) (\$MN)

Table 21 Global Dairy-Free Ice Cream Market Outlook, By Strawberry (2024-2032) (\$MN)

Table 22 Global Dairy-Free Ice Cream Market Outlook, By Coffee (2024-2032) (\$MN)

Table 23 Global Dairy-Free Ice Cream Market Outlook, By Mango (2024-2032) (\$MN)

Table 24 Global Dairy-Free Ice Cream Market Outlook, By Other Flavors (2024-2032) (\$MN)

Table 25 Global Dairy-Free Ice Cream Market Outlook, By Category (2024-2032) (\$MN)

Table 26 Global Dairy-Free Ice Cream Market Outlook, By Organic (2024-2032) (\$MN)

Table 27 Global Dairy-Free Ice Cream Market Outlook, By Conventional (2024-2032)

(\$MN)

Table 28 Global Dairy-Free Ice Cream Market Outlook, By Distribution Channel
(2024-2032) (\$MN)

Table 29 Global Dairy-Free Ice Cream Market Outlook, By Supermarkets &
Hypermarkets (2024-2032) (\$MN)

Table 30 Global Dairy-Free Ice Cream Market Outlook, By Online Retail (2024-2032)
(\$MN)

Table 31 Global Dairy-Free Ice Cream Market Outlook, By Convenience Stores
(2024-2032) (\$MN)

Table 32 Global Dairy-Free Ice Cream Market Outlook, By Specialty Stores (2024-2032)
(\$MN)

Table 33 Global Dairy-Free Ice Cream Market Outlook, By Foodservice (2024-2032)
(\$MN)

Note: Tables for North America, Europe, APAC, South America, and Middle East &
Africa Regions are also represented in the same manner as above.

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