



SYNERGY[®]
INSPIRING TASTE™

2026 TASTE TRENDS

European Dairy market:
Yoghurt, Ice Cream, Milk Alternatives



IN THIS REPORT

Throughout this report, created with support from Innova, we take a look at key trends in select dairy categories: yoghurts (dairy/non-dairy), ice cream (dairy/non-dairy) and dairy alternative drinks across Western and Eastern Europe.

Covering the last 3 years, we highlight emerging ingredient trends and product claims, giving a clear picture of what's shaping the 2025 market and what consumers are looking for.



2026 TRENDS

Consumers continue to take a holistic approach to their physical and mental well-being, offering a key opportunity for dairy companies to hit the sweet spot of health, taste and convenience.



TOP FLAVOURS

Consumers are seeking comfort in familiarity and tend to stick to what they know best when it comes to flavour choices. Despite this, we are witnessing a growing consumer appetite for unique and indulgent taste experiences in dairy products.



EXPERT CALL OUT

Pistachio flavoured products are rapidly growing in popularity across Europe, with consumers increasingly craving the unique and rich characteristics that this profile offers across multiple products.

13%

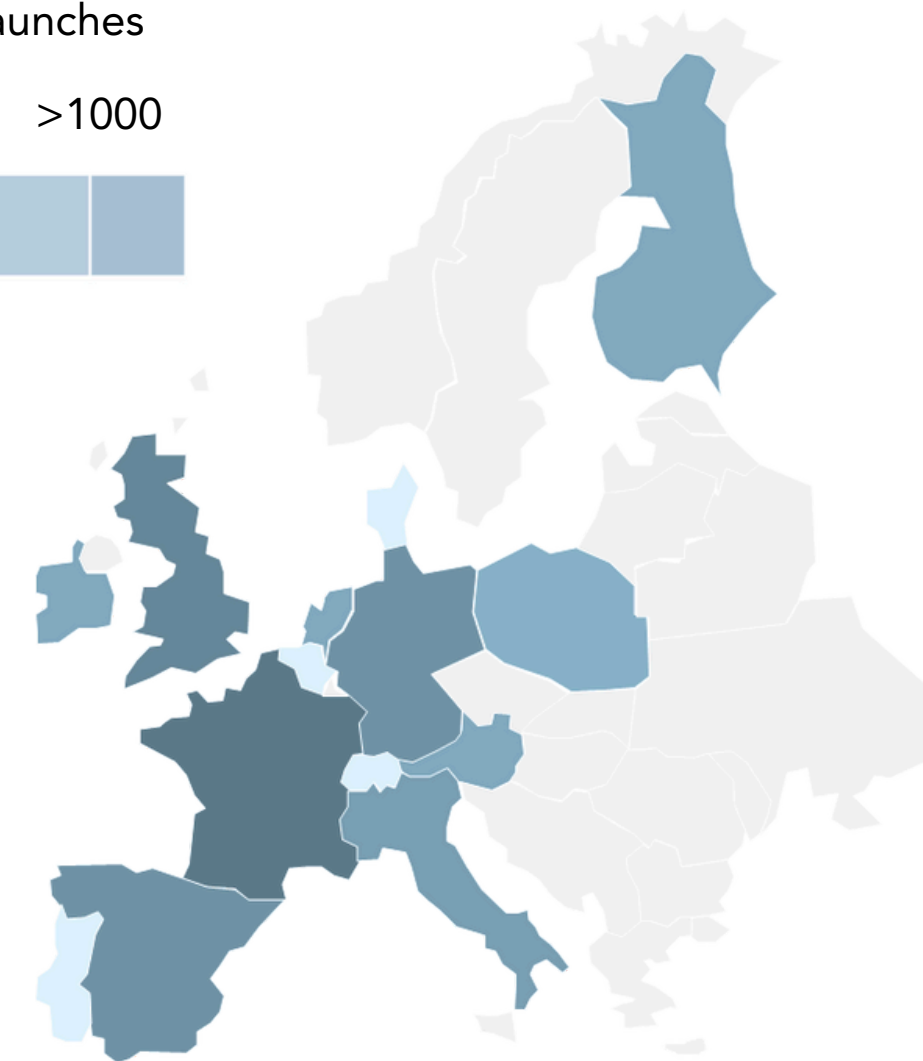
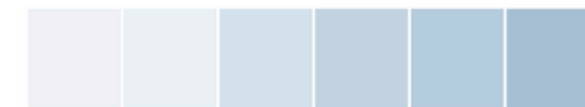
of dairy launches* are from France, the leading country in Europe

12%

of dairy launches* tracked in Europe come from the UK market

No. of product launches

<300 600 >1000



1 in 5

dairy launches* feature a high/source of protein claim, driven by the UK market

27%

Environmental welfare is leading lifestyle claim*, with plant-based claims also trending (17% CAGR)

*Oct 2023-Sept 2024

NPD Summary



Protein in the spotlight

High/Source of Protein and No Added Sugar claims have gained significant ground in the Dairy category with 30% and 14% CAGR respectively in the last 3 years. Driven by dairy yoghurts, activity in this space has been rampant as brands address consumers' quest for health-conscious products.



Fortification

In Europe, dairy trends continue to evolve with an increased focus on functional ingredients as consumers seek products that support gut health and immunity. Vitamins & Minerals are the fastest growing ingredient category within dairy, with probiotic yoghurts also witnessing strong consumer demand.



Sustainability

Consumers maintain their strong push towards being more environmentally conscious, driving demand for products that focus on reduced carbon footprints, ethical sourcing and eco-friendly packaging. Cleaner declarations on back of packs are also benefiting from this trend.

Crème Brûlée
S'mores
Chocolate Fudge
Macadamia Nut
Cinnamon Bun
Papaya
Speculoos

INTRODUCTION

Growth in product launches over the last year is high or the flavour is highly mentioned on social media

Passion Fruit
Tiramisù
Pistachio
Brownie
Forest (Mixed) Berry
Coffee
Pear
Peanut
Honey

GROWTH

Appearance in product launches has been growing over the past 2 years

Almond
White Chocolate
Lemon
Cocoa
Coconut
Banana
Pineapple
Cherry
Stracciatella
Dark Chocolate
Lime

MATURE

Appearance in product launches has been growing over the last 5 years

Strawberry
Vanilla
Peach
Blueberry
Caramel
Hazelnut
Salted Caramel
Milk Chocolate
Mango
Red Raspberry

PROVEN FAVOURITES

Appeared within top 15 NPD over the last 5 years

TRENDING FLAVOURS

Classic profiles continue to be the top choice for consumers, remaining the backbone of dairy products as people seek comfort in familiar flavours; however, there is also growing demand for rich, indulgent and novel taste experiences that cater to the desire of guilt-free options.

Pistachio's popularity in Europe is growing as consumers seek indulgent flavours. Its nutty profile, creamy texture and vibrant green colour add to its versatility. In dairy products, pistachio adds a slightly sweet flavour, complementing other flavours. This makes it a top choice for indulgent treats like ice creams, desserts and yoghurts.

JAMIE BLAKE
EUROPEAN DAIRY/SWEET GOODS CATEGORY
MANAGER

KEY STATS

10%

growth in social media discussions regarding pistachio in the past 12 months₁

60%

growth in pistachio google searches since 2019₂

DID YOU KNOW?



Pistachios are packed with nutrients! They're a great source of protein, fibre, healthy fats and antioxidants as well as a low calorie nut. They were first cultivated over 9,000 years ago!

FLAVOUR SPOTLIGHT



PISTACHIO

Pistachios originate from the tree *Pistacia vera*, native to regions of Central Asia and the Middle East. Known for its distinct green colour and rich, slightly sweet, and nutty flavour, pistachio is the perfect profile when seeking permissible indulgence.

LATEST NPD



Pistachio Yoghurt Dessert,
Austria



Roasted Pistachio Ice
Cream, UK



Pistachio Greek Yoghurt,
Italy

SOCIAL MEDIA DAIRY TRENDS



Upping the protein content

Platforms like TikTok have fuelled a surge in interest for high protein foods stemming from the health and wellness trend. This digital craze has led to a growing demand for added protein in dairy goods. UK retailer Tesco saw a 34% rise in sales for such items with many leading players in the European yoghurt market reporting strong sales growth as a result of their high-protein product range.



Kefir and gut health

In January 2024, global traffic related to gut health hitting an all-time high. Focus on gut health reached a new milestone, with 37% of people ranking it as their primary health concern. Health and wellness influencers have capitalized on this, creating content that includes gut-friendly recipes and kefir product recommendations, aimed at improving gut health.



Guilt-free indulgence

Consumers are seeking indulgent yet nutritious dairy options to satisfy cravings with health remaining top of mind. Brands like Trufu are experiencing virality in this space, their UK launch of chocolate & yoghurt topped fruit racked up 1.3 million views, showcasing sweet treats with a nutritious spin. Yoghurt bowls have also become popular, with influencers like @ppchicc showcasing dried yogurt and reaching 35 million views.



The trends in numbers

Kefir was searched **80,000** times in January on Tesco's online platform

#GutHealthMatters has been used over **146,000** times on TikTok videos

@ppchicc dried yoghurt video has over **35 million** views



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EUROPEAN CATEGORY DEVELOPMENT
MANAGER - DAIRY AND SWEET GOODS

Feeling Inspired?

At Synergy, we're passionate about turning insights into innovation. Using a blend of art, science and insight Synergy can help their customers to navigate the changing demands of the marketplace with products that stand out from the crowd.

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