

# Signals of Change: What's Next for Global Dairy Consumption



U.S. DAIRY  
EXPORT COUNCIL



Use QR code to submit questions

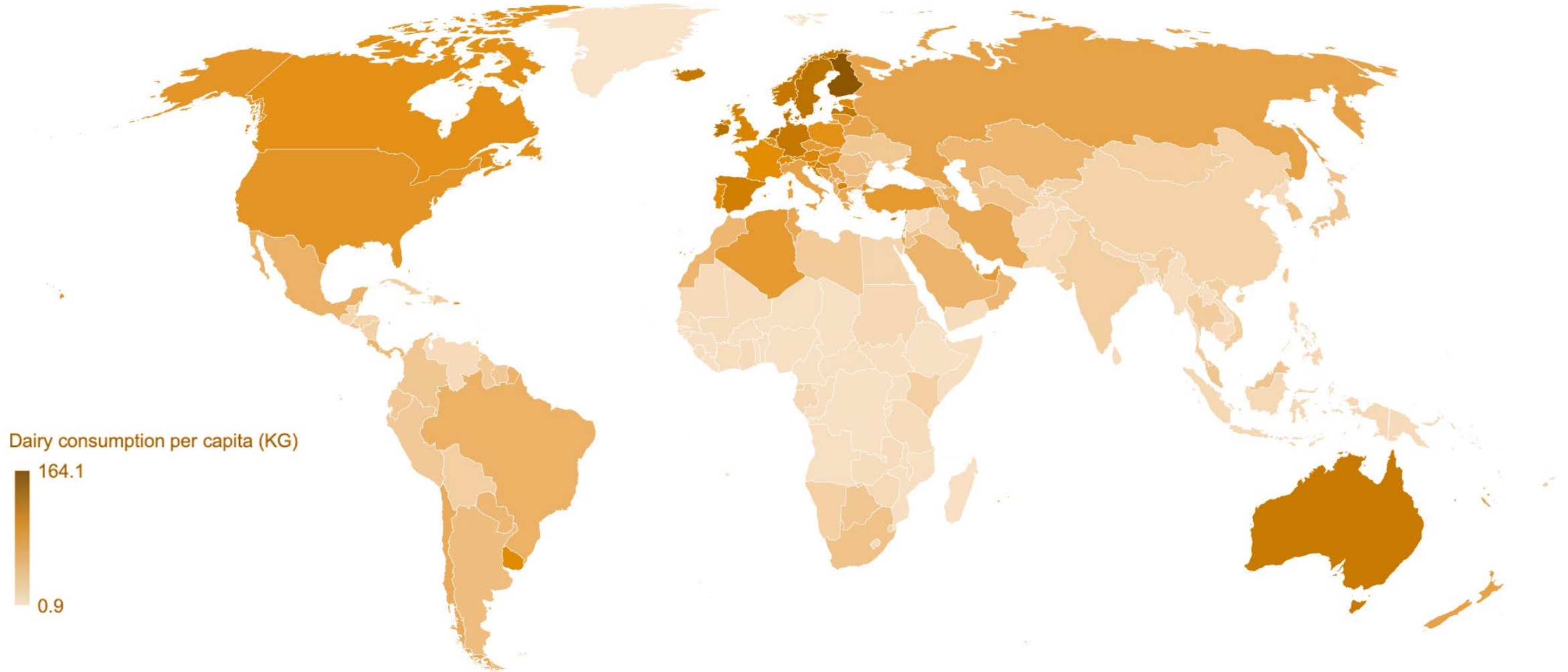
**Rick Ortman**, senior vice president, strategic insights, USDEC

**Megan Sheets**, vice president, strategic development, USDEC



# The Spectrum of Market Development: Uneven Paths to Growth

# Dairy per capita consumption varies across the globe.



# Structural Indicators of Dairy Market Development

Correlation with Per Capita Dairy Consumption



GDP Per Capita

Strong Positive Signal



Median Age

Very Strong Positive Signal



Birth Rate

Strong Inverse Signal

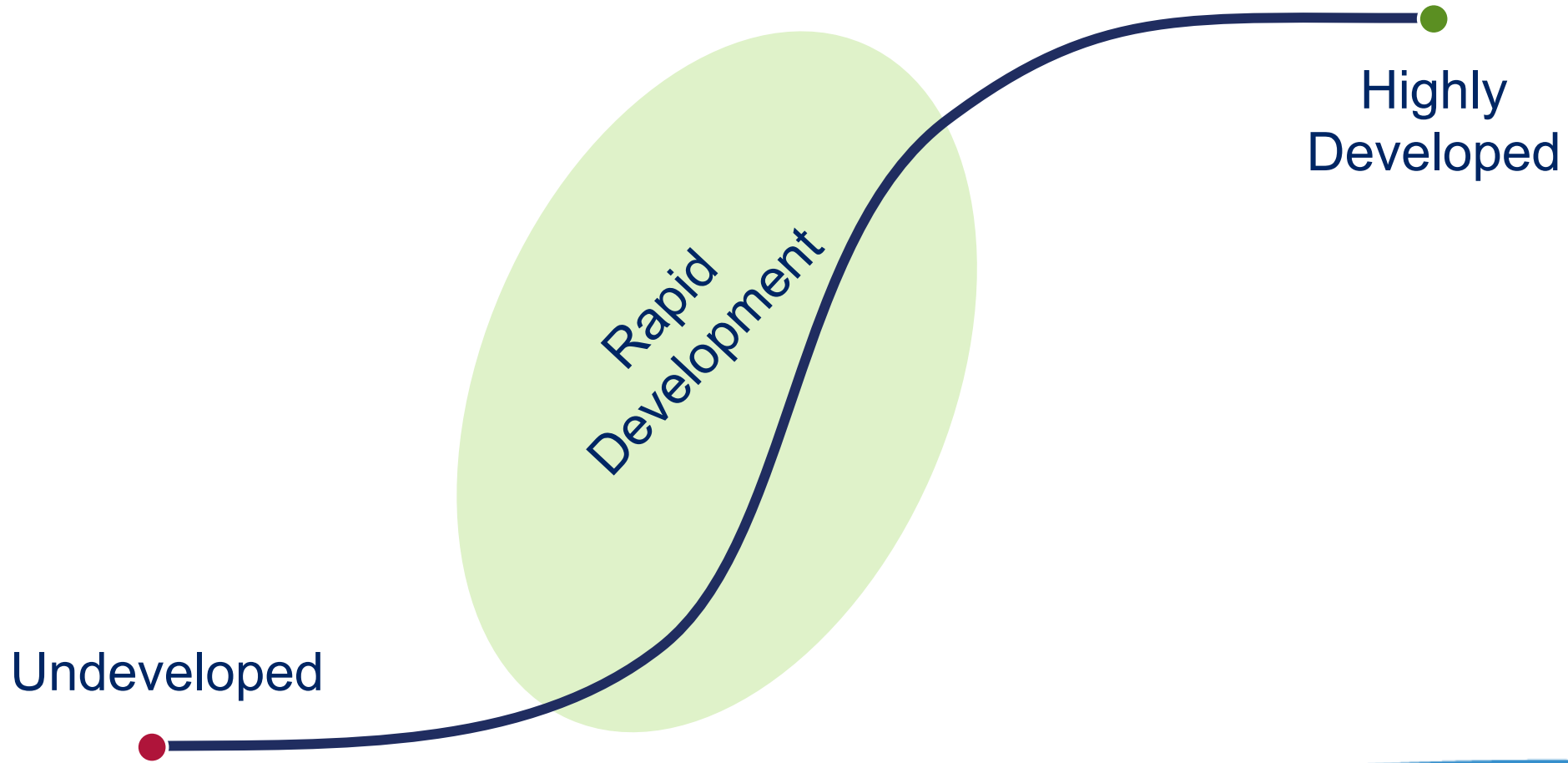


Household Size

Strong Inverse Signal



# Dairy consumption evolves as markets move along the curve.



# EARLY CURVE: The Philippines

# EARLY CURVE: The Philippines



Dairy Per Capita Consumption **9.2**

GDP Per Capita <b>\$4,230</b>	Birth Rates (per '000 population) <b>15.8</b>	Average HH Size <b>3.9</b>	Median Age of Population <b>27.1</b>
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**COST-SENSITIVE SHOPPING**



**CONVENIENCE-LED MEALS**



**DAIRY FOR NUTRITIONAL SUFFICIENCY**

Source: Euromonitor Passport, USDEC analysis, Consumer Lifestyles report June 2025



# MID-CURVE: Mexico



Dairy Per Capita Consumption **55**

GDP Per Capita <b>\$14,108</b>	Birth Rates (per '000 population) <b>13.8</b>	Average HH Size <b>3.4</b>	Median Age of Population <b>30.3</b>
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**TRADE DOWN  
BEHAVIOR AT RETAIL**



**PLANNED NUTRITION**



**DAIRY FOR A  
BALANCED DIET**

Source: Euromonitor Passport, USDEC analysis, Consumer Lifestyles report June 2025



# UPPER CURVE: Australia



Dairy Per Capita Consumption **121.3**

GDP Per Capita <b>\$65,859</b>	Birth Rates (per '000 population) <b>10.7</b>	Average HH Size <b>2.5</b>	Median Age of Population <b>38.5</b>
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**DIGITAL & DATA-LED FOOD DECISIONS**



**VALUES SHAPE CHOICES**



**DAIRY SUPPORTS PERFORMANCE GOALS**

Source: Euromonitor Passport, USDEC analysis, Consumer Lifestyles report June 2025





# The Birthplace of Trends: Local Signals, Global Scale



**Food & beverage trends are born locally, break out of niche, and scale across global markets.**

**BIRTHPLACE**

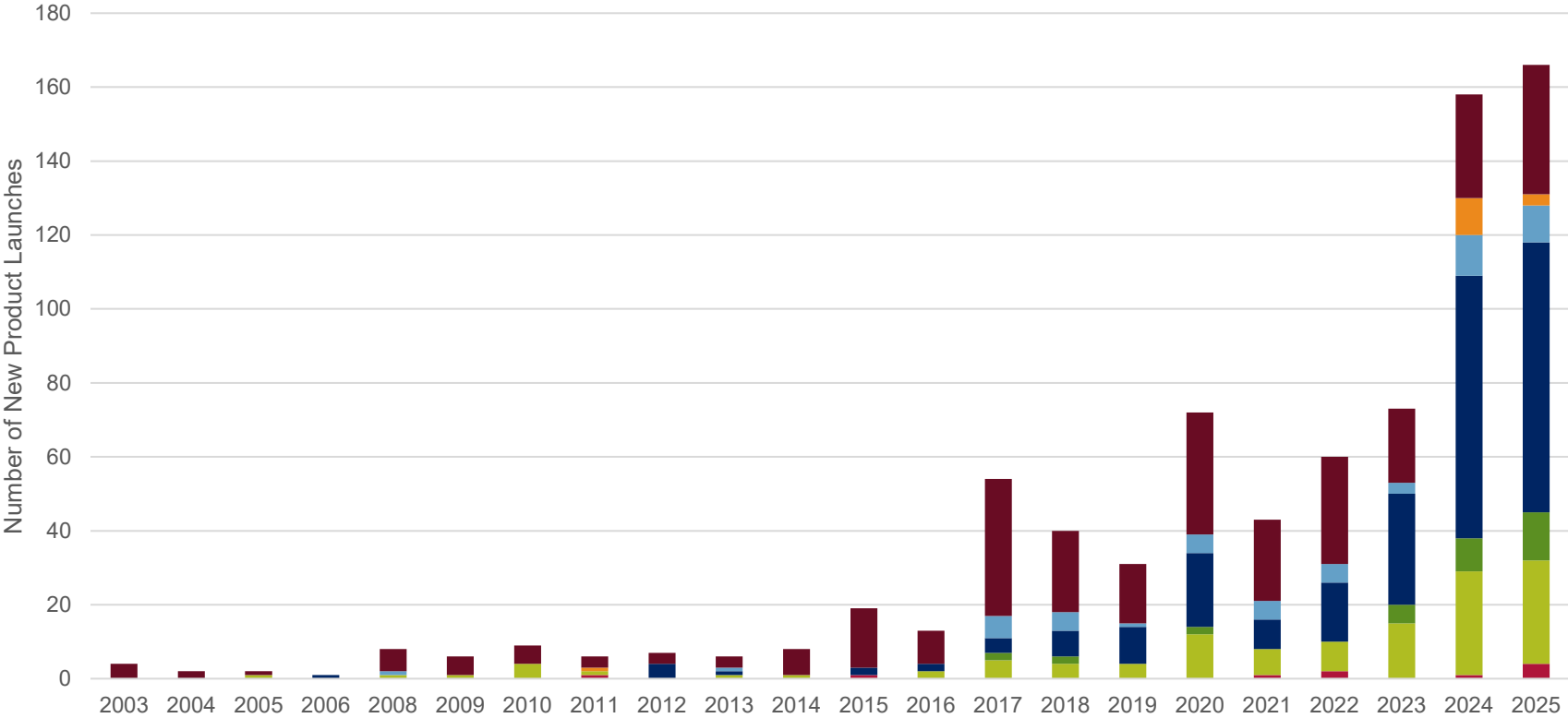
**VALIDATOR**

**TRAVEL**

**FUTURE  
ADOPTERS**

# Food & beverage trends are born locally, break out of niche, and scale across global markets.

Hot and Iced Coffee with Protein New Product Launches Globally  
2003-2025



USA, 2008

**Bolthouse Farms Perfectly Protein Mocha Cappuccino**

Source: Innova New Product Database

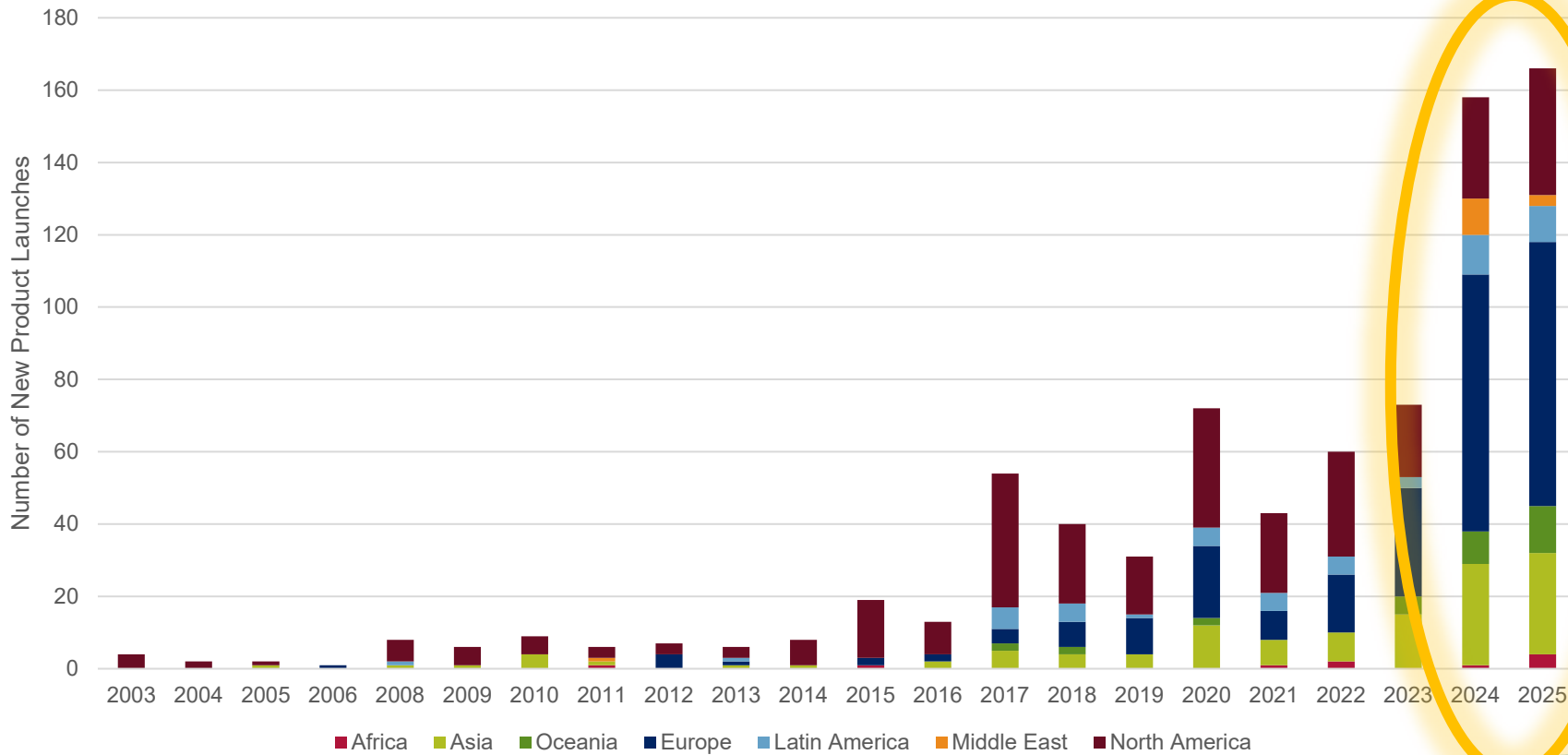




**Which region has been the number-one global leader in new high-protein coffee product launches over the last two years?**

# Food & beverage trends are born locally, break out of niche, and scale across global markets.

Hot and Iced Protein Coffee New Product Launches Globally  
2003-2025



USA, 2008

**Bolthouse Farms Perfectly Protein Mocha Cappuccino**

# Protein coffees first appeared in U.S. retail in the early 2000s but didn't gain momentum until 2024, when launches more than doubled and interest grew, especially in Europe.



 Japan, 2024

Oikos Café Latte



 USA, 2025

Super Coffee Xtra Coffee  
+ Energy Caramel Flavored



 Germany, 2025

Weider Milk Protein  
Iced Coffee Latte



 Australia, 2025

Starbucks Caramel  
Hazelnut Flavor Protein  
Drink with Coffee



 Brazil, 2025

Santa Clara Cappuccino  
with Protein



 Saudi Arabia, 2025

Almerai Protein Milk  
Fat Free Coffee

# Protein coffees first appeared in U.S. retail in the early 2000s but didn't gain momentum until 2024, when launches more than doubled and interest grew, especially in Europe.




 *Japan, 2024*  
**Oikos Café Latte**



 *USA, 2025*  
**Super Coffee Xtra Coffee + Energy Caramel Flavored**



 *Germany, 2025*  
**Weider Milk Protein Iced Coffee Latte**



 *Australia, 2025*  
**Starbucks Caramel Hazelnut Flavor Protein Drink with Coffee**



 *Brazil, 2025*  
**Santa Clara Cappuccino with Protein**



 *Saudi Arabia, 2025*  
**Almerai Protein Milk Fat Free Coffee**

In parallel to the acceleration at retail, protein coffee also spread to foodservice in early 2024 in the U.S. and Brazil.



📍 USA, Q1 2024

Dutch Bros Protein Latte

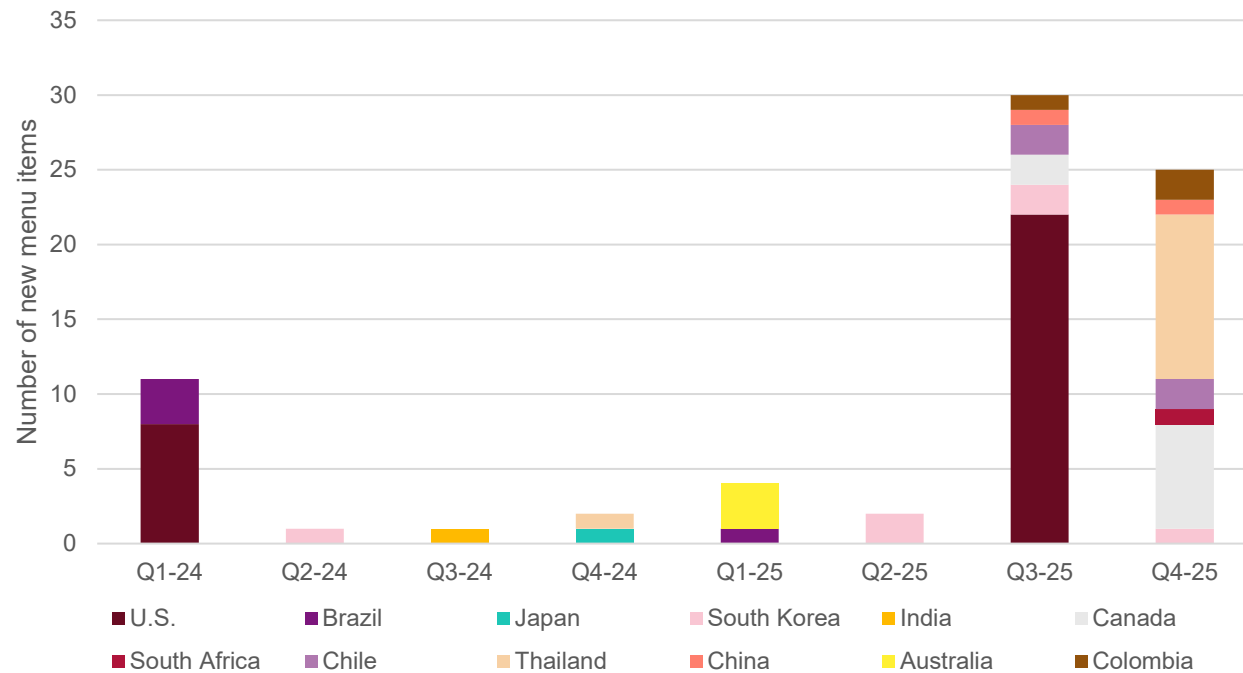


📍 Brazil, Q1 2024

Mais.Cafe Iced "Wheypuccino"

# By 2025, protein coffees had expanded to menus in foodservice in Canada, South Korea, Thailand, Chile, and Colombia.

Protein Coffee at Foodservice by Country  
Q1 2024 – Q4 2025



D'Oro Malt Protein Latte

Thailand, Q4 2025

# The next wave of growth to watch includes European foodservice expansion ...

RETAIL

FOODSERVICE

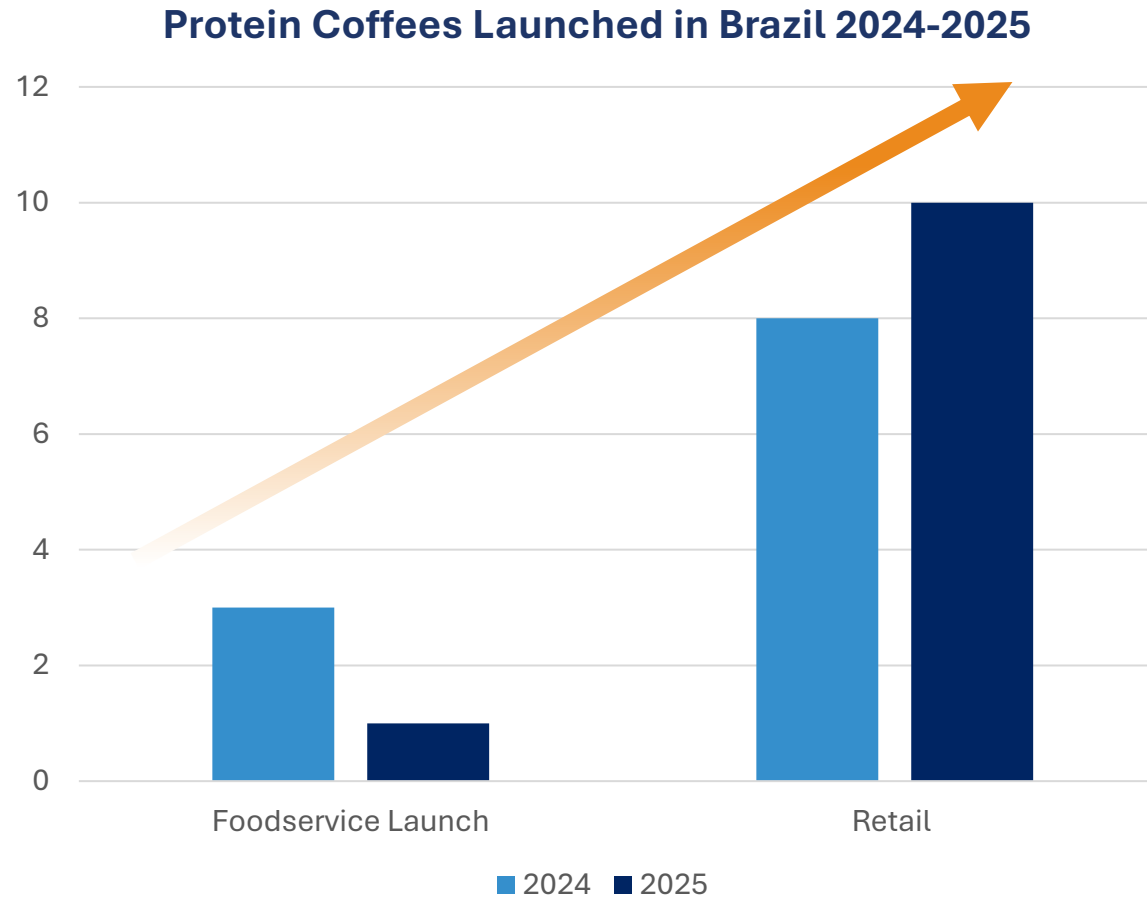


Belgium,  
January 2026

Starbucks Protein Drink



# ...and broader adoption in Brazil.

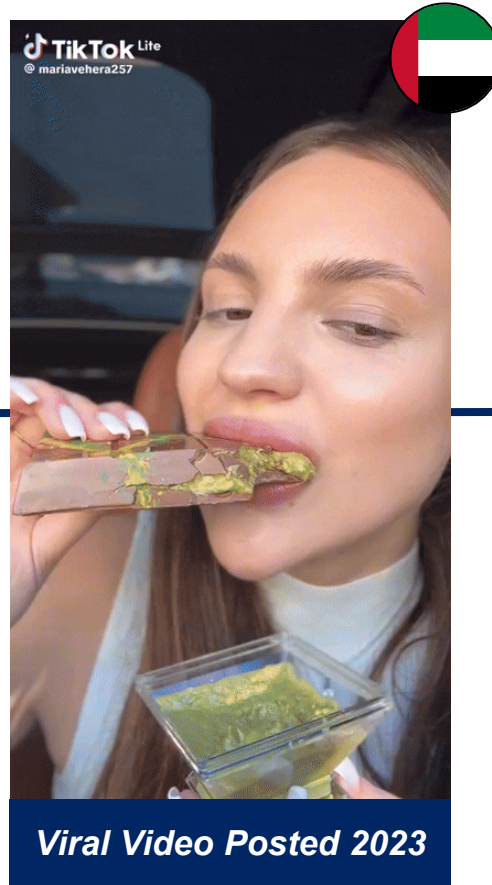


# Dubai chocolates were first launched in 2022 and surged in popularity after a viral TikTok video in 2023.



*Initial Launch in 2022*

Fix Dessert Chocolatier launched  
*Can't Get Knafeh of It*



*Viral Video Posted 2023*

Posted on TikTok by @mariaverhara,  
Earning 7.7M views and 71k likes

## How A Pregnancy Craving Led To One Of The Most Viral Chocolate Bars Of Our Time

By [Julia Holland](#) · May 23, 2025 9:15 am EST

### The TikTok-Famous Dubai Chocolate Traces Its Origins to the 13th-Century Middle East

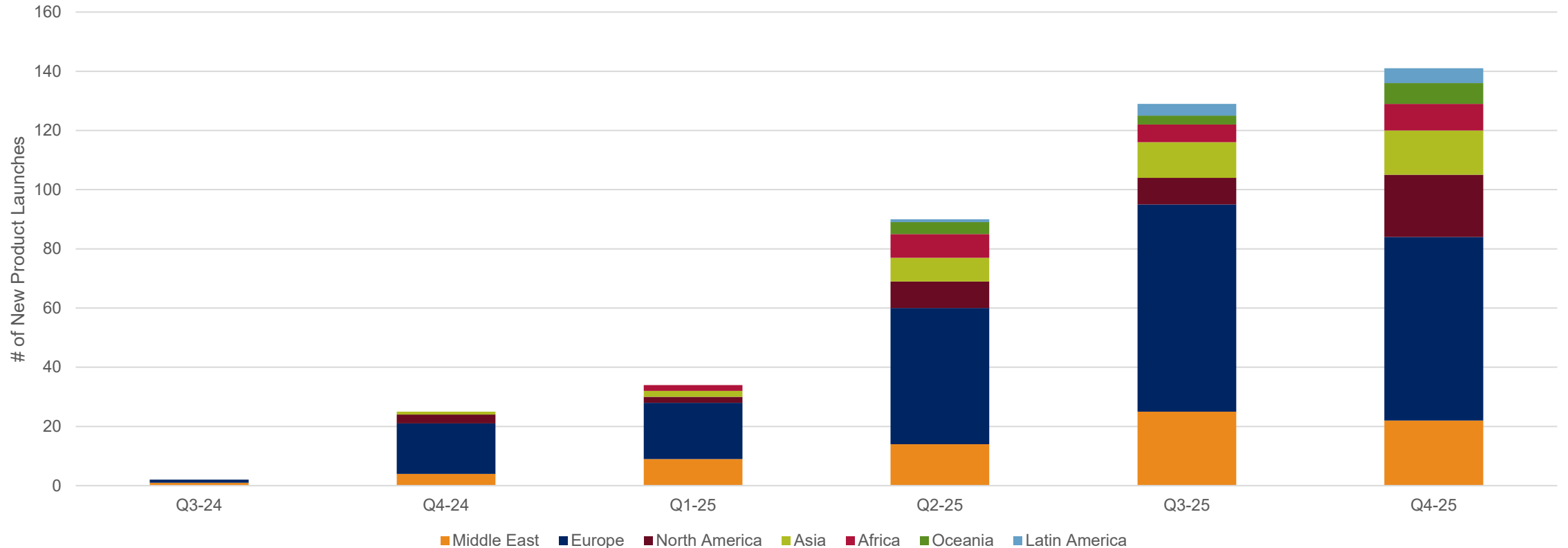
Generation Z is putting its own spin on knafeh, a dish first designed to quash a caliph's hunger pangs



*Media Coverage Continues to Spread*

# Dubai chocolate quickly expanded beyond the Middle East into Europe, Asia, the U.S., Africa, and LATAM.

Dubai Chocolate New Product Launches Global  
2024-2025



# Dubai chocolate has taken shape in new formats as it grows as a flavor.

Retail



 Brazil, 2025

**L'or Dubai Chocolate  
Premium Cappuccino Sticks**



 Australia, 2025

**Wallaby Dubai Style  
Choc Bites Pistachio**



 USA, 2025

**Evogen Isoject Protein  
Powder Dubai Style  
Chocolate Bar Flavor**



 UAE, 2025

**Nestle Kitkat  
Miniatures Pistachio  
Kunafa Chocolate Bar**



 F

**La C  
Mochi  
Choco**

# Dubai chocolate has taken shape in new formats as it grows as a flavor.

Retail



Australia, 2025

Dubai Style  
Pistachio



USA, 2025

Evogen Isoject Protein  
Powder Dubai Style  
Chocolate Bar Flavor



UAE, 2025

Nestle Kitkat  
Miniatures Pistachio  
Kunafa Chocolate Bar



France, 2025

La Compagnie Du  
Mochi Dubai Style  
Chocolate Ice Cream

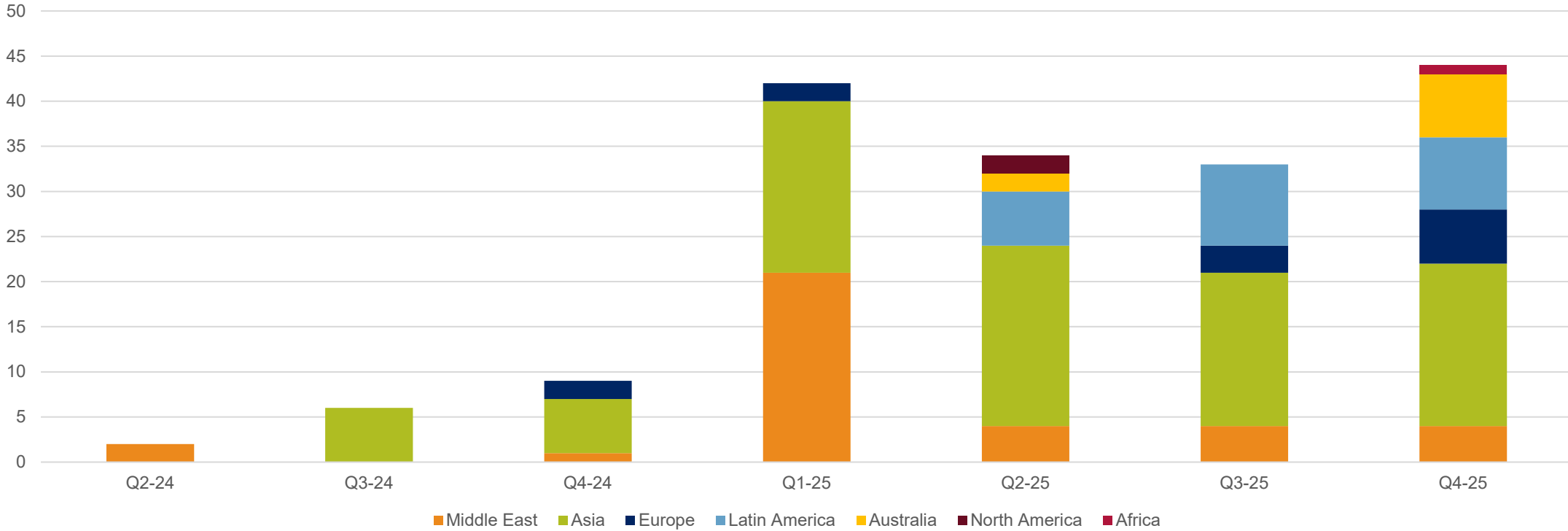


France, 2025

Dubai Style  
Pistachio Choco Bar

# Dubai chocolate replicated its retail expansion across foodservice in Asia, Europe, the U.S., and LATAM.

Dubai Chocolate at Foodservice by Region  
Q2 2024 – Q4 2025



Source: Technomic Global Foodservice Navigator Global Monthly Menu Item Tracker



# Dubai chocolate is appearing across foodservice offerings, from donuts to ice cream.

Foodservice



📍 UAE, 2024

**Pistachio Kunafa  
Doughnut**



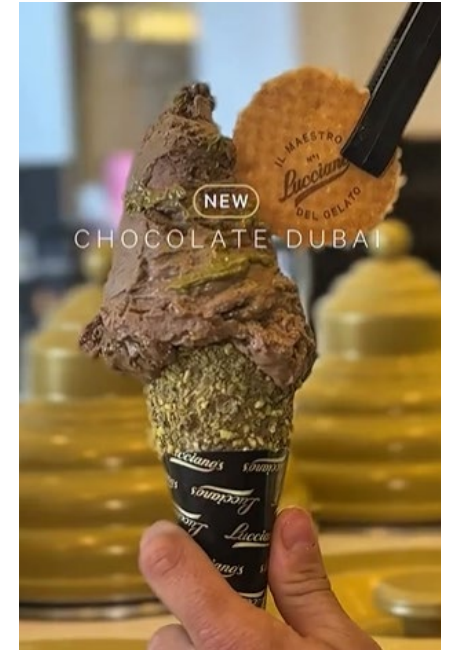
📍 South Korea, 2024

**Dubai Style  
Chocolate Cake**



📍 Thailand, 2025

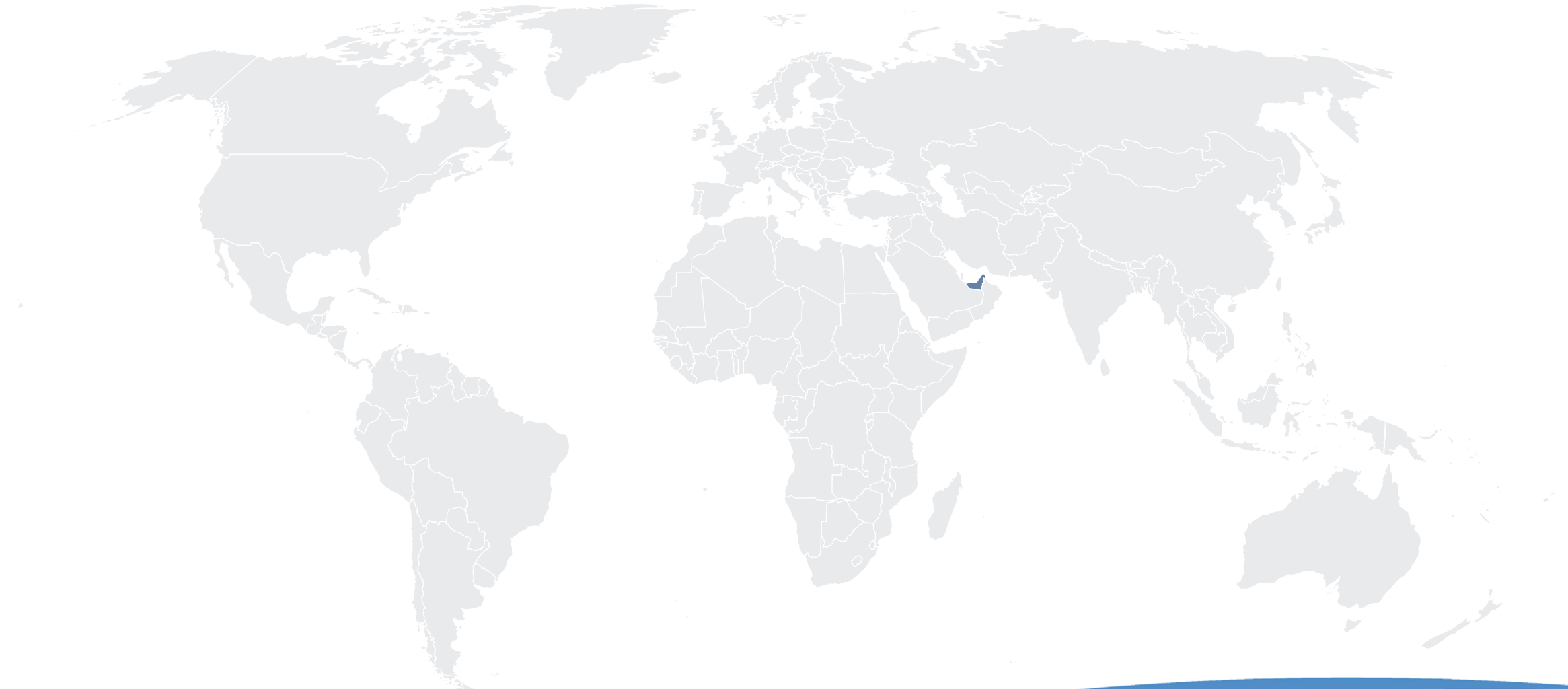
**Dubai Style Pistachio  
Choco Bar**



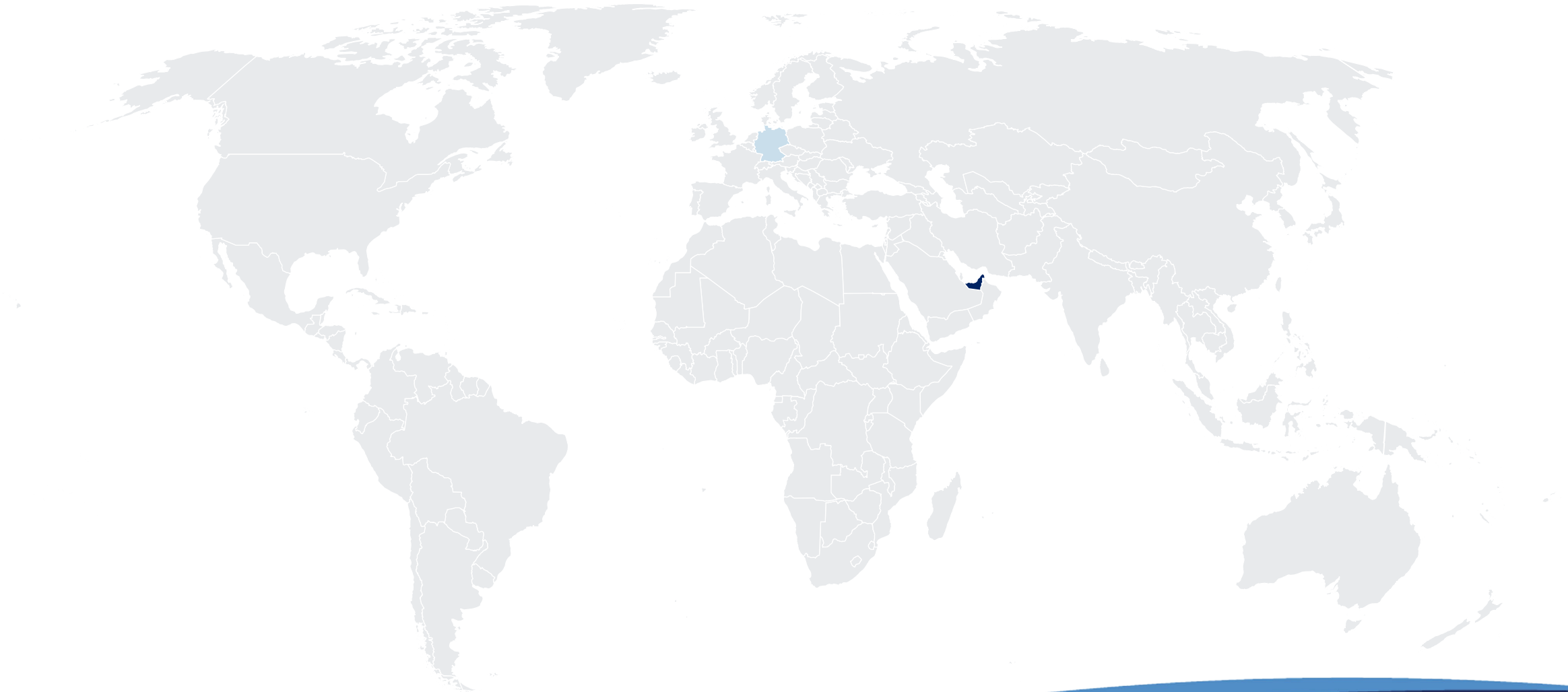
📍 Argentina, 2025

**Dubai Chocolate  
Ice Cream**

# Q2-24

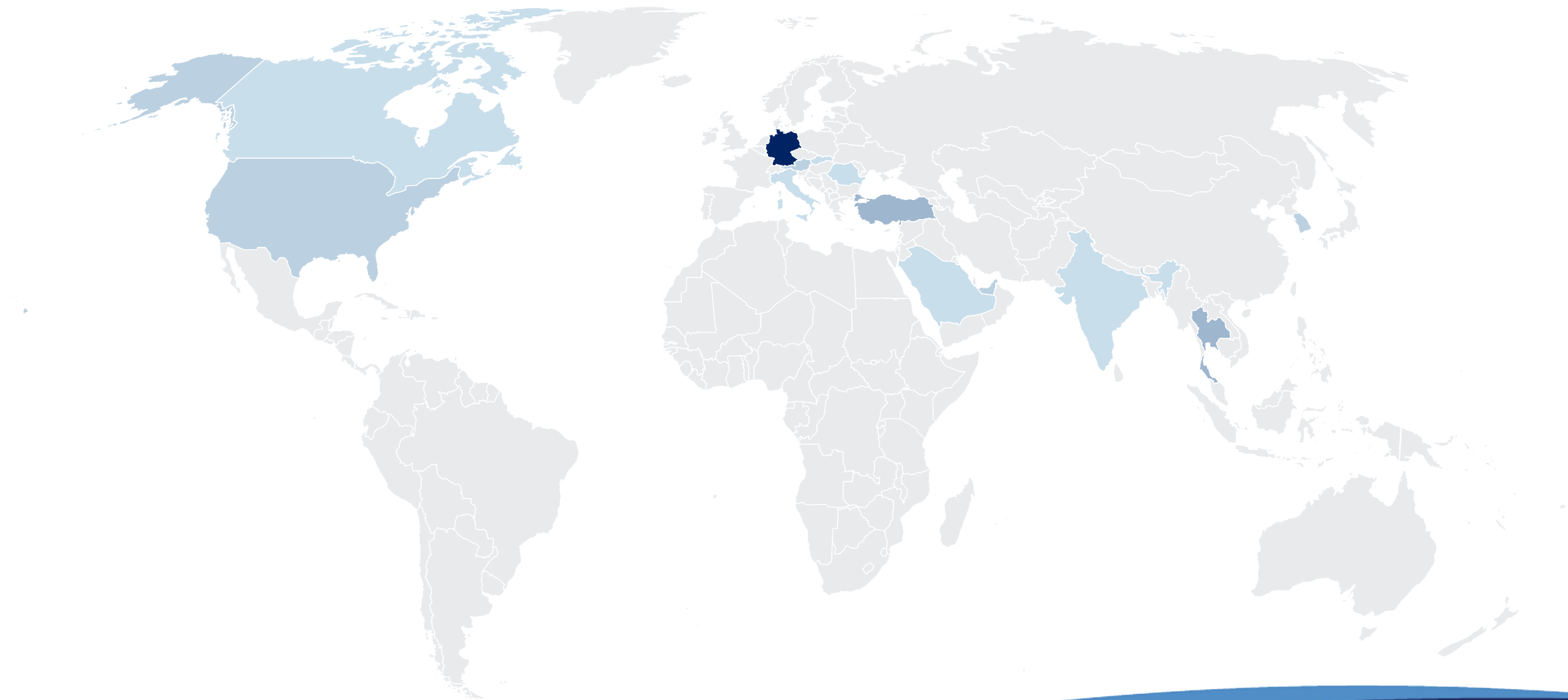


# Q3-24

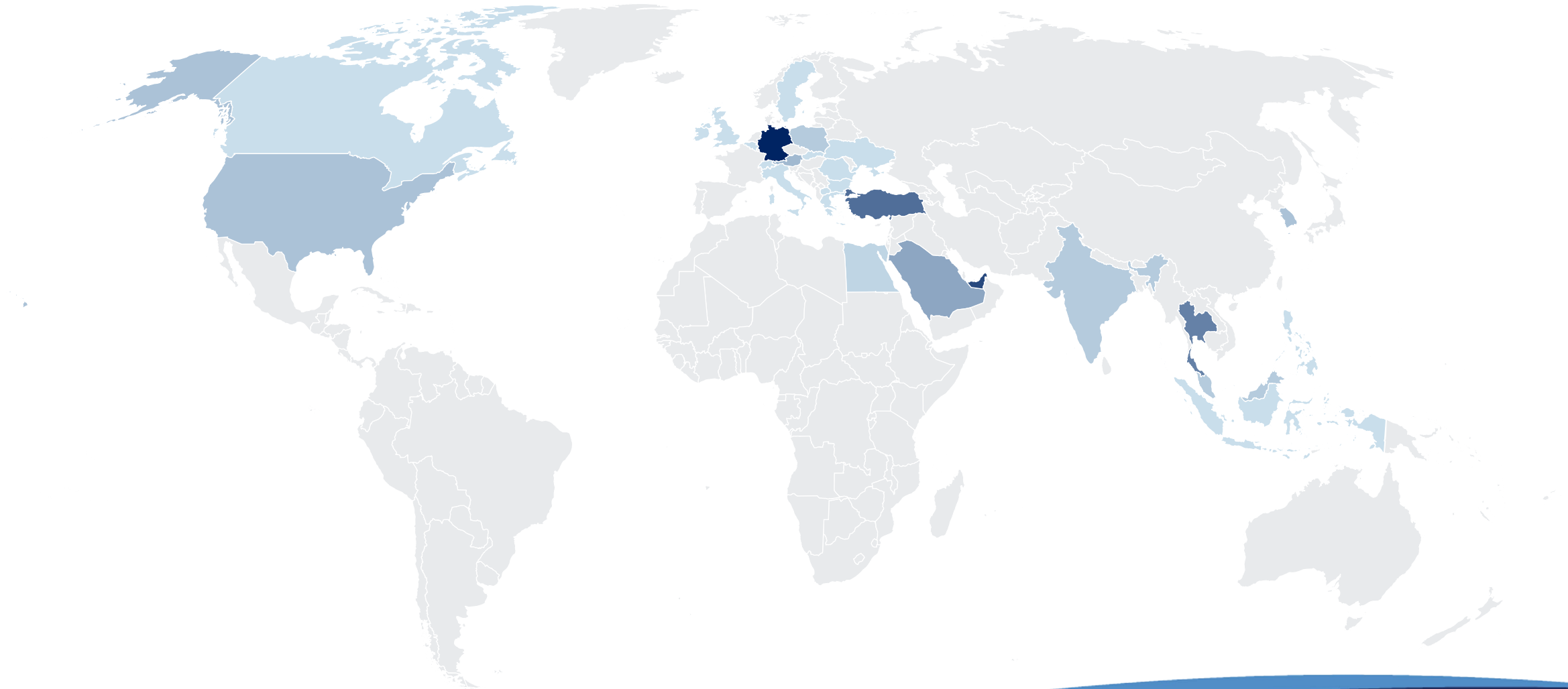


# Q4-24

1  15

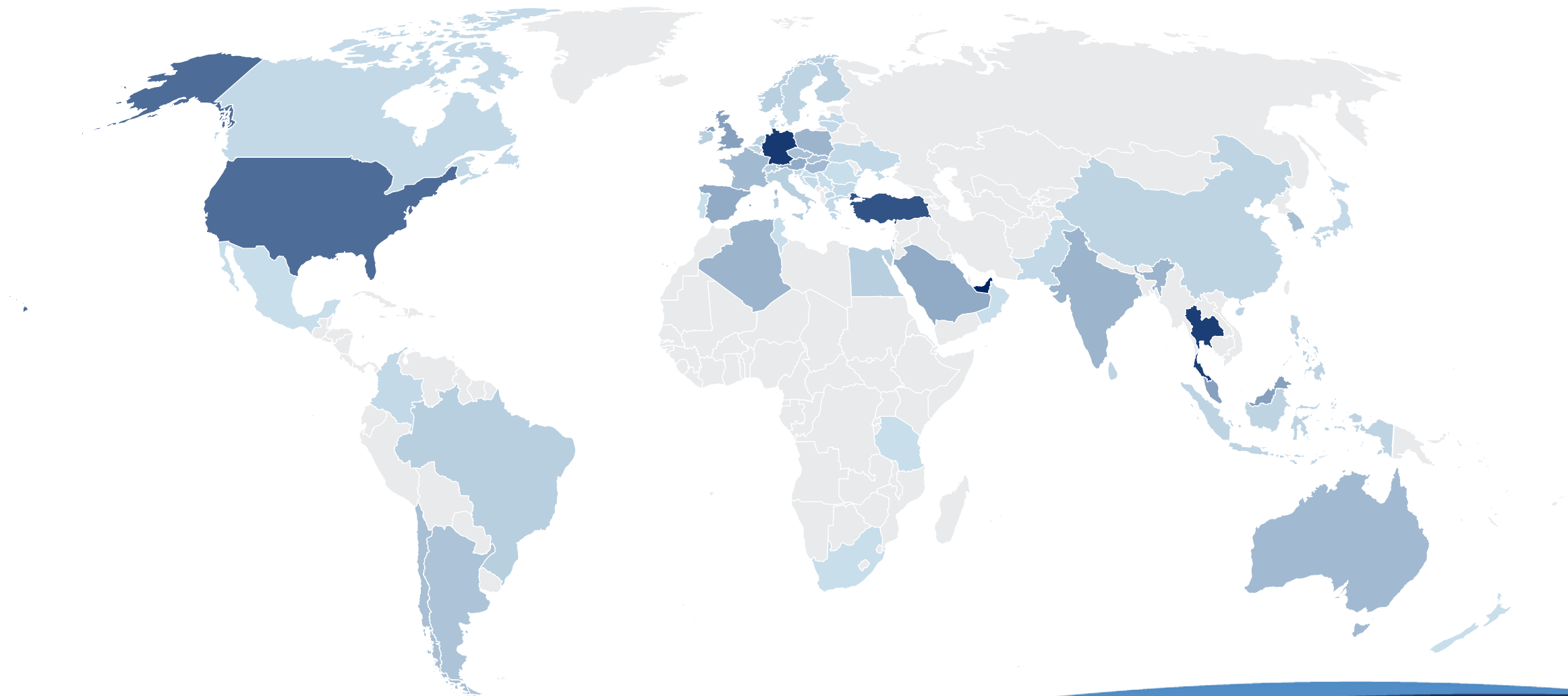


# Q1-25

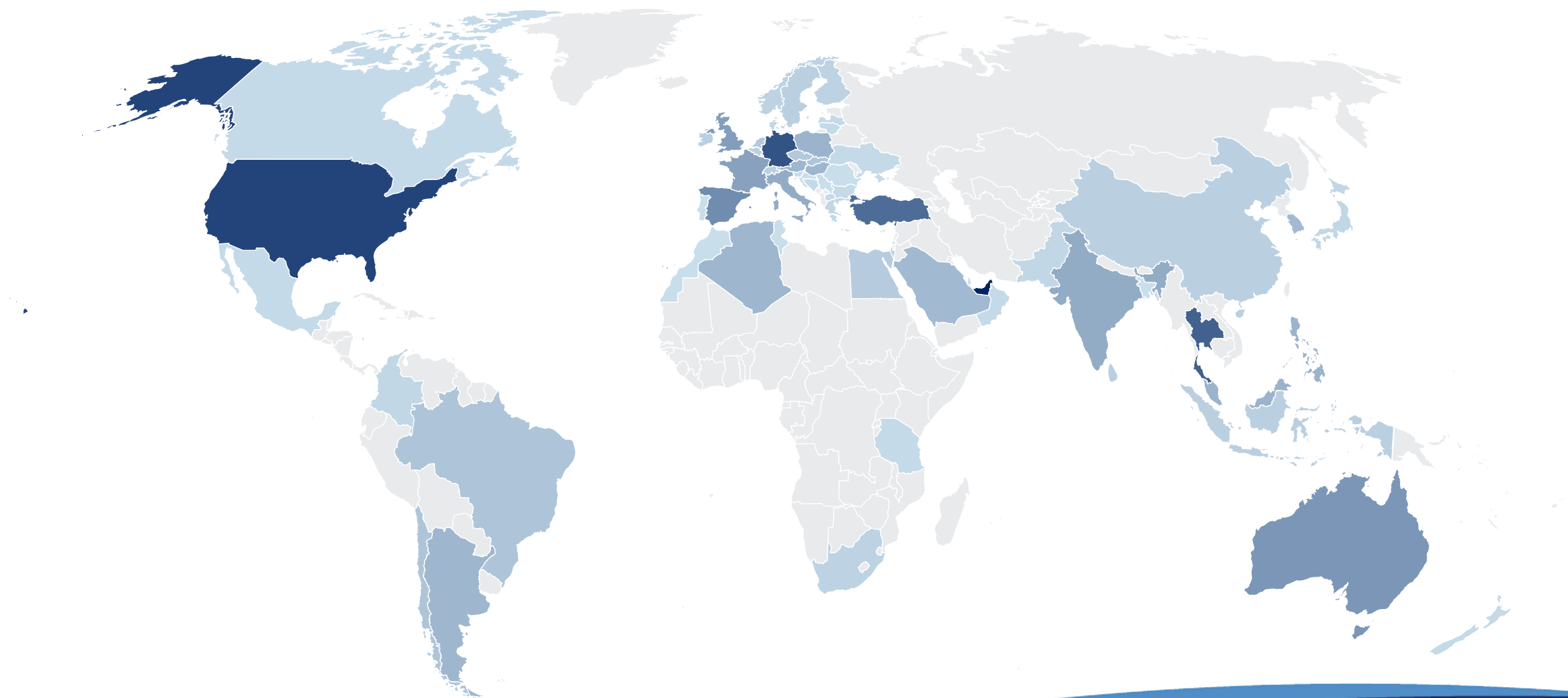




# Q3-25



# Q4-25



# And brands have started innovating beyond flavor, elevating from a taste into an experience.



@hudsonsqrd

**Posted Jan 2026  
Foodservice**

*Food content creator visited Korea to try the viral Dubai Chewy Cookie dessert.*

**1.4M**  
views

**70k**  
likes



frenchluxury\_ceo DUDUKU!!!!!!!!!!!!!! 🔥🔥🔥🔥🔥 I'm craving some more 🤤🤤🤤



@hannahwithfuud

**Posted Sept 2025  
Foodservice**

*Australian creator sharing the Lindt Dubai chocolate ice cream in Italy*

**1.2M**  
views

**90k**  
likes



fridayy   
SO good

# The next chapter is less about new geographies and more about the trend's durability.



A collage of images related to bubble tea. On the left, a woman is surrounded by large, colorful, kawaii-style plush bubble tea cups in various flavors like green tea, orange, and pink. In the center, a pink package of "Perfecta" lip gloss is shown, labeled "BŁYSZCZYK DO UST BUBBLE TEA WILD CHERRY + CAMELLIA TEA" and "MEGA REGENERACJA I BLASK". On the right, a woman holds up a boba tea cup, with a text overlay that reads "PSA: National Boba Day is April 30 🥰".

**QUIZ**

Personality Quiz • Food Quiz • Updated on Jun 14, 2023

## If You Were A Bubble Tea Flavor, Which One Would You Be?

I'm matcha bubble tea 🍵



# The Next Wave of Global Dairy Consumption

# Halloumi cheese is a featured item on more foodservice menus.



 Saudi Arabia

Halloumi and American-style cheese on sandwich



 Australia

Hot Honey Halloumi Toastie

Source: Technomic Global Foodservice Navigator Global Monthly Menu Item Tracker

# Halloumi is becoming a center of plate item in the UK.



 **UK Barburrito**  
Hot Honey &  
Paprika Halloumi



 **UK McDonalds**  
Halloumi Fries

**17% of consumers  
in the UK would order  
a Halloumi Patty**

*Which is more popular than:*  
16% veggie patty  
15% fish/shellfish  
10% plant-based patty  
designed to mimic meat

# New retail launches include foodservice-inspired dishes such as Halloumi cheese grillers and fries.



 **United Kingdom**  
January 2025

 **Germany**  
May 2025



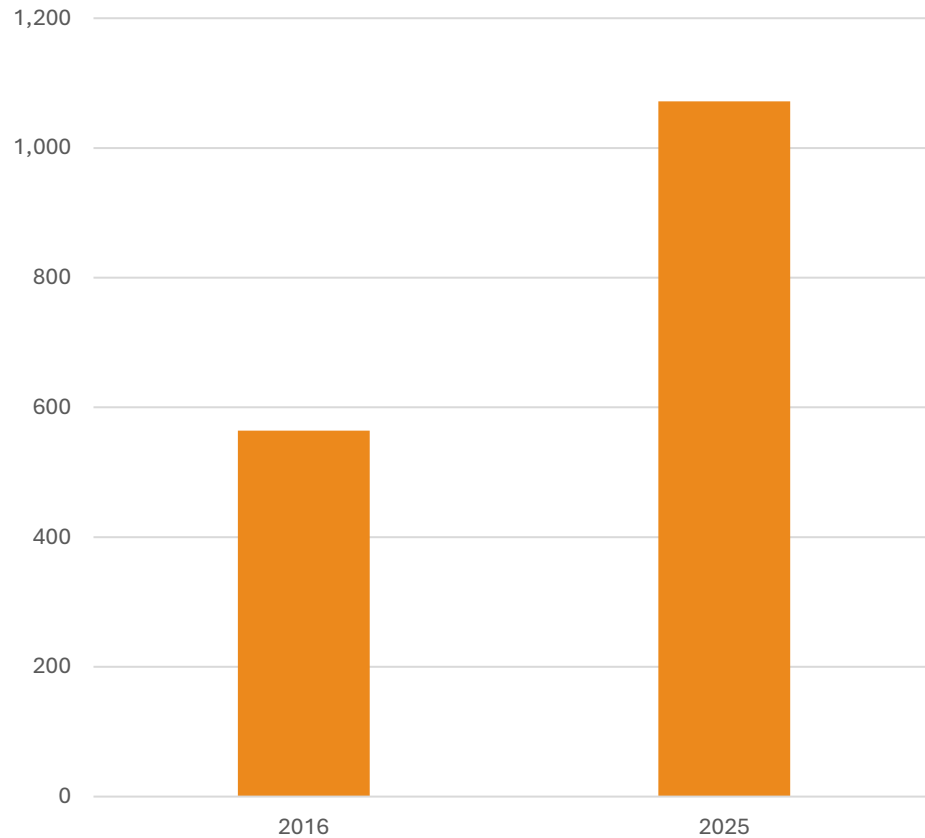
Per fry (oven cooked)

ENERGY	FAT	SATURATED	SUGARS	SALT
250kJ 60kcal	3.8g	1.6g	+0.5g	0.44g
2%	5%	2%	+1%	7%

% of the Reference Intakes  
Typical values per 100g Energy 1480kJ/355kcal

# Processors are adding more protein to cheese.

New Global "High Protein" Cheese Product Launches 2016 vs 2025



Prealpi Dinki Pro  
Formaggio: Pro Cheese



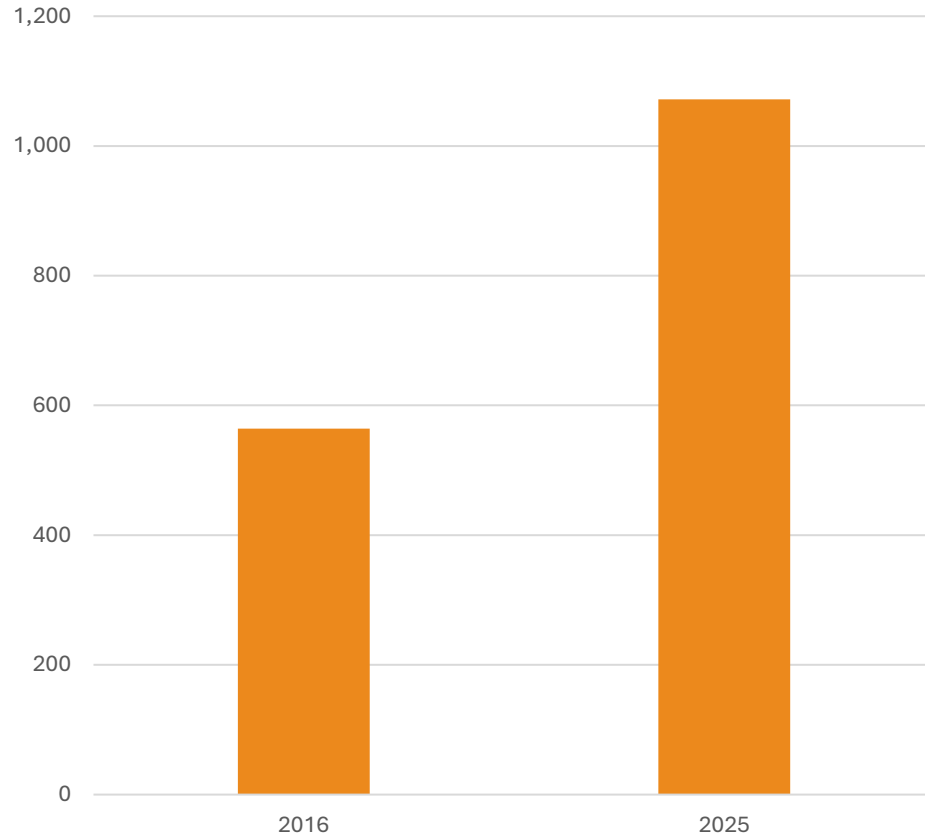
Italy  
December 2025

## Ingredients:

Cheese, water, concentrated whey, milk proteins, emulsifying salts, acidity regulator

# Processors are adding more protein to cheese.

New Global "High Protein" Cheese Product  
Launches 2016 vs 2025



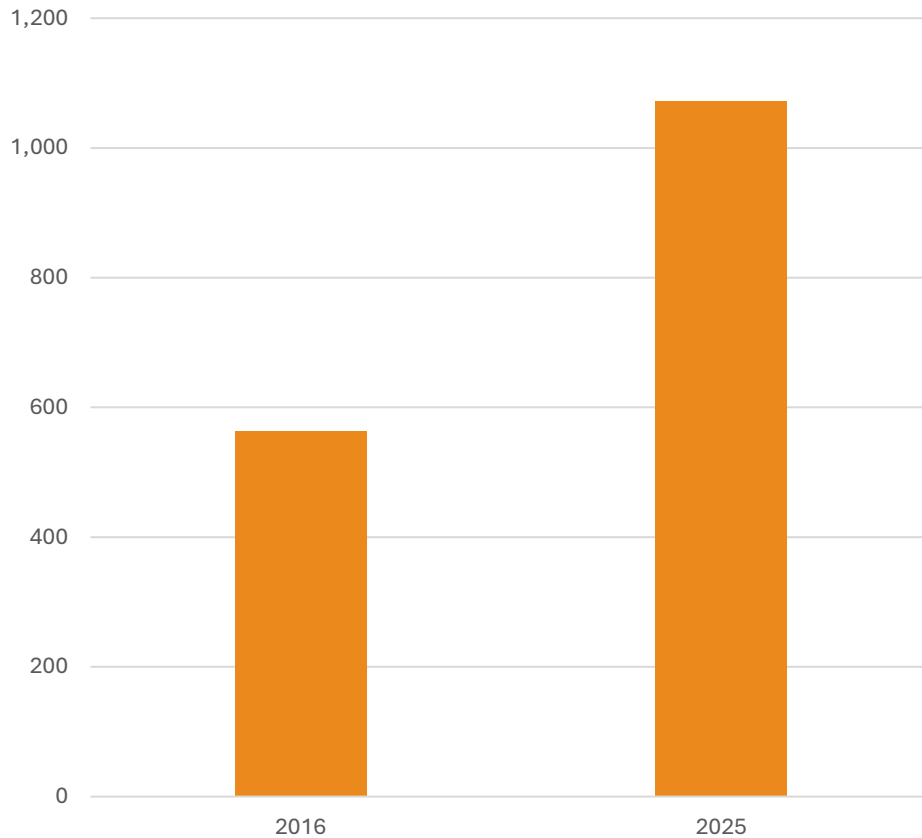
All Things  
Cottage Cheese

 *United Kingdom  
December 2025*

Ingredients:  
Skimmed milk, cream, mangoes,  
cultures, salt, sugar

# Processors are adding more protein to cheese.

New Global "High Protein" Cheese Product  
Launches 2016 vs 2025



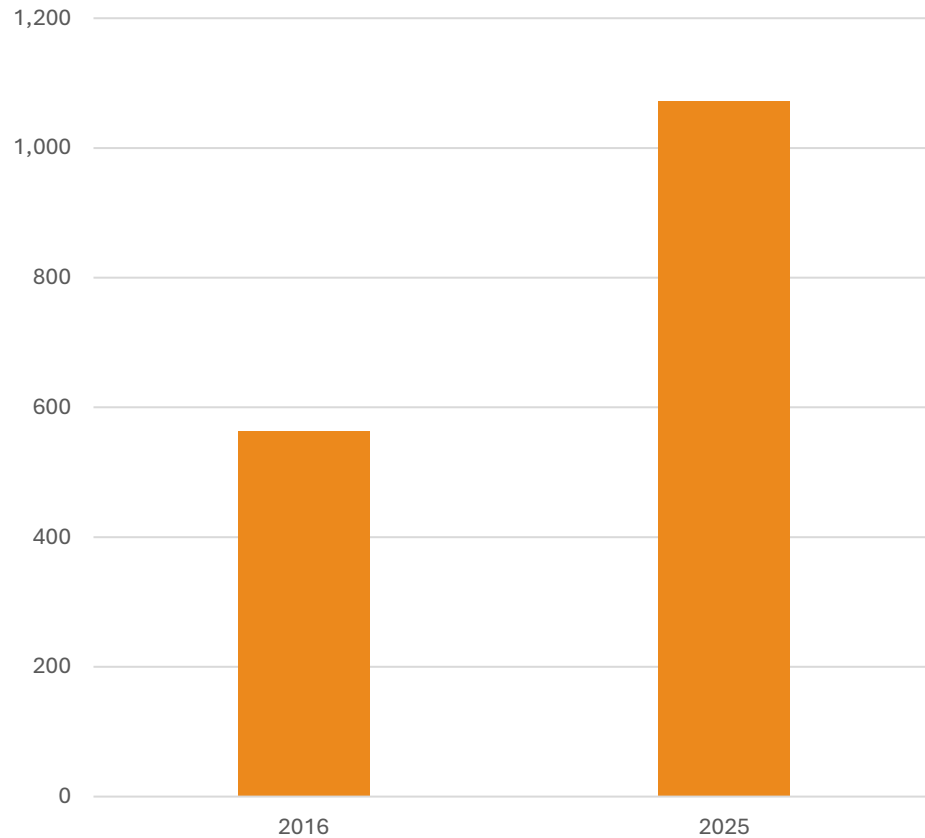
High Protein Ardagh  
Irish Grated Cheese

 Ireland  
January 2025

Ingredients:  
Milk, potato starch

# Processors are adding more protein to cheese.

New Global "High Protein" Cheese Product  
Launches 2016 vs 2025



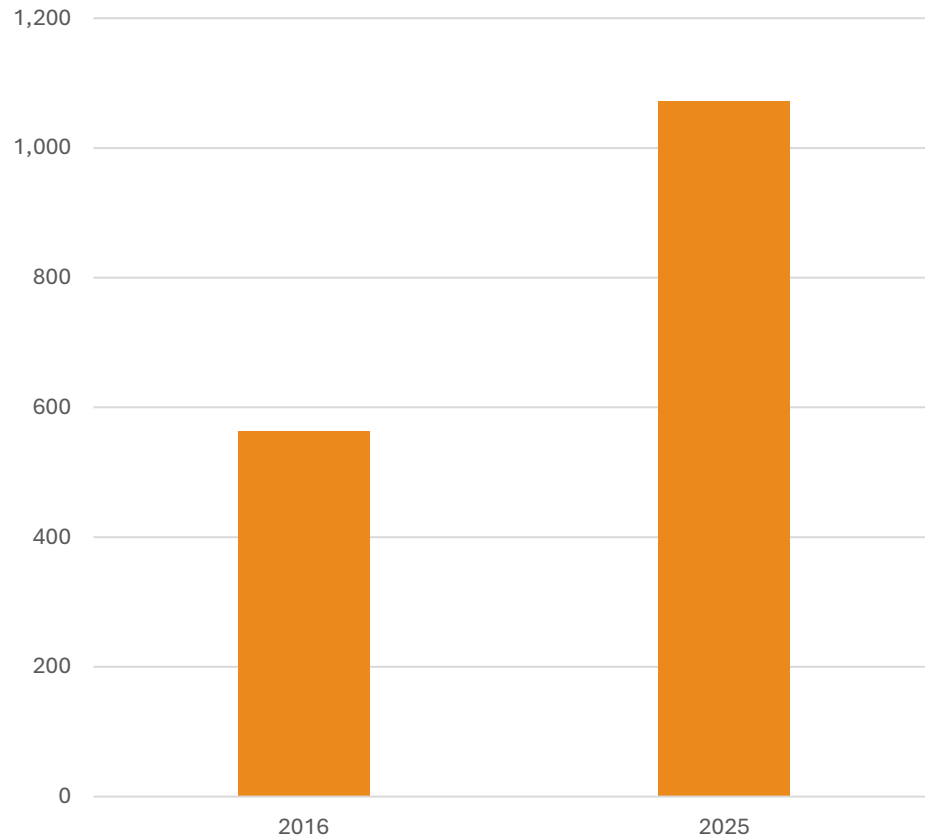
Pilos High Protein  
Cheese Slices

 Lithuania  
December 2025

Ingredients:  
Milk, whey protein, salt

# Processors are adding more protein to cheese.

New Global "High Protein" Cheese Product Launches 2016 vs 2025



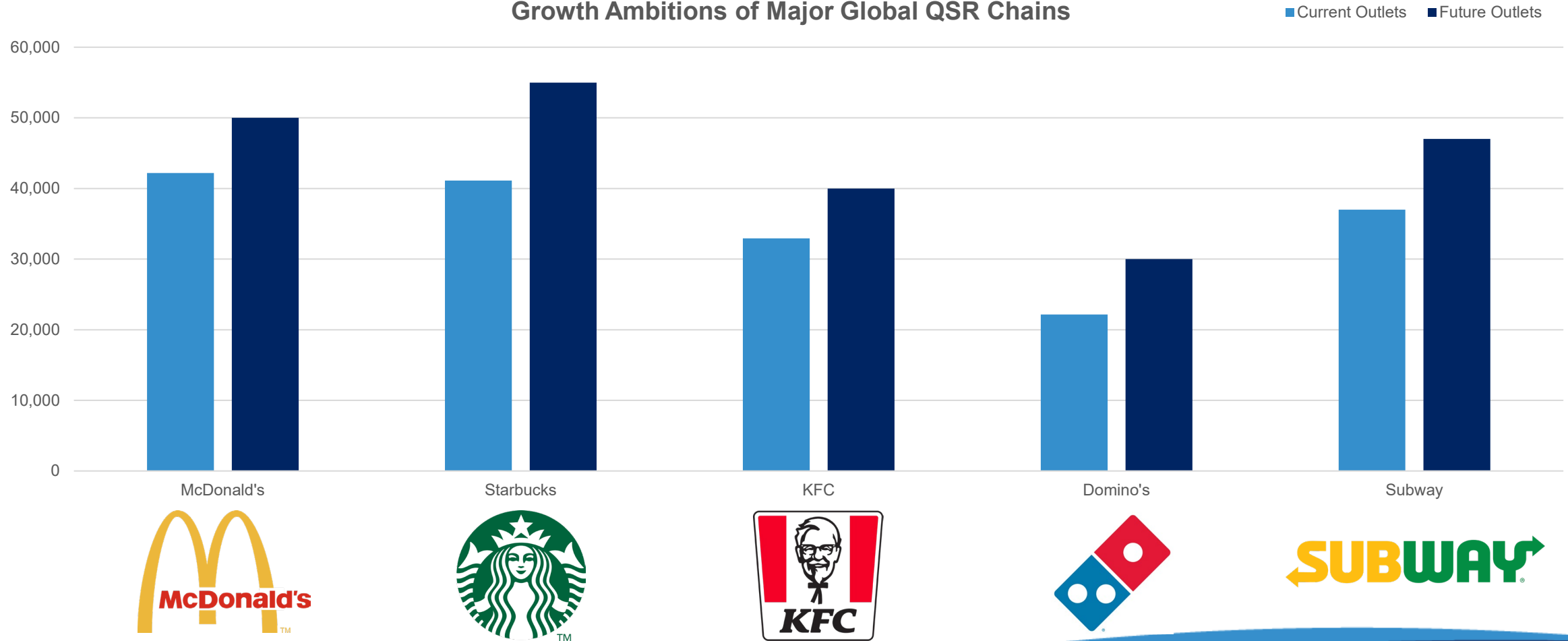
Riverina Dairy Co  
High Protein Fetta

 Australia  
June 2025

**Ingredients:**  
Cow's milk, milk solids, salt, cultures

# Global QSR expansion signals increasing cheese consumption.

Growth Ambitions of Major Global QSR Chains



Sources: Public company websites and media as of February 2026

# We analyzed several market indicators to understand where different cheese markets naturally fall along the S-curve.

UPPER CURVE



Argentina



New Zealand



United Kingdom

MID-CURVE



Japan



Mexico



South Korea

EARLY CURVE



Singapore



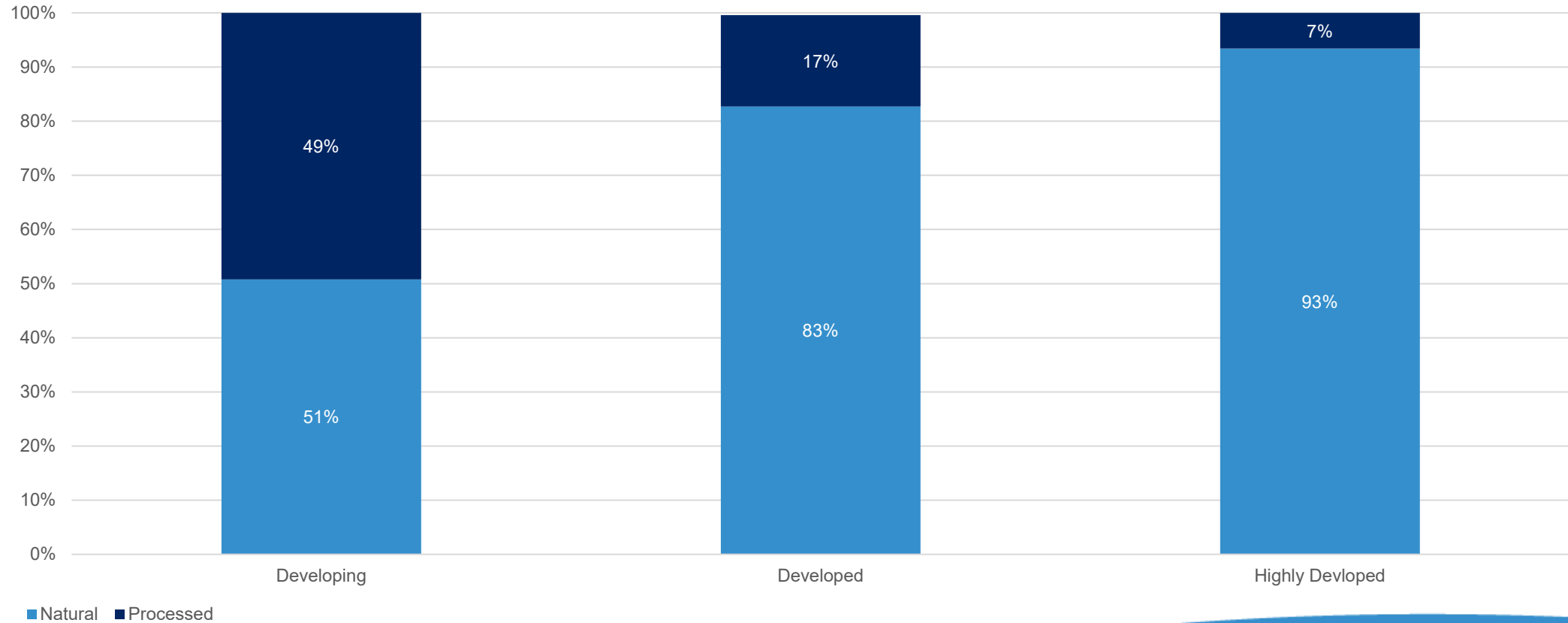
Philippines



Panama

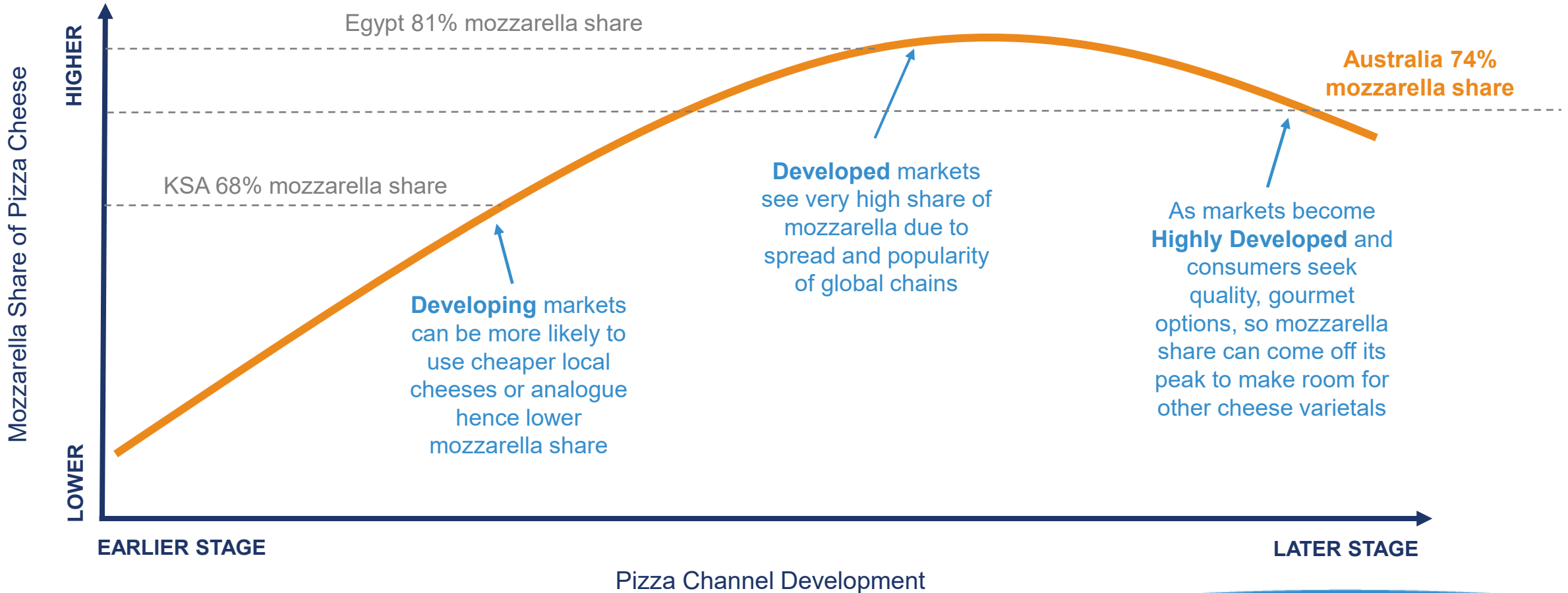
# As markets become more developed, the processed cheese share of total consumption decreases.

Processed vs. Natural cheese share of consumption (2025)



# Pizza markets follow a predictable maturity curve.

## Pizza cheese 'bell-curve'

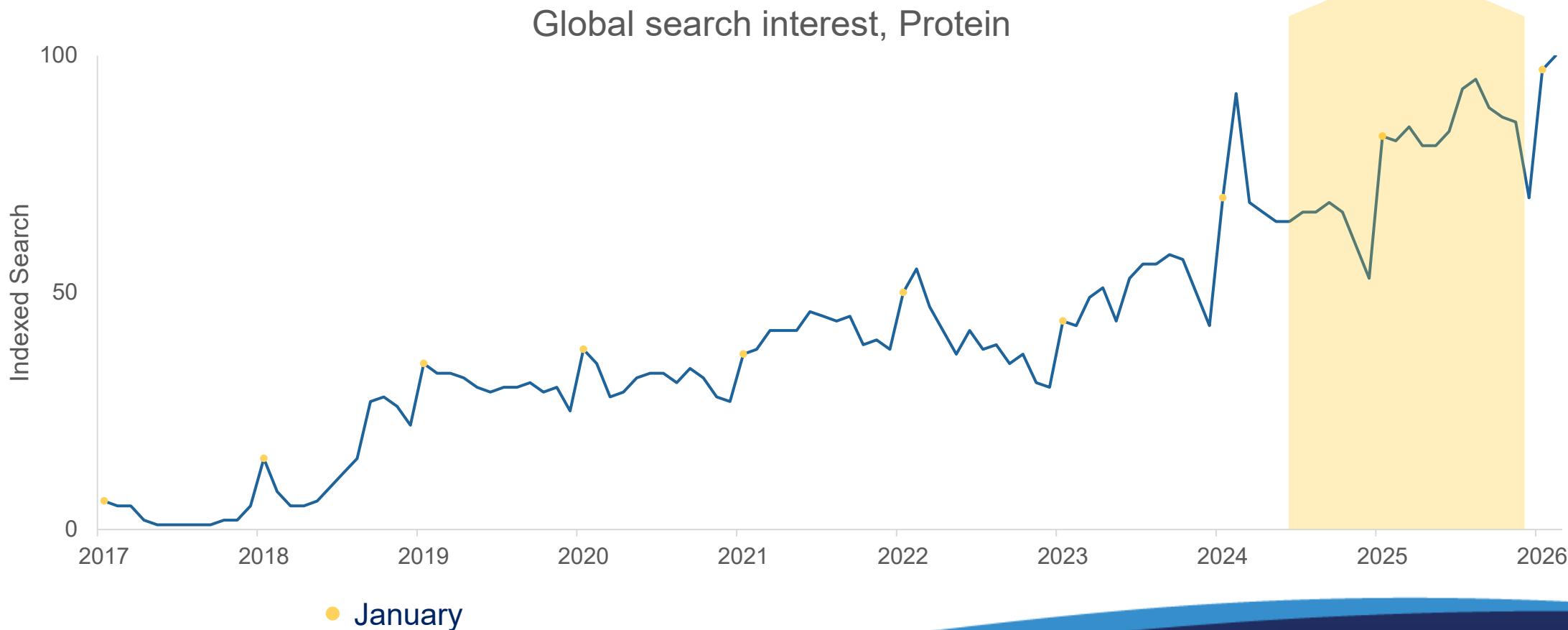




**Which global trend accelerated  
“protein” Google searches from  
2024–2026?**

# The protein trend is not new, but GLP-1 has reinforced the communication towards proteins.

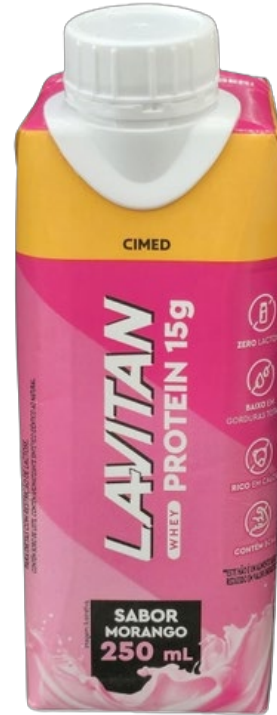
GLP-1 Rapid Global Adoption



# WPC80 is moving from infant formula toward adult and daily nutrition.

Global Application Share WPC80  
2025e-2030f

Application	2025e share	2030f share	Change (pp)
Nutritional & functional foods	50%	55%	+5
Mainstream food	27%	30%	+3
Infant formula	20%	13%	-7
Feed	3%	3%	0



 Brazil,  
September 2025

**Cimed Lavitan  
Whey Protein**



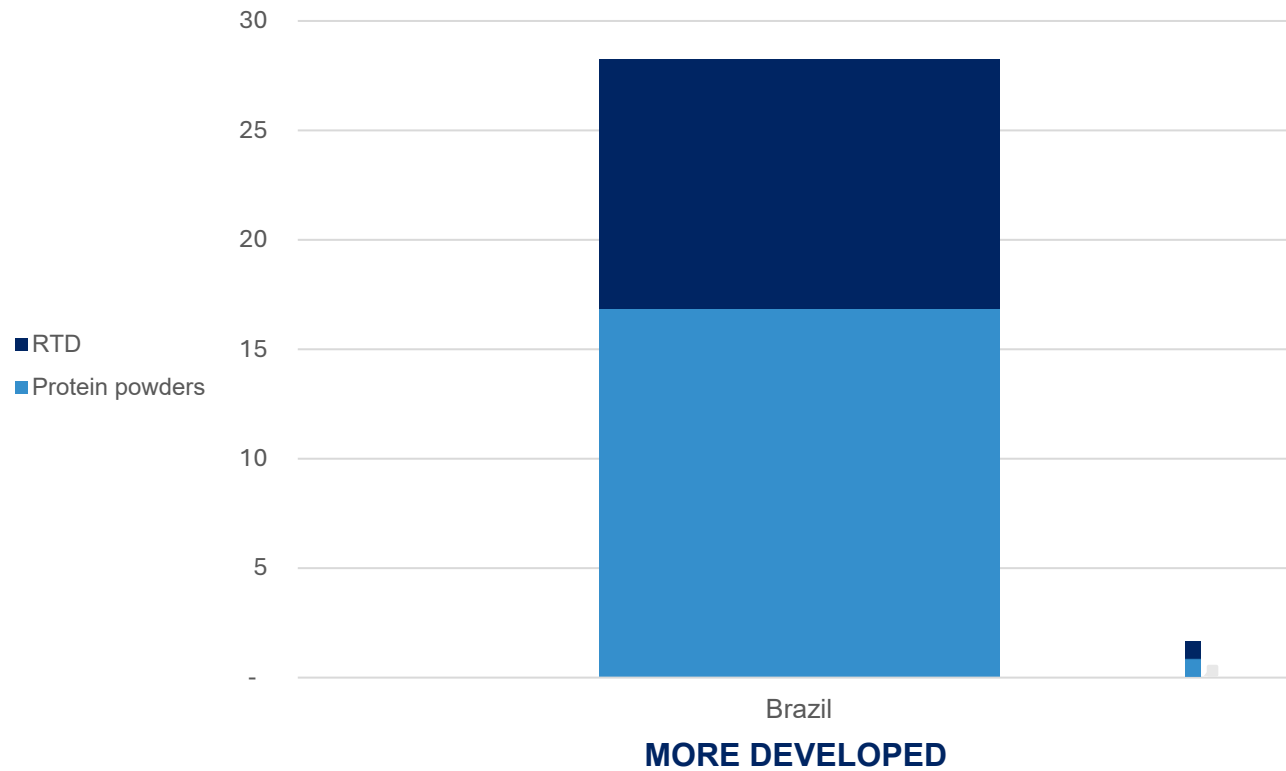
 USA,  
December 2025

**Kellogg's Eggo Protein  
Strawberry Blast**

# However, for WPI specifically, growth is being driven by protein powders and RTD beverages.

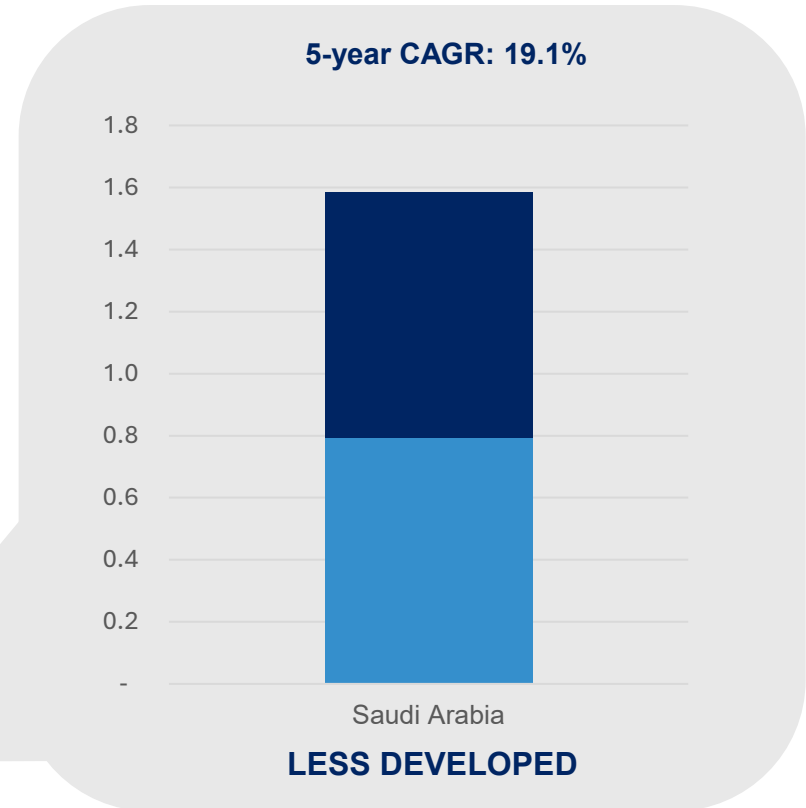
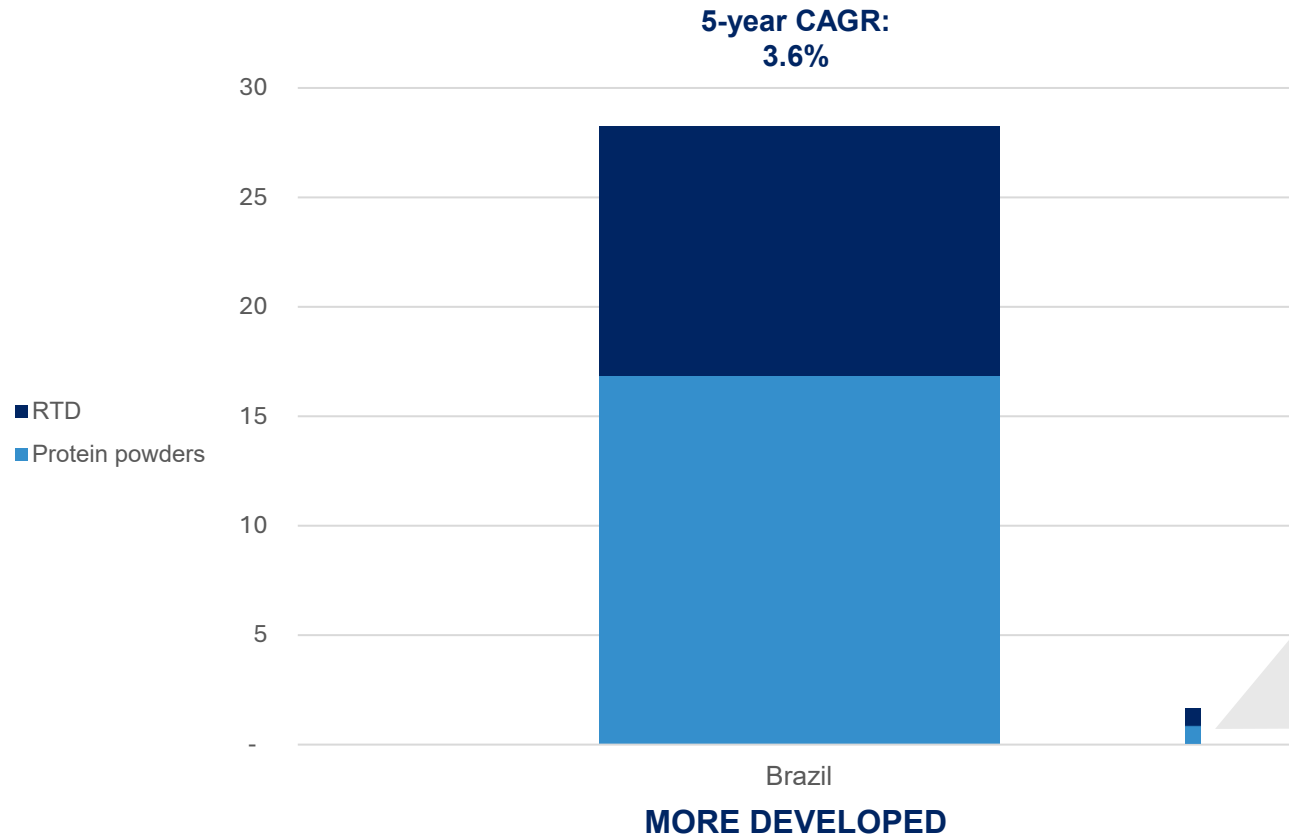
Consumption of WPI in Protein Powders and RTDs ('000 MT)  
2025e Per Capita

5-year CAGR:  
3.6%



# However, for WPI specifically, growth is being driven by protein powders and RTD beverages.

Consumption of WPI in Protein Powders and RTDs ('000 MT)  
2025e Per Capita



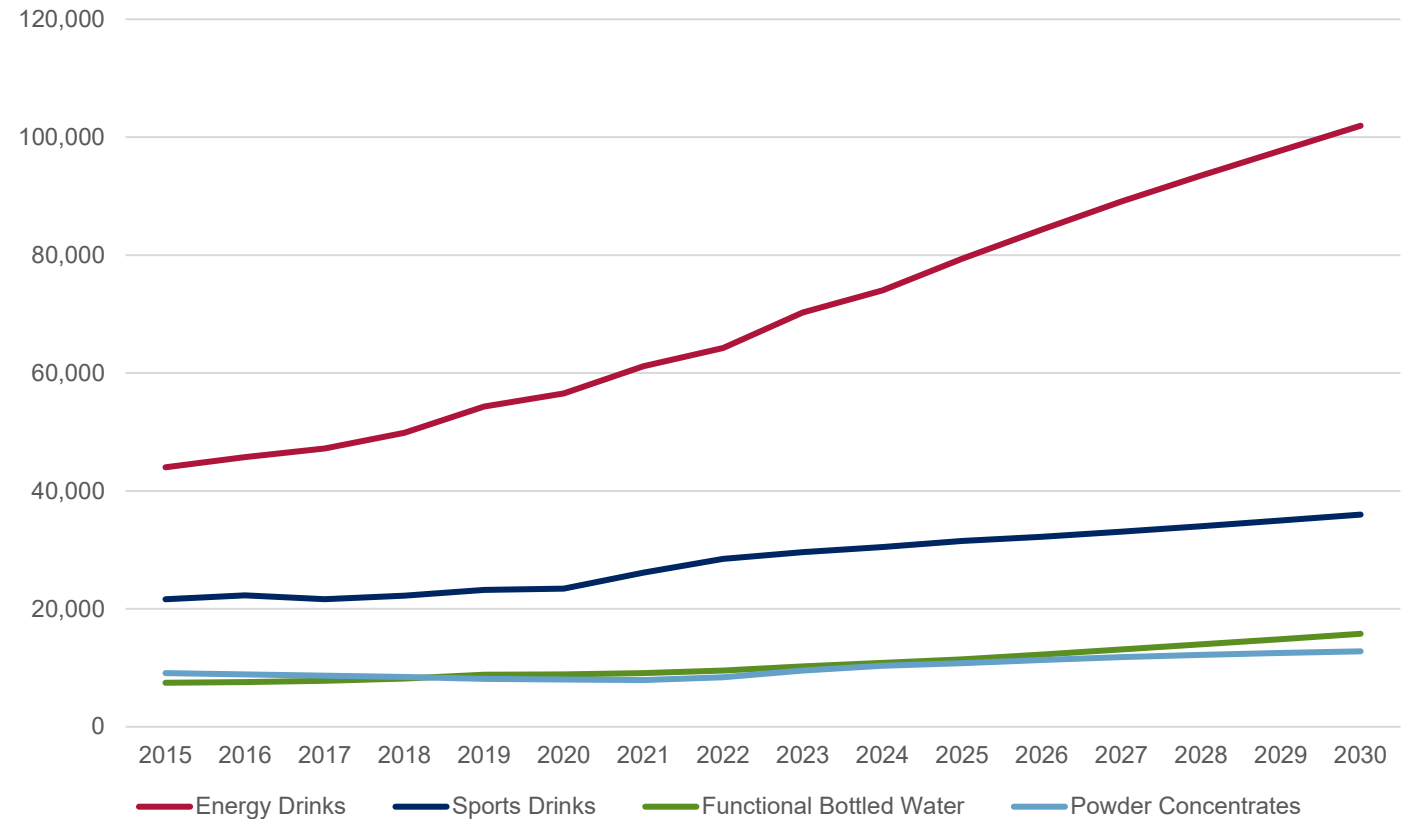
# Beverages are leading innovation in wellness.

# 51%

“I increased my consumption of beverages because they are healthy.”



### Functional Beverage Global Market Size 2015-2030f



Sources (1) Innova Category Survey 2025 (Average of 11 countries), Innova Database  
(2) Euromonitor Passport Off-trade Value RSP USD Million Fixed Rates 2025, geography "world"; Euromonitor Voice of the Industry 2025, PepsiCo.com

# WPI is emerging as an ingredient in protein waters and carbonates.



 Ireland, April 2024

**Avonmore Vitamins and More Berry Flavored Protein Water**



 USA, September 2025

**Genius Gourmet Blue Raspberry Sparkling Clear Protein USA**



 USA, January 2025

**Clear Protein Water**



 Japan, June 2025

**Savas Whey Protein Water**

Source: Innova New Product Launch Database

# Beverages are crossing over into the snacking category.

**Q** ■ Which snack categories do you associate with healthy snacks?

**75%**

**DAIRY-BASED DRINKS**

**72%**

**JUICE AND SMOOTHIES**



# Milk applications have expanded from lattes to full meal-driven beverages.



LATTE



EARL GREY TEA LATTE



'SOUPUCCINO'

# Consumers desire better absorbing protein.

# 31%

How well the body absorbs or uses protein is an important factor when choosing F&B to get protein



 USA, January 2025

A great combination of fast and slow absorbing protein.



 UK, April 2025

RTD whey protein shot delivers 20g of fast-absorbing protein in seconds.

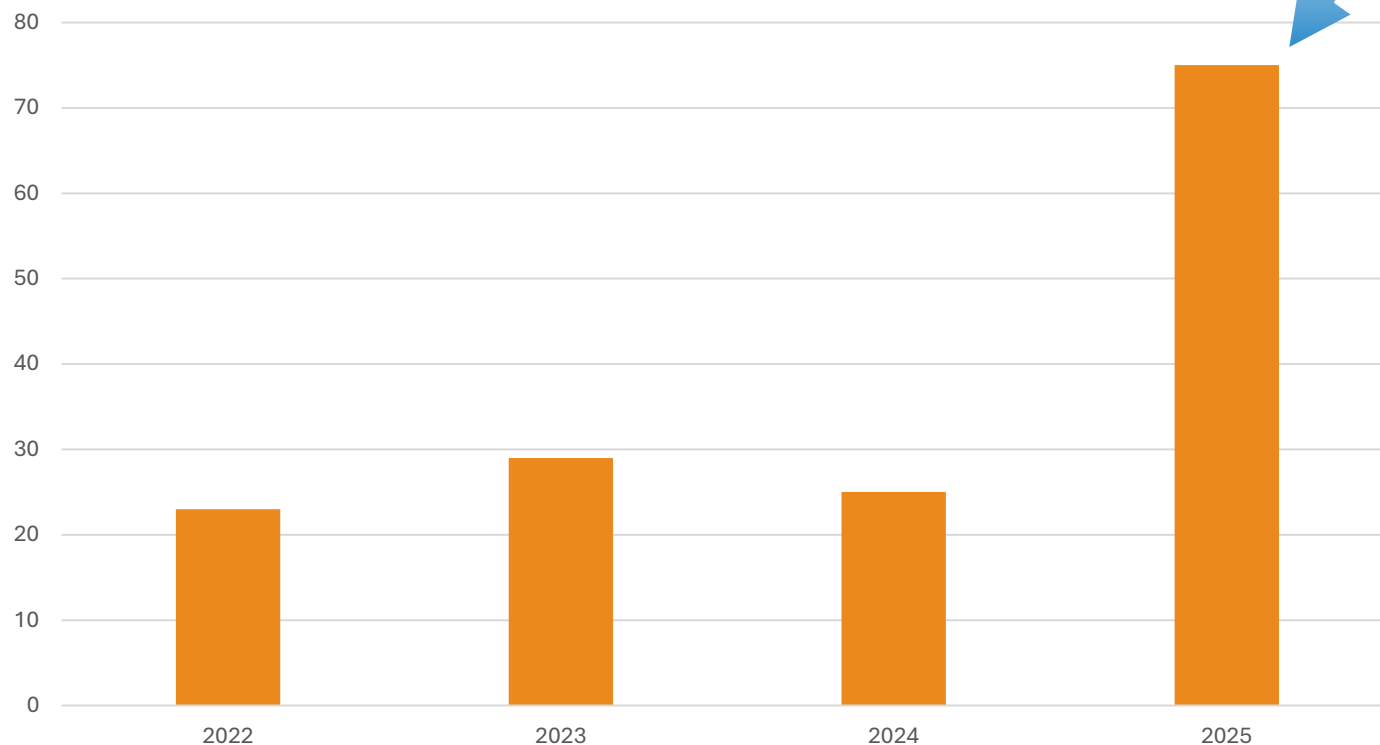


 India, May 2025

An excellent source of protein with a perfect 1.0 protein digestibility corrected amino acid source

# This signal stems not only from consumer data, but product launches with PDCAAS ratings on pack.

Global Product Launches with PDCAAS rating  
January 2022-December 2025



 Greece, 2025

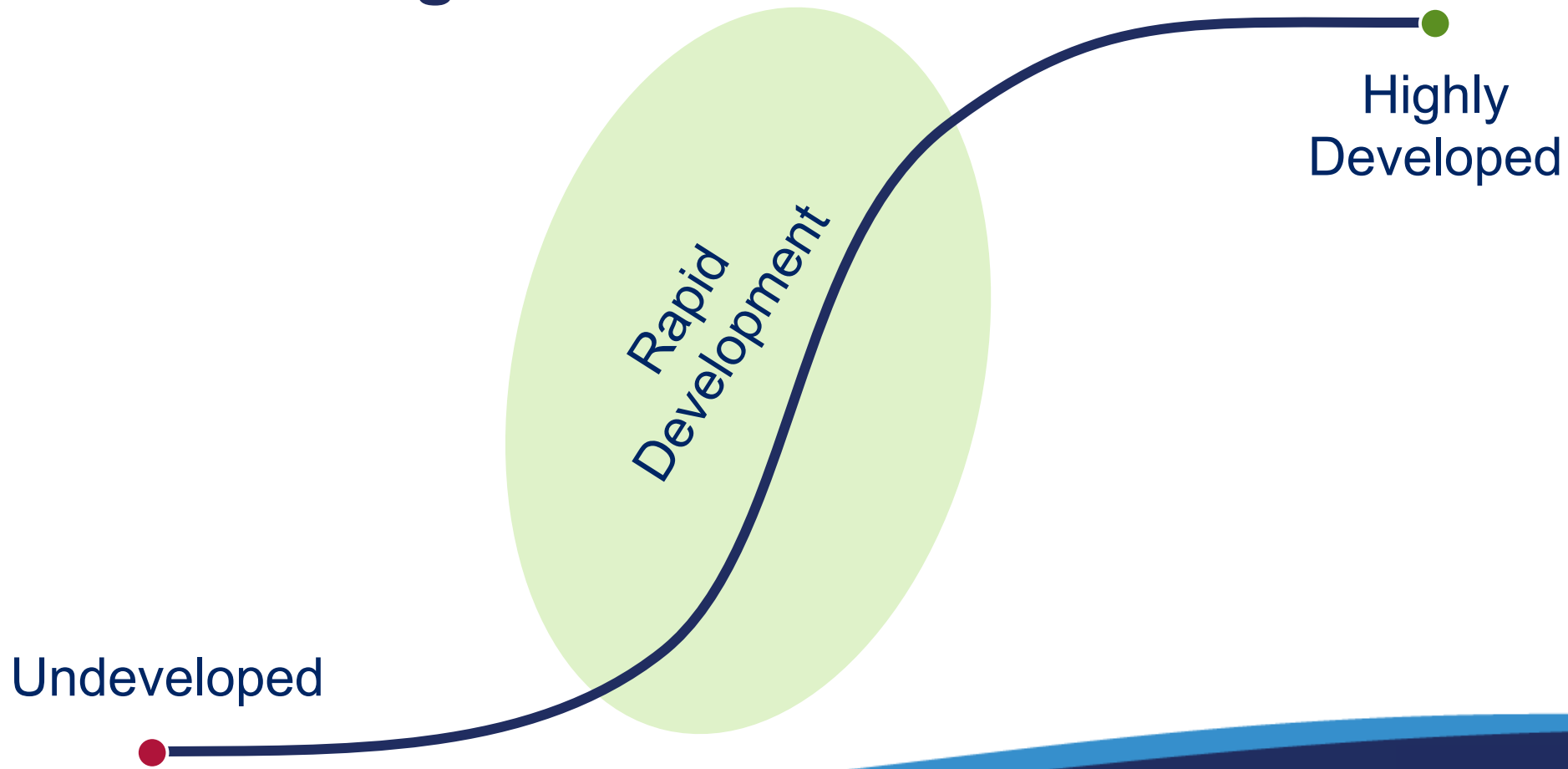
**HSN Evolate 2.0  
Premium Sport  
Nutrition Sports  
Powder**

**Claims:** 100% isolated whey protein. Recognized as the highest nutritional quality protein: high biological value and PDCAAS.

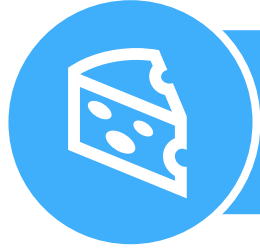


# Opportunities

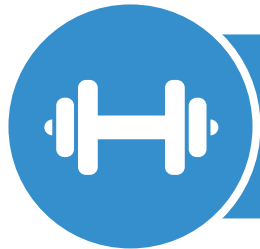
**Opportunities look different depending on where a market sits on the S-curve, and each stage opens the door to a different kind of growth.**



**However, there are a few common themes we are watching across markets.**



Shifts to natural cheese



Protein into mainstream foods

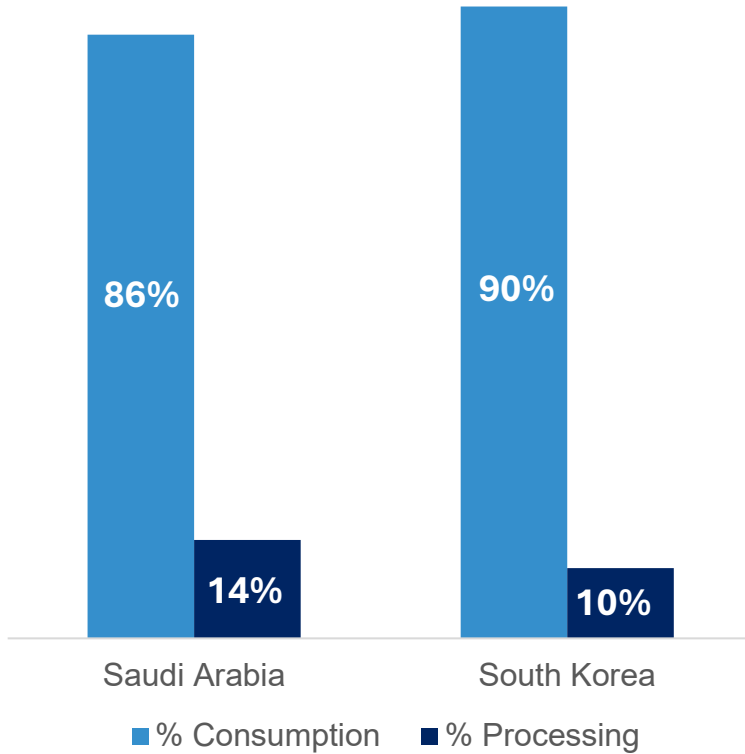


Expansion of dairy-based drinks



# Shifts to natural cheese

Total Cheese Imports:  
% Consumed vs. % For Processing



## Saudi Arabia



## South Korea





# Protein into mainstream foods



📍 Saudi Arabia  
Feb 2025

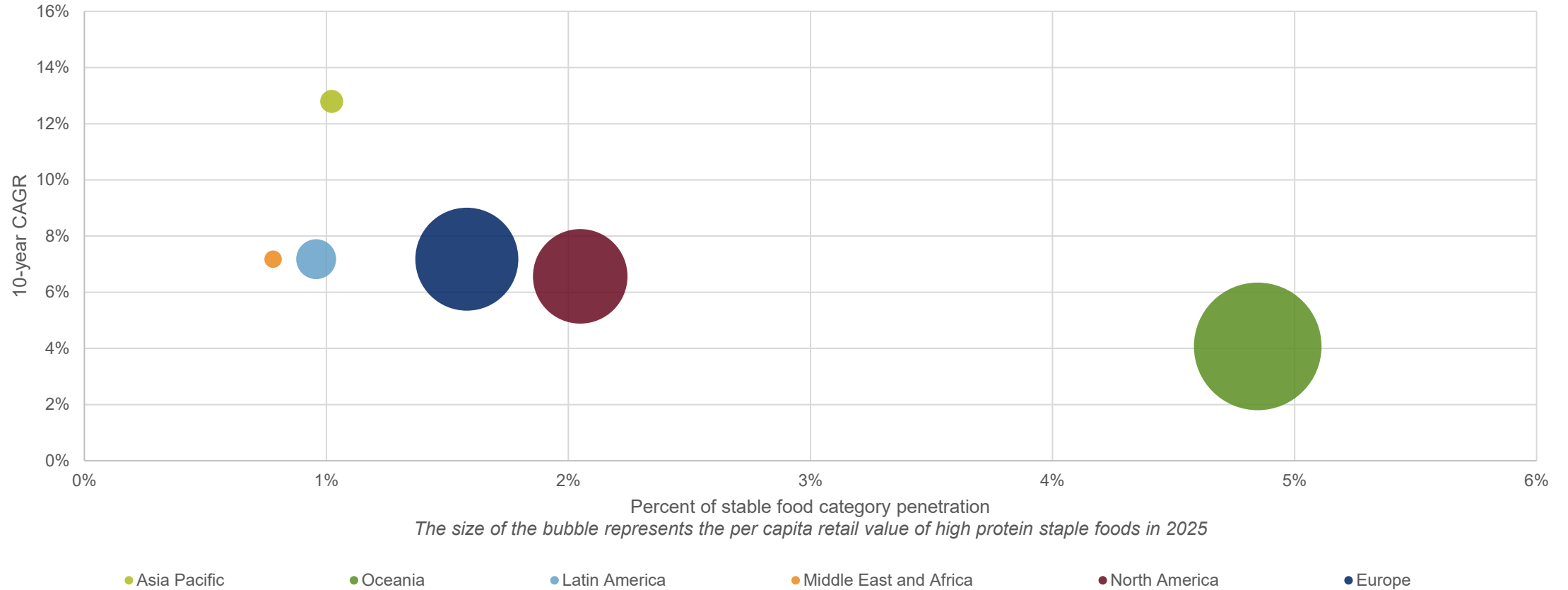


📍 Australia  
Feb 2025



# Protein into mainstream foods

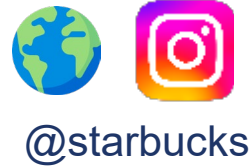
Retail Value High Protein Staple Foods 2025 Per Capita



Source: Euromonitor Passport Health and Wellness. Fixed 2024 exchange rates, Innova New Product Launches



# Expansion of dairy-based drinks



**5M** **71k**  
views likes



**30k** **300**  
views likes