



# VEGAN DELICIOUSNESS

Inspiring Flavour Creations for vegan Ice Cream

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# Vegan Market & Lifestyle Trends

**Contemporary vegan: consumers add artistic presentations to plant-based foods for contemporary appeal**

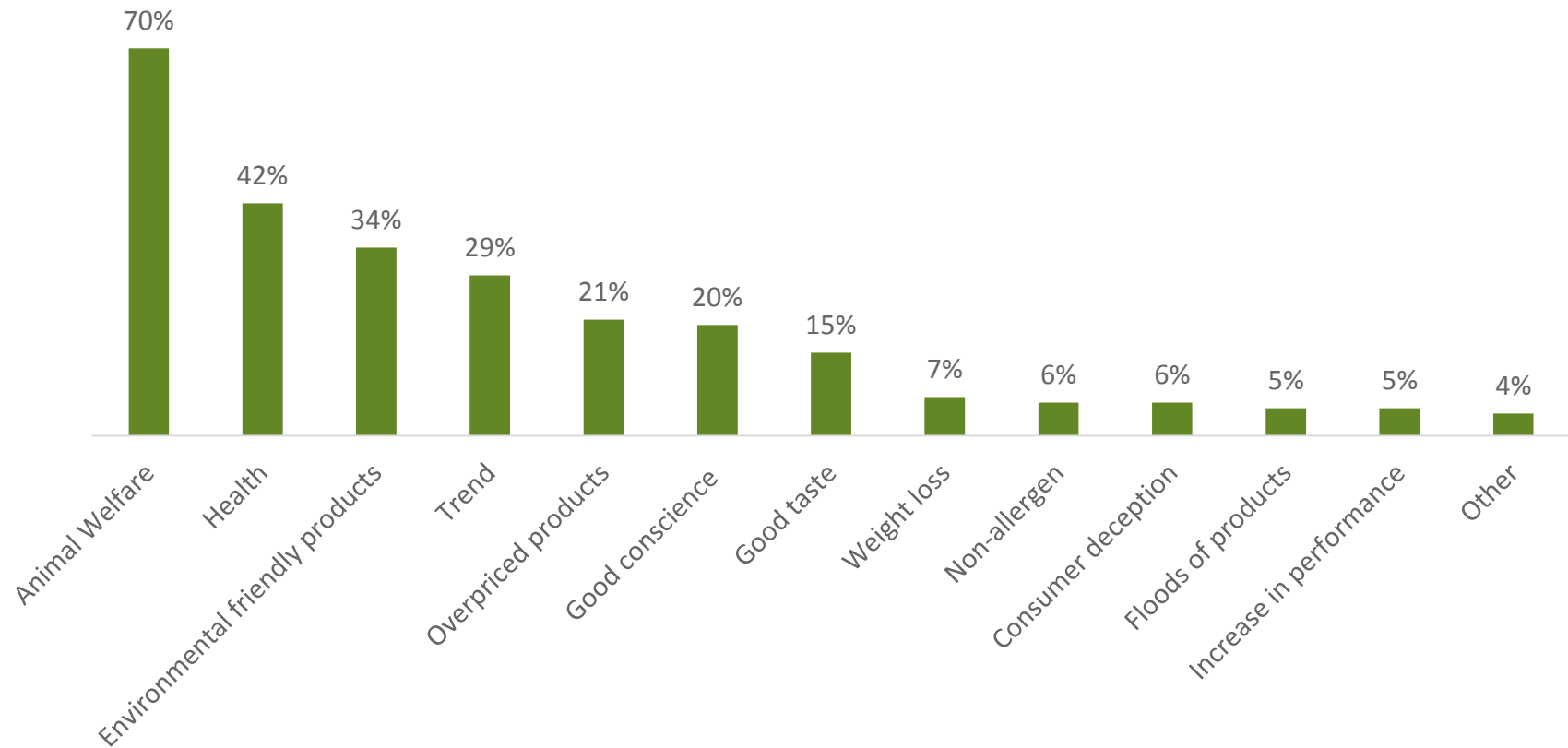
Playing with color and food form, consumers are transforming traditional vegan meals into more aesthetically intriguing dishes.



# Vegan Market & Lifestyle Trends

## What do you associate with vegan products?

(Germany, 2016)



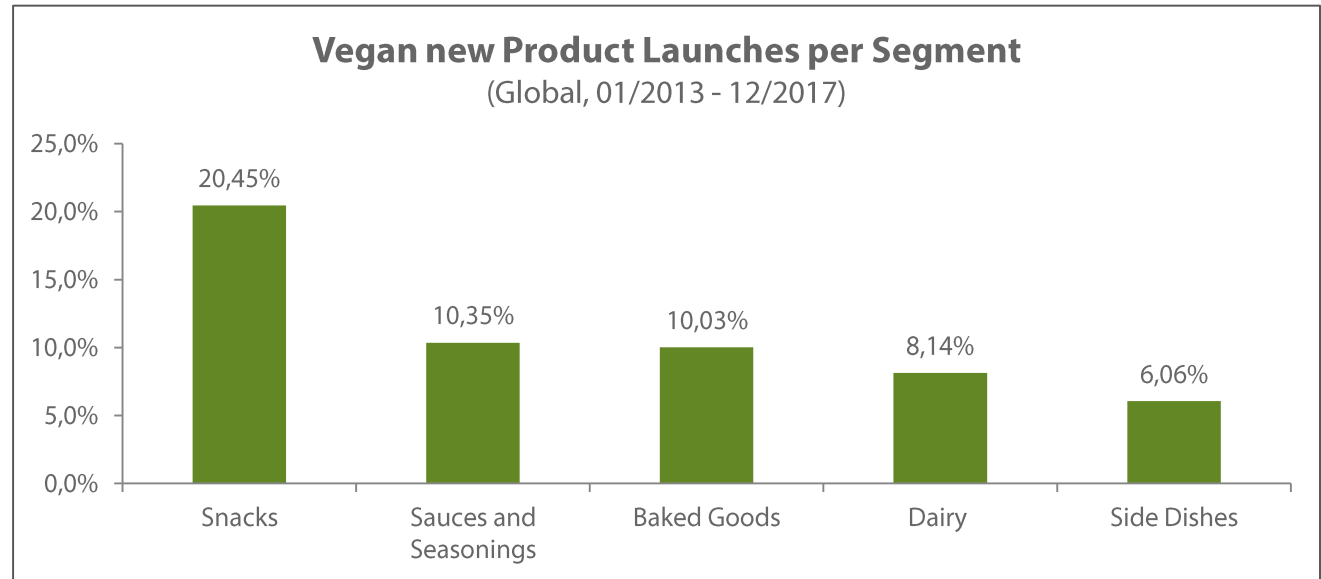
# Vegan Market & Lifestyle Trends

While vegan is a hot market worldwide, it seems that Germany is the leading country for vegan product innovations globally.

- According to Mintel, Germany was the leading market for vegan food and drink product launch activity in 2017.
- The only country coming close to this amount was the United States, where 13% of all new global vegan food and drink products were launched, followed by the UK with 11% global share.



# Vegan Market & Lifestyle Trends



Globally, consumers value vegan products within the **savoury** and **sweet** segment.

**Top 5** categories include:

- Snacks
- Sauces and seasonings
- Baked goods
- Dairy products
- Side dishes

# Consumer Trend: Dairy-free Dairy

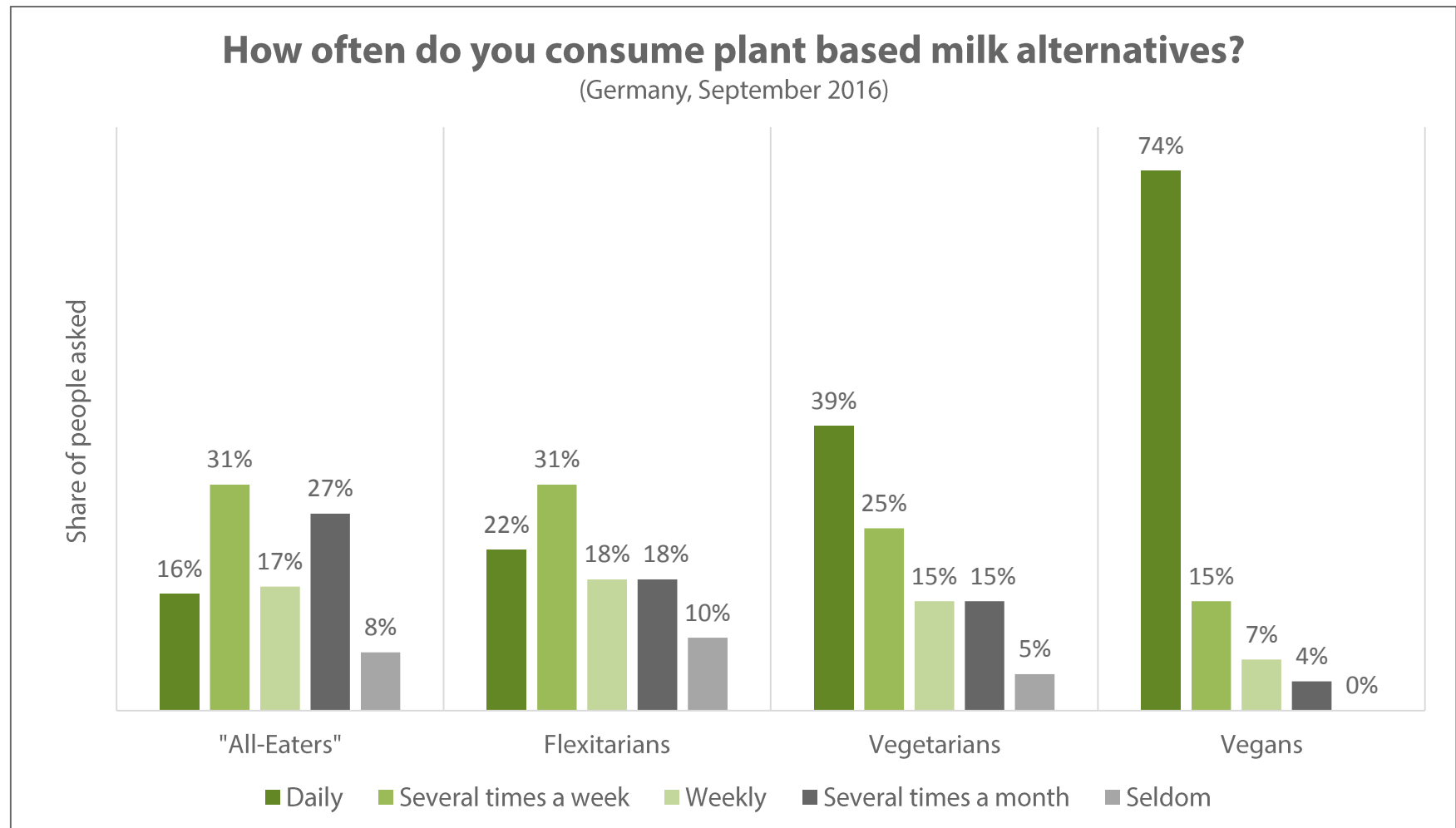
## Milk Markets move



Dairy products have been an important part of the human diet for the past centuries.

With the ongoing **vegan trend** and the increasing number of people being **allergic to milk substances**, the **demand** for dairy-free **alternatives** **increased** due to dietary reasons.

# Consumer Trend: Dairy-free Dairy



## Consumer Trend: Dairy-free Dairy



White almond, coconut and soya drinks are the most popular types of non-dairy milk-substitutes. The ones based on other nuts and plants, such as rice, oat and hazelnut have gained attention on the market recently and are becoming more and more popular.

“Milk” is legally defined as a product originating from animals. Plant based alternatives are therefore referred as “Drinks”. The only exception is coconut milk, which is a blend of coconut meat plus water.

# Consumer Trend: Dairy-free Dairy

NPD for Dairy-free Dairy // **Global** (01/2013 - 12/2017)

| Top Countries | Variants (% of series) |
|---------------|------------------------|
| USA           | 21,3%                  |
| UK            | 11,4%                  |
| Germany       | 4,5%                   |
| Canada        | 4,0%                   |
| Mexico        | 3,4%                   |
| South Africa  | 2,9%                   |
| Spain         | 2,9%                   |
| Netherlands   | 2,7%                   |
| New Zealand   | 2,7%                   |
| Thailand      | 2,6%                   |

Total number  
of launches:

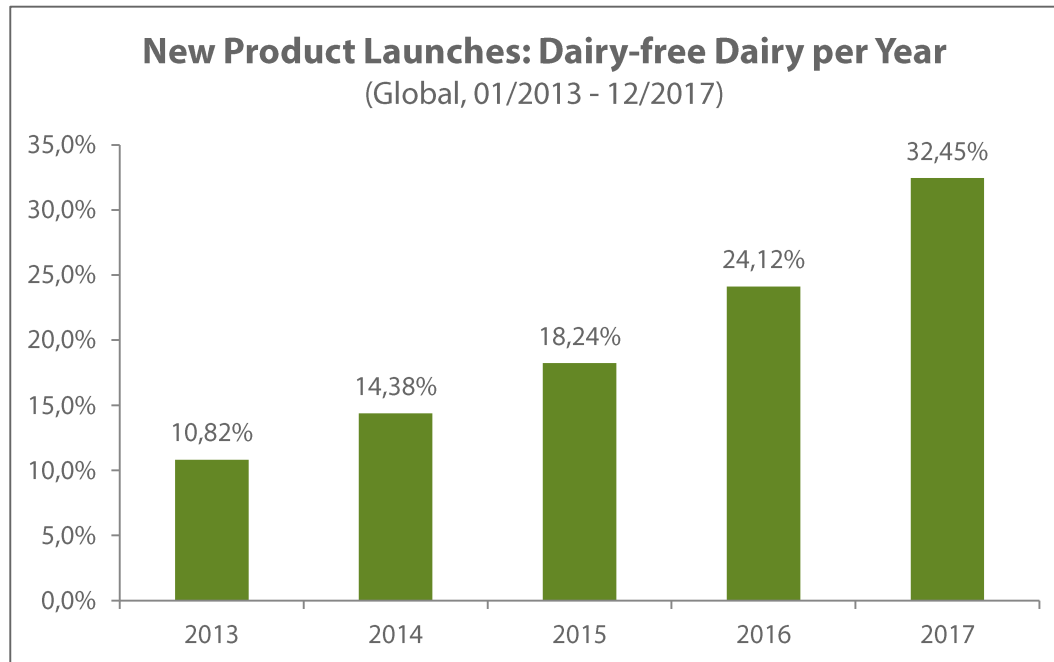
2.330

Branded  
90,9%

Private Label  
9,1%

| Launch Type                 | Variants (% of series) |
|-----------------------------|------------------------|
| New Product                 | 38,2%                  |
| New Variety/Range Extension | 28,8%                  |
| New Packaging               | 24,0%                  |
| Relaunch                    | 7,1%                   |
| New Formulation             | 2,0%                   |

# Consumer Trend: Dairy-free Dairy



Taking a closer look into new product launches in the past five years, an **emerging trend** towards **dairy-free dairy products** globally is clearly visible.



## Consumer Trend: Dairy-free Dairy



**Simply Veggifood, Portugal** | Vegan Deli Vegetal Vegan Mozzarella Cheese Slices are said to be a dairy-free cheese alternative that melts just as a regular cheese and contains coconut & rapeseed oil as well as natural x flavours, instead of dairy products to define its sensory profile.



**Nemléko, Czech Republic** | Almond Not-Yoghurt is a plant based yoghurt alternative. It contains no milk, instead, almond drink (including almond & date) and live yoghurt cultures are used here. In addition, the product claims to be free from sugar, gluten, soya or additives.



**Califia Farms, USA** | Choc-A-Maca Protein Almond Drink contains 8g of protein originating 100% from plants. This pasteurized drink is also made with 1000 mg maca from Peru and is free from gluten, carrageenan, dairy, soya and GMO.

## Dairy-free Ice Cream - Category Highlight

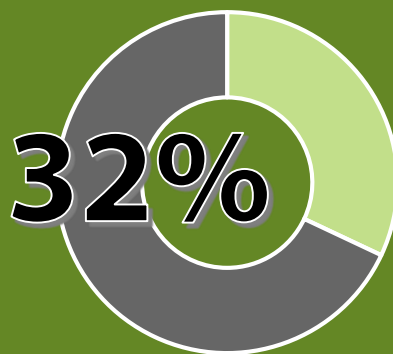
Consumer's interest in health & wellness is driving the popularity of plant-based foods. Dairy-free ice cream is benefiting from this as it moves from the fringe to mainstream.

**With an accelerating trend towards veganism, the demand for indulgent food that meet consumers' approach to life will continue to gain traction.**



## Dairy-free Ice Cream - Category Highlight

Non-dairy ice creams have improved a lot in terms of ingredients influencing **taste** plus **texture**, proving that dairy-free innovation does not mean low **indulgence**.



In 2017, 32% of the products launched within the ice cream category globally claim to be vegetarian/vegan and are therefore dairy-free.

# Dairy-free Ice Cream - Top Flavours & Claims

Top Flavours // **Global** (01/2013 - 12/2017)



Chocolate 12,7%



Vanilla 11,5%



Coconut 3,9%



Cocoa/Cacao 3,7%



Strawberry 3,2%



Raspberry 2,3%

# Dairy-free Ice Cream - Top Flavours & Claims

Top trending Flavours // **Global** (01/2013 - 12/2017)



Coconut +800%



Almond +200%



Cocoa/Cacao +100%



Fudge +100%



Brownie +100%

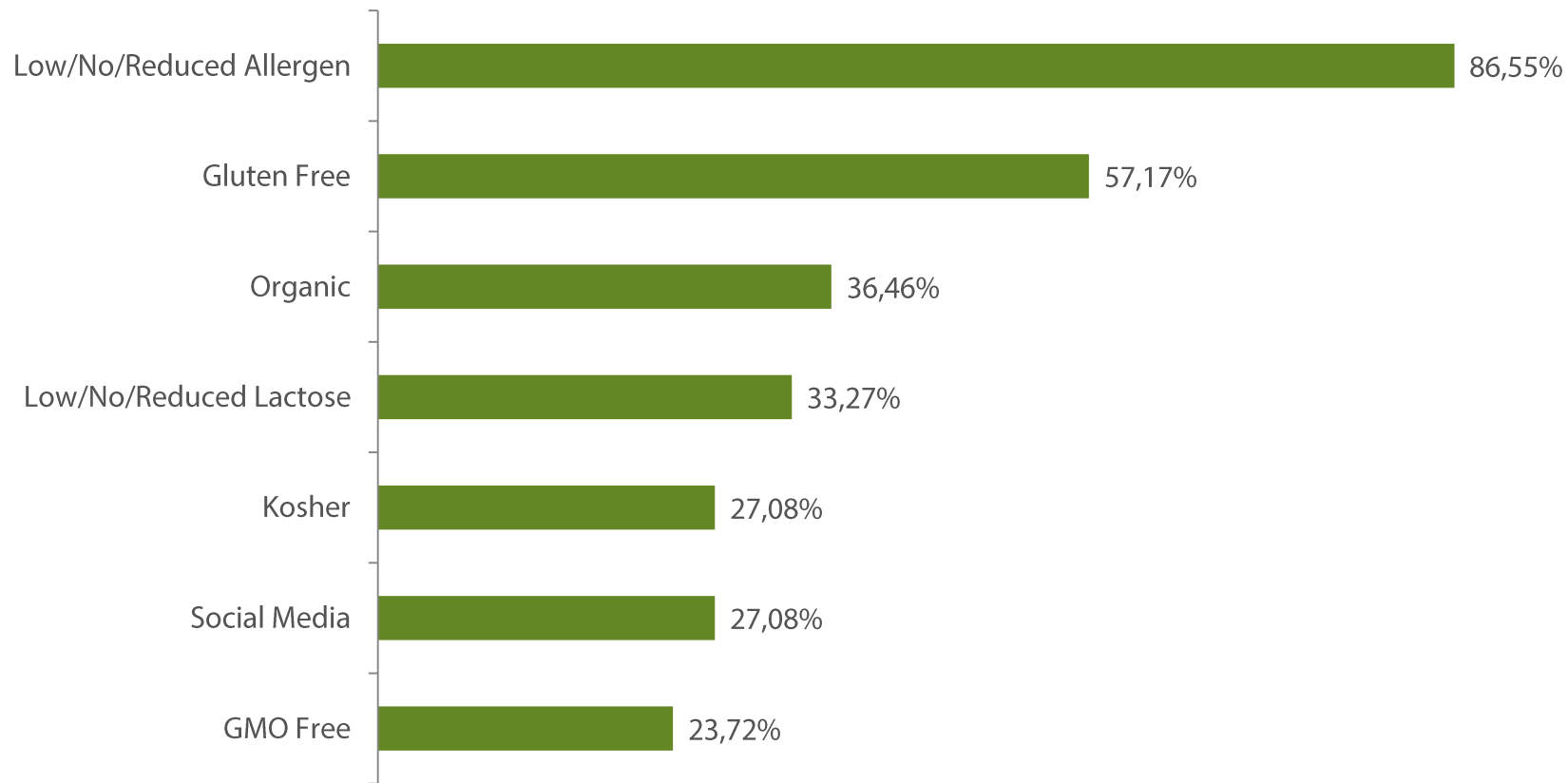


Walnut +100%

# Dairy-free Ice Cream - Top Flavours & Claims

## Top Claims of new Products: Vegan Ice Cream

(Global, 01/2013 - 12/2017)



# Dairy-free Ice Cream - Market Insights



**Phat Fox Frozen, South Africa** | Fun Chocolate Orange Dairy-free Frozen Dessert is free from added sugar, preservatives as well as artificial flavours and suitable for vegans. Instead of dairy, coconut milk and cream is used to ensure the smooth texture. The dessert features a spoon in the lid, and has Facebook, Twitter and Instagram logos on pack.



**Ben & Jerry's, Sweden** | Chocolate Fudge Brownie Non-Dairy Ice Cream is vegan as well as kosher certified, made with almonds, and contains chocolate brownies from New York's Greyston Bakery, which helps to provide jobs and training for low-income city residents.



**Choice, Finland** | Lovely Vanilla Dairy-free Ice Cream is free from dairy, lactose plus soya and is suitable for vegans. Instead of a dairy basis, a rice one is used in order to exclude soya from the product, as it is perceived as controversial sometimes.

# Dairy-free Ice Cream - Market Insights





## Vegan Deliciousness

Get in touch with taste and discover Bell's inspiring flavour creations for vegan ice cream.

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## Vegan Deliciousness - Inspiring Flavour Creations for vegan Ice Cream

- **Tasty** flavour profiles, designed to deliver excellent results in vegan as well as ice cream containing dairy
- **All natural** and **vegan** flavours that are in-line with today's consumer expectations and labelling restrictions
- **Consistent quality** and **intense notes** that can be used to define or for refining your ice cream product
- Suitable for a **variety** of **dairy applications**, next to ice cream, e.g. milk shakes or vegan milk shakes
- **Innovative inspirations** for extending your product portfolio and invigorating the marketplace

## APPLICATION FORMULA VEGAN ICE CREAM:

### Ingredients:

|                                       |              |
|---------------------------------------|--------------|
| Ricedrink                             | 69,44 g      |
| Coconut fat                           | 7,64 g       |
| Saccharose                            | 12,5 g       |
| Dextrose                              | 5,9 g        |
| Inulin                                | 3,47 g       |
| Mono- and diglycerides of fatty acids | 0,49 g       |
| Carob gum                             | 0,21 g       |
| Guar gum                              | 0,21 g       |
| Salt                                  | 0,14 g       |
| Bell Flavours in recommended dosage   | x g          |
| <b>Total</b>                          | <b>100 g</b> |

### Preparation:

1. Heat up coconut fat together with ricedrink until the fat is entirely melted
2. Incorporate the dry ingredients into the liquid phase with a blender and ensure all dry compounds are dissolved
3. Add Bell Flavour in recommended dosage
4. Heat the premix to 80 °C in a water bath
5. Let the premix cool and refrigerate (approx. 7°C) for 16 hours
6. Homogenize the premix again with a blender and apply it to the ice cream machine

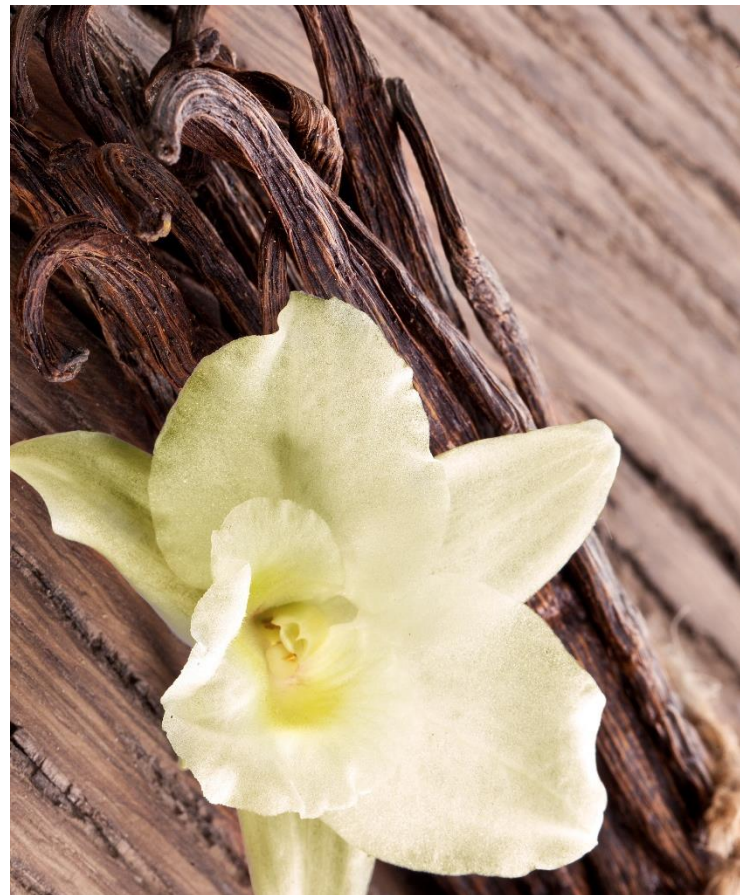
This formulation is for laboratory demonstration only. It is based on information, methods and practices which are, to the best of our knowledge, accurate and reliable. As conditions of processing and use are beyond our control, we can make no guarantees or warranties, nor can we assume any responsibility as to results obtained. Processors or users should determine applicability and suitability for their own purposes.

# Sweet Vanilla

5280031                      Vanilla Flavour

Dosage:                      0,20 : 100

Declaration:                Natural Flavouring,  
                                      halal-conform,  
                                      vegan/vegetarian\*



Vanilla is one of the most well-known flavours worldwide and is just an all time classic, with its creamy, sweet taste.

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# Fudge & Walnut

0528268 Fudge & Walnut Flavour

Dosage: 0,15 : 100

Declaration: Natural Flavouring,  
halal-conform,  
vegan/vegetarian\*

These slightly nutty, creamy and buttery notes in combination with slightly melting ice cream will put a smile in everyone's face.



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# Creamy Coconut

5780002                      Coconut Flavour

Dosage:                      0,15 : 100

Declaration:                Natural Flavouring,  
                                      halal-conform,  
                                      vegan/vegetarian\*

This very trendy flavour with its creamy sweet notes creates a real summer holiday feeling.



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## Chocolate & Orange

5200193 Chocolate Flavour

Dosage: 0,15 : 100

Declaration: Natural Flavouring,  
halal-conform,  
vegan/vegetarian\*

5280019 Orange Flavour

Dosage: 0,08 : 100

Declaration: Natural Flavouring,  
halal-conform,  
vegan/vegetarian\*

Sweet notes of chocolate are combined with juicy, fruity orange hints and form a harmonic combination.



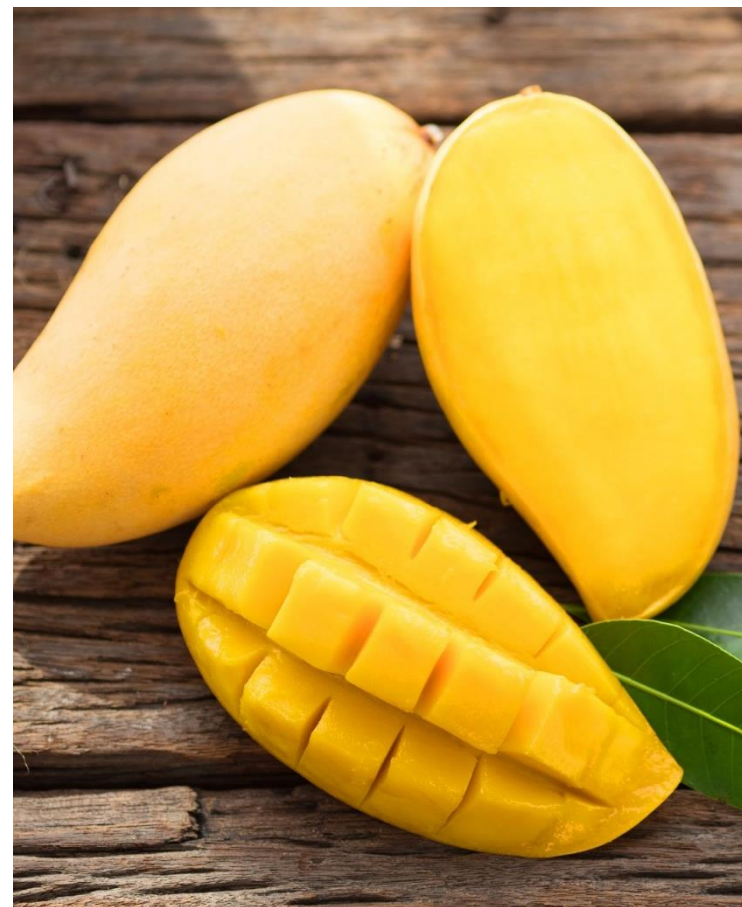
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# Tropical Mango

5600143 Mangoshake Flavour

Dosage: 0,15 : 100

Declaration: Natural Flavouring,  
halal-conform,  
vegan/vegetarian\*



These sweet ripe mango notes will take your senses on a journey towards exotic tropical spheres.

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# Peach & White Chocolate

0528572 Peach Flavour

Dosage: 0,12 : 100

Declaration: Natural Flavouring,  
halal-conform,  
vegan/vegetarian\*

5600144 White Chocolate Flavour

Dosage: 0,18 : 100

Declaration: Natural Flavouring,  
halal-conform,  
vegan/vegetarian\*

A well balanced combination of ripe peach  
flavour and sweet milky notes of creamy white  
chocolate.



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# Brownie & Black Cherry

5600145 Brownie Flavour

Dosage: 0,12 : 100

Declaration: Natural Flavouring,  
halal-conform,  
vegan/vegetarian\*

0528621 Black Cherry Flavour

Dosage: 0,08 : 100

Declaration: Natural Flavouring,  
halal-conform,  
vegan/vegetarian\*

A classic combination well known from chocolate confectionary: Brownie's rich, sweet cocoa notes meet juicy slightly kernel black cherry.



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# Blueberry & Cheesecake

0527011      Blueberry Flavour

Dosage:      0,06 : 100

Declaration:      Natural Flavouring,  
halal-conform,  
vegan/vegetarian\*

5680026      Cheesecake Flavour

Dosage:      0,30 : 100

Declaration:      Natural Flavouring,  
halal-conform,  
vegan/vegetarian\*

Inspired by the bakery segment: Juicy, fresh blueberries merged with creamy cheesecake and rounded off by a hint of lemon and vanilla.



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## Contact

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