Milk boom without milk?

More contexts lead to more everyday relevance

→ Milk makes the difference" was once the slogan of a CMA campaign. In family contexts of nuclear families with many children, milk had just as important a place as honey, stew and aspic as a staple food for adolescents. However, families have become smaller (and rarer), food culture has changed and milk is not necessarily a beverage all-rounder in the everyday life of today's average Central European.

Sny buzzwords such as "milk lake" and "butter mountains" are a thing of the past, and renewable consumers are the key. Consumer generations don't even know such unenjoyable irritant words from hearsay.

The EU-subsidised milk lake in Germany has dried up in the meantime and the price of butter has risen to a record high of well over 3 euros for 250 g of branded butter. Worldwide demand for dairy products has even increased dramatically in recent years: from 95.8 kg in 2001 to 116.8 kg per capita in 2021 according to the FAO force cast. The effects of the Ukraine war are driving the price spiral even higher. How can it then be that the FAZ headlines on 2 May: "Milk consumption lower than at any time in the last 30 years"?

The creeping decline of the dairy culture

In fact, milk consumption in Germany - as in other developed countries - is steadily declining. In the last 30 years alone, per capita consumption has fallen by almost 20 litres a year **(Fig. 1)**.

Milk has become unsexy. The daily glass of milk is an image for the nostalgic. In everyday life, generations have disappeared...

The contexts in which milk is used have disappeared and the next generations prefer to drink pancen milk rather than cow's milk. Breakfast with Kaba, Caro & Co. no longer takes place together with the family at the kitchen table, but on the way to go or is even cancelled altogether.

Once the children are at school, they prefer soft drinks, smoothies and the like instead of the school milk that was almost institutionally prescribed in my childhood. In adolescence, yoghurt & co. are more tempting than "long-life" milk, and protein shakes have replaced milk for athletes. Milk is therefore becoming less and less relevant to everyday life. Every now and then a muesli or a modern porridge, a cappuccino or latte macchiato in between, but that's it!

In addition, a wide range of dairy free milk alternatives and dairy free drinks have conquered the supermarket shelves and the hearts of mostly younger, urban and trendy consumers. Nutritional trends such as healthy food, superfoods, veggies, organic and sustainability reinforce these developments.

Healthier milk without a cow

With the increase in food allergies and lactose intolerances in Western societies, the triumphal march of plant-based milk alternatives has begun from Asia. The production of soy milk was already known over 2000 years ago at the time of the Han dynasty in China.

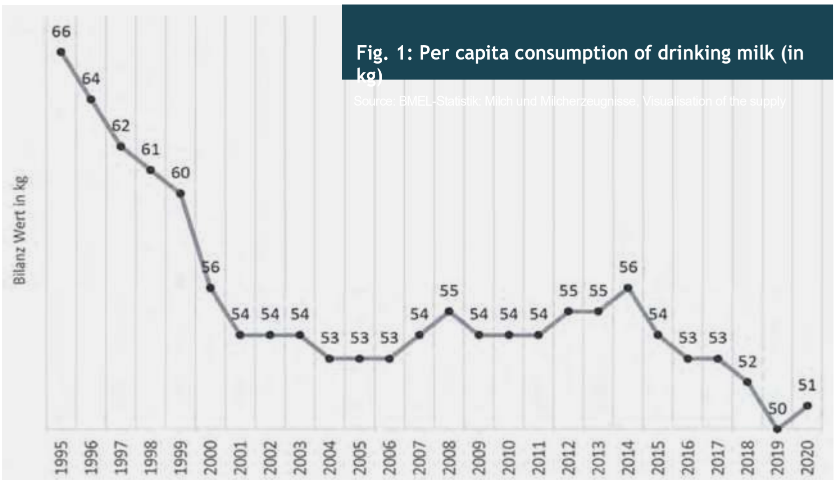

Fig. 1: Per capita consumption of drinking milk (in kg)
Source: BMEL-Statistik: Milch und Milcherzeugnisse, Visualisation of the supply

The first commercial soy milk was developed in Hong Kong around 1940, at that time still with a typical bean-like taste. The global market growth for soy milk in Asia began in the 1970s and 80s, after which a better taste profile could be developed through technical developments in production. Other milk alternatives such as coconut milk are also traditional ingredients in the kitchen.
The food of South and South-East Asia found its way into everyday life in Europe as globalisation progressed and Asian dishes became more attractive.

With the emerging health trend in the USA between the 1990s and 2000s, more plant-based dairy alternatives have been developed. The majority of products on the market use soy as a base, followed by nuts (such as almond, cashew, hazelnut and peanut), cereals (such as oats, spelt, quinoa, millet, etc.). But also rice, coconuts and now even hemp,
Lupins or peas are used as milk substitutes. The

Market for "pftanzenmilch", which is no longer allowed to be called milk after the ECJ ruling of 2017, is growing rapidly **(Fig. 2)**.

The initial drivers for the consumption of plant-based milk alternatives were better tolerance (lactose-free) and health concerns about cow's milk. In the meantime, environmental concerns, climate aspects (methane, CO_2) and animal welfare have come to the fore. This is in line with general nutritional trends, such as vegetarian or vegan diets and the increase in flexitarians. Moreover, with their different ingredients and slightly sweet taste, plant-based milk alternatives offer variety and enjoyment in everyday life. According to Cargill 2018, 54 per cent of Europeans said they already use plant milk - although not exclusively.

The global market value of alternative dairy products is currently estimated at USD 31.3 billion. However, based on the calculations of a study published in January 2022, it is expected that the

Fig. 2: Sales of plant-based milk substitutes in Germany
Sales volume of plant-based milk substitutes in Germany from 2018 to 2020 (in million l)
Source: Smart Protein project; Nielsen Plant-Based Foods in Europe 2021: How big is the market?, page 90, March 2021

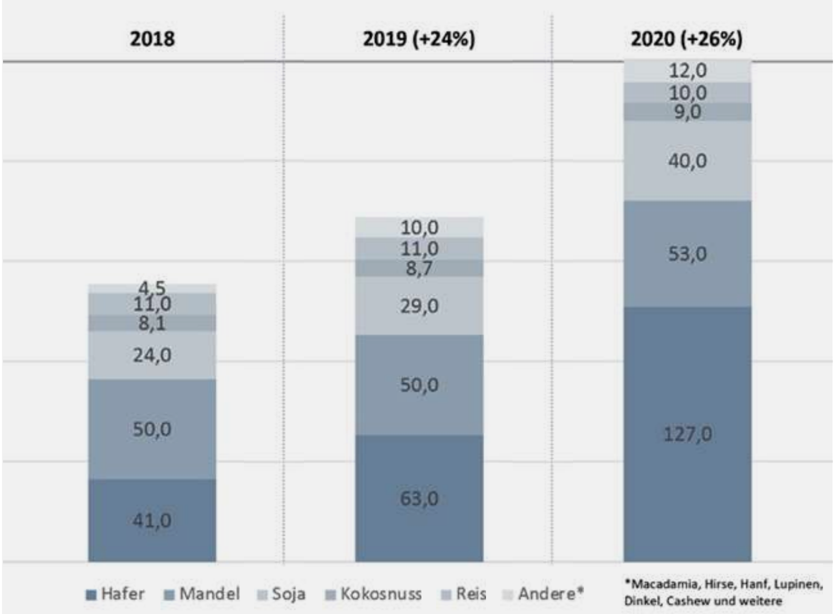

Fig. 3: Selection of hemp or oat drinks with hemp

According to a market study by Future Market Insights (FMI), this will rise to over USD 123 in 2032 - with annual growth rates of up to 14.7 percent. Due to partial negative associations with the production of milk substitutes (e.g. deforestation of the rainforest through soy intensive cultivation), shifts within the category will take place. Pftanzli-cal milk alternatives enjoy the reputation of being a healthy food, but they are not a proper substitute for milk, i.e. they are not a milk substitute from a nutritional-physiological point of view. The products on the market vary greatly in terms of their nutrient content and contain
compared to cow's milk in some cases. little protein or vitamins that have to be added artificially. Generally speaking, soft milk alternatives are an artificial imitation with a high degree of processing: with the addition of salt, oil and possibly sugar as well as additives (flavours, stabilisers, emulsifiers, etc.), a product similar to milk is produced through the use of enzymes.

The most popular brands in Germany in 2021 according to the number of online mentions were Alpro from the Danone Group, followed by Oatly and far behind the Dairy-free-milk own brands of the LEH. Oatly from Sweden, in particular, is considered a pioneer and trendsetter: existing since 2001, they describe themselves as "the inventors of the oat drink and the pioneers of the oat drink".
re of the post-milk generation" to aim for a "Rev-OAT-lution in Germany" since 2017.

Fig. 4: Selection of alcoholic and non-alcoholic drinks with hemp

Hemp drinks - the somewhat different alternative to milk?

In the meantime, there is such a rich offer of plant-based milk alternatives on the market, which can often be bought in organic quality and rely on regional cultivation such as spelt or oats. In the course of this, at the beginning of the year Germany's first
"Hemp milk" made the headlines, but not only with the slogan "We milk hemp seeds instead of cows", but also with a court battle over the name "Milck". This is too reminiscent of milk and may not be used even in combination with the brand name "Hemi". So far, the demand for hemp beverages is still low and there are only a few milk age-
natives on the market that are based purely on hemp **(cf. Fig. 3).** Hemp has at least made its way onto the shelf of plant-based milk alternatives as an additional ingredient in oat drinks.

Hemp drinks score points over other plant-based milk alternatives in a number of aspects, not only the pleasantly nutty taste. They contain healthy omega-3 and omega-6 fatty acids, virtually no sugar in the unjuiced version, and if hulled hemp seeds are used, valuable components such as potassium, magnesium and essential amino acids make it directly into the hemp drink and do not have to be filtered out. Hemp is also one of the oldest cultivated plants. free and resistant to pests and thus ideally suited for regional organic cultivation.

Although it should be common knowledge by now that the hemp products on the market do not naturally contain cannabi- noides (THC, CBD), the hemp trend does not seem to have reached the beverage shelves yet. Hemp still seems a bit wicked and is associated with intoxicants or "smoking pot". Even numerous soft drinks or alcoholic hemp drinks continue to remain in the niche and do not make a broad breakthrough into the everyday life of the beverage mainstream **(Fig. 4)**.

An engagement with products and brands always depends strongly on the contextual conditions: Hemp drinks, but also other milk alternatives and milk itself are experienced, shared and possibly ritualised in the peer group context, which reinforces occasions for repeated consumption. The prevailing contextual conditions are the key to our attention and later behaviour.

More contexts for more everydayness

All plant-based milk alternatives, and especially newcomers such as hemp milk, are not a sure-fire success despite the market development over the last few years. Simply jumping on a trend can also cause flops, as the example of Innocent has shown: the "plant milk" drinks launched in 2019 are not very popular. very quickly disappeared from the shelf again. Too unsuccessful - who drinks pure plant milk like a smoothie? Who uses the shot as an alternative to the milk glass, which has been contextually forgotten as a breakfast drink?

But even milk would have all the chances of rediscovery in its own hands: Regionality is still "in", "natural rurality" with "happy" cows are dream worlds of a harmonious and intact living environment. Milk and other dairy products also fit into this context. How products with holiday associations, forgotten everydayness or new occasions for consumption can quickly and easily find their way into the consumer's everyday life is the task of those responsible for marketing.
More contexts, more visibility of products also leads to more everyday relevance. And corresponding market success. Dairy successes can also be dairy-free in the future, but they don't have to remain indispensable!

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