

Yogurt and Yogurt Drinks - UK - July 2014

Report Price: £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



“That half of users of yogurt/yogurt drinks express concern about the sugar content in these highlights the need for the industry to tackle this issue. Trends towards clearer on-pack labelling in the UK will shine more light on the sugar content of yogurts.”

– Amy Price, Senior Food and Drink Analyst

This report looks at the following areas:

- Operators look to address consumer concerns on sugar
- On-the-go occasion provides potential for expanding usage
- Innovation on flavour can help to improve yogurt's positioning as lacking in excitement

Spoonable yogurt continues to dominate the market. Leading operators such as Danone cut back on both NPD (New Product Development) and above-the-line support in 2013, which was reflected in the lacklustre sales performance. Drinking yogurt saw a marked decline in 2013 following EFSA's (European Food Safety Authority) rejection of the probiotic claim in December 2012. While this downward trend is expected to continue in 2014, it will likely be to a much lesser extent.

Operators are unlikely to repeat the flurry of activity seen a couple of years ago and the market is struggling to recruit new users or encourage consumption around new usage occasions. The on-the-go occasion does, however, pose potential for growth.

BUY THIS
REPORT NOW

VISIT:
store.mintel.com

CALL:
EMEA
+44 (0) 20 7606 4533

Brazil
0800 095 9094

Americas
+1 (312) 943 5250

APAC
+61 (0) 2 8284 8100

EMAIL:
oxygen@mintel.com

DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market

Yogurt and Yogurt Drinks - UK - July 2014

Report Price: £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Table of Contents

Introduction

Definition

Abbreviations

Executive Summary

The market

The future

Figure 1: Forecast of UK retail sales of yogurt and yogurt drinks, by value, 2009-19

Figure 2: Forecast of UK retail sales of yogurt and yogurt drinks, by volume, 2009-19

Market factors

Health focus could switch to sugar content

Kids are a lucrative group for yogurt/yogurt drink brands

Predicted rise in consumer spending bodes well for encouraging trading up

Companies, brands and innovation

Müller Corner leads spoonable yogurt, with sales topping £250 million

Figure 3: Estimated UK retail sales of the top five leading brands in adult and children's spoonable* yogurt, by value, 2013

A decline in NPD in 2013

Adspend reaches £53 million in 2013

The consumer

Around two in five associate yogurt/fromage frais and yogurt drinks with naturalness

Figure 4: Correspondence analysis of qualities associated with yogurts and yogurt drinks, April 2014

Almost eight in 10 people eat yogurts

Figure 5: Usage of yogurt, fromage frais and/or yogurt drinks, April 2014

Eight in 10 buy yogurt, standard variants being the most popular

Figure 6: Types of yogurt/yogurt drink bought in the past three months, April 2014

Almost three in five eat yogurt as a dessert

Figure 7: Occasions when people eat yogurt/fromage frais and/or drink yogurt drinks, April 2014

Around two in five eat yogurt/fromage frais as an alternative to other treats

Figure 8: Reasons for eating yogurt/fromage frais and/or drinking yogurt drinks, April 2014

Three in four believe in the nutritious benefits of yogurt/yogurt drinks

Figure 9: Attitudes towards yogurt, fromage frais and yogurt drinks, April 2014

What we think

Issues and Insights

Operators look to address consumer concerns on sugar

The facts

The implications

On-the-go occasion provides potential for expanding usage

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: oxygen@mintel.com

Yogurt and Yogurt Drinks - UK - July 2014

Report Price: £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

The facts

The implications

Innovation on flavour can help to improve yogurt's positioning as lacking in excitement

The facts

The implications

Trend Application

Trend: Guiding Choice

Trend: Play Ethic

Futures Trend: Generation Next

Market Drivers

Key points

Health focus could switch to sugar content

Greek yogurt must be made in Greece

Predicted rise in consumer spending bodes well for encouraging trading up

Kids are a lucrative group for yogurt/yogurt drink brands

Figure 10: Trends in the age structure of the UK population, 2009-14 and 2014-19

Strengths and Weaknesses

Strengths

Weaknesses

Who's Innovating?

Key points

Spoonable yogurts continue dominance

Figure 11: Share of new product launches in the UK yogurt market, by segment, 2010-14

Danone leads innovation, with Tesco chasing

Figure 12: Share of new product launches within the UK yogurt market, by company (top 10), 2010-14

Low/no/reduced fat claim is prominent

Figure 13: Share of new product launches within the UK yogurt market, by selected health claims, 2010-14

Low/no/reduced sugar claims remain niche

Rise of strained and Greek-style yogurt

New entrants

Flavoured variants

Brands leverage protein message...

...potentially broadening appeal to men

NPD on flavour appeals to adventurous consumers

Dessert-inspired

Exotic

Savoury variants

Opportunity to cater to the on-the-go occasion

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: oxygen@mintel.com

Yogurt and Yogurt Drinks - UK - July 2014

Report Price: £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Market Size and Forecast

Key points

Yogurt market sees 14% growth over 2009-13

Figure 14: UK retail value and volume sales of yogurt and yogurt drinks, 2009-19

Forecast

Figure 15: Forecast of UK retail sales of yogurt and yogurt drinks, by value, 2009-19

Figure 16: Forecast of UK retail sales of yogurt and yogurt drinks, by volume, 2009-19

Methodology

Segment Performance

Key points

Spoonable yogurt dominates

Figure 17: UK retail value and volume sales of spoonable yogurt and drinking yogurt, 2009-14

Drinking yogurts continue to see value and volume decline

Market Share

Key points

Müller Corner leads spoonable yogurt, with sales topping £250 million

Figure 18: Estimated UK retail sales of leading brands in spoonable* yogurt, by value and volume, 2012 and 2013

Müllerlight volume sales struggle, with NPD on the cards

Activia loses ground despite new variants

Petits Filous leads kids' yogurt

Danone continues to lead drinking yogurt, despite sales decline

Figure 19: UK retail sales of leading brands in drinking yogurt, by value and volume, 2012/13 and 2013/14

Companies and Products

Danone

Product range

Innovation

Marketing and promotion

Emmi

Product range

Innovation

Marketing and promotion

Müller

Product range

Innovation

Marketing and promotion

Nestlé

Product range

Innovation

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: oxygen@mintel.com

Yogurt and Yogurt Drinks - UK - July 2014

Report Price: £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Marketing and promotion

Yeo Valley

Product range

Innovation

Marketing and promotion

Yoplait

Product range

Innovation

Marketing and promotion

Drinking yogurts

McNeil/Johnson & Johnson

Product range and innovation

Marketing and promotion

Yakult

Product range and innovation

Marketing and promotion

Brand Research

Figure 20: Attitudes towards and usage of brands in the yogurt sector, March 2014

Correspondence analysis

Brand attitudes

Figure 21: Attitudes, by yogurt brand, March 2014

Brand personality

Figure 22: Yogurt brand personality – Macro image, March 2014

Figure 23: Yogurt brand personality – Micro image, March 2014

Brand experience

Figure 24: Yogurt brand usage, March 2014

Figure 25: Satisfaction with various yogurt brands, March 2014

Figure 26: Consideration of yogurt brands, March 2014

Figure 27: Consumer perceptions of current yogurt brand performance, March 2014

Brand recommendation

Figure 28: Likely recommendation of selected yogurt brands, March 2014

Brand Communication and Promotion

Key points

Yogurt continues to dominate adspend

Figure 29: Advertising expenditure in the UK yogurt and yogurt drinks market, 2010-14

Danone remains the leading advertiser

Figure 30: Advertising expenditure in the UK yogurt and yogurt drinks market, by top 10 advertisers (sorted by 2013), 2010-14

Müller reduces spend in 2013

Yoplait increases spend in 2013

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: oxygen@mintel.com

Yogurt and Yogurt Drinks - UK - July 2014

Report Price: £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 31: Share of advertising expenditure in the UK yogurt and yogurt drinks market, by top 10 brands, 2013

Channels to Market

Key points

Multiples dominate, with more than 90% share

Figure 32: UK retail value sales of yogurt and yogurt drinks, by outlet type, 2010-13

The Consumer – Qualities Associated with Yogurt and Yogurt Drinks

Key points

Around two in five associate yogurt/fromage frais and yogurt drinks with naturalness

Figure 33: Correspondence analysis of qualities associated with yogurts and yogurt drinks, April 2014

Figure 34: Qualities associated with yogurts and yogurt drinks, April 2014

Yogurt/fromage frais is seen most widely to provide value for money

Over-65s see yogurt drinks as providing value for money

Just a fifth see yogurt/fromage frais and yogurt drinks as high quality

Less than a fifth say yogurt keeps them fuller for longer

Methodology

The Consumer – Usage

Key points

Almost eight in 10 people eat yogurts

Figure 35: Usage of yogurt, fromage frais and/or yogurt drinks, April 2014

Nearly a fifth eat yogurt once a day or more

Figure 36: Frequency of eating/drinking yogurt, fromage frais and/or yogurt drinks, April 2014

Usage of fromage frais and yogurt drinks is less frequent

Figure 37: Those drinking yogurt drinks once a day or more, by presence of children, April 2014

The Consumer – Purchasing Habits

Key points

Eight in 10 buy yogurt, standard variants being the most popular

Figure 38: Types of yogurt/yogurt drink bought in the past three months, April 2014

Figure 39: Purchasing of kids' yogurt in the past three months, by presence of own children, April 2014

Half buy just one or two types

Figure 40: Repertoire of types of yogurt/yogurt drink bought in the past three months, April 2014

Low fat is the most popular variety, bought by more than six in 10

Figure 41: Varieties of yogurt/yogurt drink bought in the past three months, April 2014

Greek-style variants are almost as popular as Greek yogurt

The Consumer – Occasions

Key points

Almost three in five eat yogurt as a dessert

Figure 42: Occasions when people eat yogurt/fromage frais and/or drink yogurt drinks, April 2014

Snacking is the second most popular occasion

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: oxygen@mintel.com

Yogurt and Yogurt Drinks - UK - July 2014

Report Price: £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

- Yogurts fail to tap into the on-the-go occasion
- Breakfast is the most popular occasion for yogurt drinks
- Snacking poses potential for yogurt drinks

The Consumer – Reasons to Eat Yogurt/Drink Yogurt Drinks

Key points

- Around two in five eat yogurt/fromage frais as an alternative to other treats
Figure 43: Reasons for eating yogurt/fromage frais and/or drinking yogurt drinks, April 2014
- Around a fifth eat yogurt for protein and calcium
- More than two in five drink yogurt drinks for digestive health

The Consumer – Attitudes Towards Yogurt and Yogurt Drinks

Key points

- Three in four believe in the nutritious benefits of yogurt/yogurt drinks
Figure 44: Attitudes towards yogurt, fromage frais and yogurt drinks, April 2014
- Sugar content is under attention
- Older consumers are less likely to switch based on promotions
Figure 45: Agreement with the statement 'If buying yogurt, I would switch to a brand that is on promotion', by age, April 2014
- Younger adults are most interested in the on-the-go formats and new flavours
Figure 46: Agreement with statements on yogurt/yogurt drinks, by age, April 2014
- Opportunities to promote support of farmers/producers to gain favour

Appendix – Market Drivers

- Figure 47: GDP, PDI, consumer expenditure and savings, at current prices, 2009-19
- Figure 48: GfK NOP consumer confidence index, monthly, January 2008-May 2014

Appendix – Who's Innovating?

- Figure 49: Share of new product launches in the UK yogurt market, branded vs. own-label, 2010-14

Appendix – Market Size and Forecast

- Figure 50: Best- and worst-case forecasts for retail sales of yogurt and yogurt drinks, by value, 2014-19
- Figure 51: Best- and worst-case forecasts for retail sales of yogurt and yogurt drinks, by volume, 2014-19

Appendix – Market Share

- Figure 52: UK retail sales of leading manufacturers in drinking yogurt, by value and volume, 2012/13 and 2013/14

Appendix – Brand Research

- Figure 53: Brand usage, March 2014
- Figure 54: Brand commitment, March 2014
- Figure 55: Brand momentum, March 2014
- Figure 56: Brand diversity, March 2014
- Figure 57: Brand satisfaction, March 2014
- Figure 58: Brand recommendation, March 2014
- Figure 59: Brand attitude, March 2014

BUY THIS
REPORT NOW

VISIT: store.mintel.com
 CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094
 Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100
 EMAIL: oxygen@mintel.com

Yogurt and Yogurt Drinks - UK - July 2014

Report Price: £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 60: Brand image – Macro image, March 2014

Figure 61: Brand image – Micro image, March 2014

Appendix – Brand Communication and Promotion

Figure 62: Advertising expenditure in the UK yogurt and yogurt drinks market, by top 10 advertisers (sorted by 2013), 2010-14

Appendix – The Consumer – Qualities Associated with Yogurt and Yogurt Drinks

Figure 63: Qualities associated with yogurts, ice cream and desserts, April 2014

Figure 64: Most popular qualities associated with ice cream, by demographics, April 2014

Figure 65: Next most popular qualities associated with ice cream, by demographics, April 2014

Figure 66: Other qualities associated with ice cream, by demographics, April 2014

Figure 67: Most popular qualities associated with chilled desserts, by demographics, April 2014

Figure 68: Next most popular qualities associated with chilled desserts, by demographics, April 2014

Figure 69: Other qualities associated with chilled desserts, by demographics, April 2014

Figure 70: Most popular qualities associated with desserts stored at room temperature, by demographics, April 2014

Figure 71: Next most popular qualities associated with desserts stored at room temperature, by demographics, April 2014

Figure 72: Other qualities associated with desserts stored at room temperature, by demographics, April 2014

Figure 73: Most popular qualities associated with frozen desserts, by demographics, April 2014

Figure 74: Next most popular qualities associated with frozen desserts, by demographics, April 2014

Figure 75: Other qualities associated with frozen desserts, by demographics, April 2014

Figure 76: Most popular qualities associated with yogurt/fromage frais, by demographics, April 2014

Figure 77: Next most popular qualities associated with yogurt/fromage frais, by demographics, April 2014

Figure 78: Other qualities associated with yogurt/fromage frais, by demographics, April 2014

Figure 79: Most popular qualities associated with yogurt drinks, by demographics, April 2014

Figure 80: Next most popular qualities associated with yogurt drinks, by demographics, April 2014

Figure 81: Other qualities associated with yogurt drinks, by demographics, April 2014

Appendix – The Consumer – Usage

Figure 82: Frequency of eating/drinking yogurt, fromage frais and/or yogurt drinks, April 2014

Figure 83: Frequency of eating/drinking yogurt, by demographics, April 2014

Figure 84: Frequency of eating/drinking fromage frais, by demographics, April 2014

Figure 85: Frequency of eating/drinking yogurt drinks, by demographics, April 2014

Appendix – The Consumer – Purchasing Habits

Figure 86: Types of yogurt/yogurt drink bought in the past three months, April 2014

Figure 87: Most popular types of yogurt/yogurt drink bought in the past three months, by demographics, April 2014

Figure 88: Next most popular types of yogurt/yogurt drink bought in the past three months, by demographics, April 2014

Figure 89: Repertoire of types of yogurt/yogurt drink bought in the past three months, April 2014

Figure 90: Repertoire of types of yogurt/yogurt drink bought in the past three months, by demographics, April 2014

Figure 91: Varieties of yogurt/yogurt drink bought in the past three months, April 2014

Figure 92: Most popular varieties of yogurt/yogurt drink bought in the past three months, by demographics, April 2014

Figure 93: Next most popular varieties of yogurt/yogurt drink bought in the past three months, by demographics, April 2014

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com
CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094
Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100
EMAIL: oxygen@mintel.com

Yogurt and Yogurt Drinks - UK - July 2014

Report Price: £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Appendix – The Consumer – Occasions

Figure 94: Occasions when people eat yogurt/fromage frais and/or drink yogurt drinks, April 2014

Figure 95: Occasions when people eat yogurt, by demographics, April 2014

Figure 96: Occasions when people eat fromage frais (eg Petits Filous), by demographics, April 2014

Figure 97: Occasions when people eat yogurt drink (eg Actimel, Benecol), by demographics, April 2014

Appendix – The Consumer – Reasons to Eat Yogurt/Drink Yogurt Drinks

Figure 98: Reasons for eating yogurt/fromage frais and/or drinking yogurt drinks, April 2014

Figure 99: Reasons for eating yogurt, by demographics, April 2014

Figure 100: Reasons for eating fromage frais, by demographics, April 2014

Figure 101: Reasons for drinking yogurt drinks, by demographics, April 2014

Appendix – The Consumer – Attitudes Towards Yogurt and Yogurt Drinks

Figure 102: Attitudes towards yogurt, fromage frais and yogurt drinks, April 2014

Figure 103: Agreement with the statement 'Eating yogurt/yogurt drinks is a good way to get nutrients in to your diet', by demographics, April 2014

Figure 104: Agreement with the statement 'More money from yogurt sales should go directly to the farmer/producer', by demographics, April 2014

Figure 105: Agreement with the statement 'If buying yogurt, I would switch to a brand that is on promotion', by demographics, April 2014

Figure 106: Agreement with the statement 'Drinking yogurts are not filling enough as a snack', by demographics, April 2014

Figure 107: Agreement with the statement 'I worry about the sugar content in yogurts/yogurt drinks', by demographics, April 2014

Figure 108: Agreement with the statement 'I would be interested in buying yogurts that are easier to eat out of home/on the go', by demographics, April 2014

Figure 109: Agreement with the statement 'Yogurts inspired by ingredients from different countries', by demographics, April 2014

Figure 110: Agreement with the statement 'Yogurt made with local/regional ingredients', by demographics, April 2014

Figure 111: Agreement with the statement 'I would be interested in trying thicker drinking yogurts', by demographics, April 2014

Figure 112: Agreement with the statement 'I would rather eat less yogurt than switch to a lighter version', by demographics, April 2014

Figure 113: Agreement with the statement 'I would pay more for yogurts with added calcium compared to standard yogurt', by demographics, April 2014

Figure 114: Agreement with the statement 'I would be interested in trying savoury flavours in yogurt', by demographics, April 2014

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: oxygen@mintel.com