

# Market Trends in Yogurt Products

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Dairy Australia/NCDEA Webinar





# Dairy Innovation Australia (DIAL)

## Technical Support for small-to-large dairy/food companies

- Product Development Support
- Pilot scale processing – UHT, membrane filtration, infant formula, nutritional beverages, etc
- Sensory analysis – consumer and trained panels
- Process Engineering solution
- Starter culture for cheese and fermented products
- Market intelligence
- Technical feasibility studies
- Microbiology and biotechnology support
- Well-qualified & experienced staff and expert knowledge

Contact: [enquiries@dairyinnovation.com.au](mailto:enquiries@dairyinnovation.com.au)

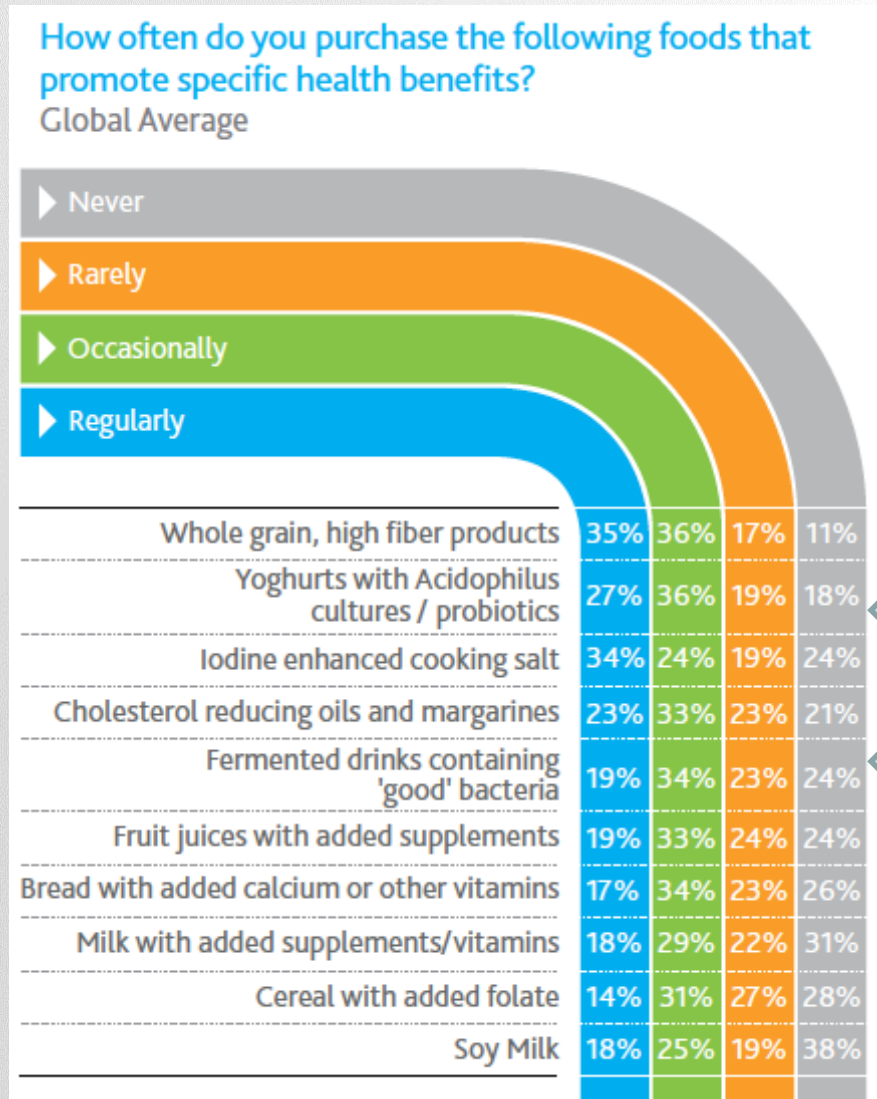




# Contents

- Yogurt – consumer perception
- Yogurt market forecast for 5 years (2013-2018)
- Greek yogurt in US
- Data on new product launches in last 2 years
- New product trends
- Summary

# Yogurt – a global healthy food



56 countries, 25,000 participants

Nielsen, 2012



# Yogurt in Top 5 health purchases – in all Regions

Top 5 Health-Benefit Foods Purchased Regularly/Occasionally

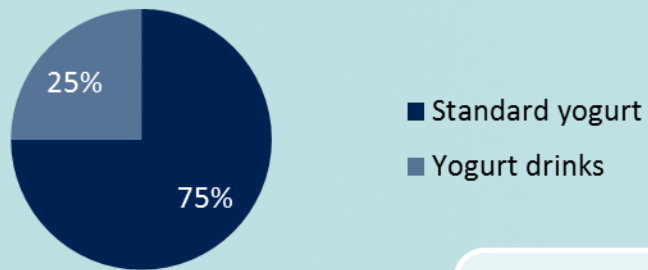
	Asia Pacific	Europe	Latin America	Middle East/Africa	North America
1.	Yoghurts with Acidophilus ★	Whole Grain/High Fiber Products	Whole Grain/High Fiber Products	Fruit Juices with Supplements	Whole Grain/High Fiber Products
2.	Fermented Drinks ★	Iodine Enhanced Cooking Salt	Cholesterol Reducing Oils/Margarines	Cholesterol Reducing Oils/Margarines	Cholesterol Reducing Oils/Margarines
3.	Whole Grain/High Fiber Products	Yoghurts with Acidophilus ★	Yoghurts with Acidophilus ★	Whole Grain/High Fiber Products	Bread with Added Calcium/Vitamins
4.	Soy Milk	Cholesterol Reducing Oils/Margarines	Cereal with Folate	Iodine Enhanced Cooking Salt	Fruit Juices with Supplements
5.	Bread with Added Calcium/Vitamins	Fermented Drinks ★	Fruit Juices with Supplements	Yoghurts with Acidophilus ★	Yoghurts with Acidophilus ★

56 countries, 25,000 participants

Nielsen, 2012

# Global Yogurt market and consumption

Global: market value by category, 2012



Global: fastest growing categories by value, CAGR 2012–17











Yogurt drinks	+4.3%
Standard yogurt	+3.8%

**Global market 2012 -  
US\$53.2bn**

Top 10 markets: by value (\$bn), 2012

China		8.5	Netherlands		2.7
US		6.6	Italy		2.3
Japan		3.7	UK		2.2
Germany		3.1	Brazil		1.6
France		3.1	Spain		1.4

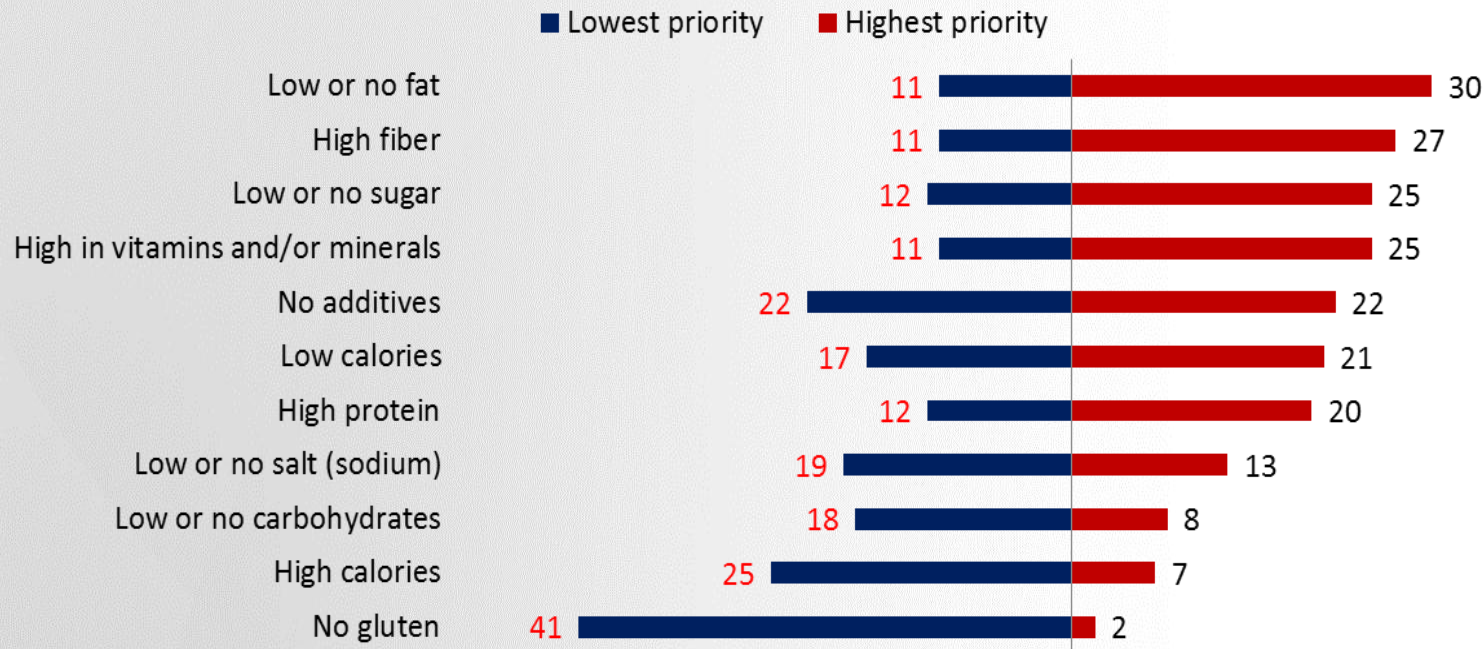
Top 10 markets: by per capita expenditure (\$), 2012

Netherlands		158.9	Sweden		64.9
Switzerland		107.1	Portugal		60.4
Norway		92.7	<b>Australia</b>		56.5
Finland		76.7	Austria		53.4
Ireland		73.9	Denmark		51.1



# Consumer research - Dairy

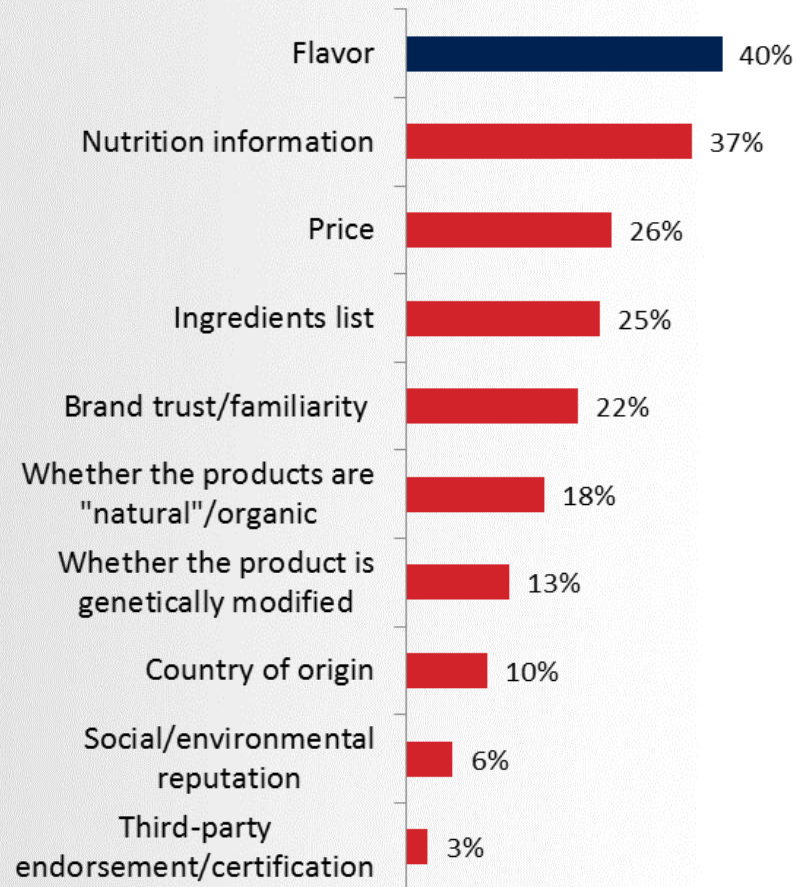
## Priorities when buying dairy products



Dairy products like yogurt should focus on low or no fat, high fibre, low/no sugar, high vit/min and no additives

# Consumer research – Food & Drinks

When choosing a food or drink what is your priority?





# Top 20 flavours for new yogurt products – 2011-12

## Top 20 yogurt flavours – 2011-12

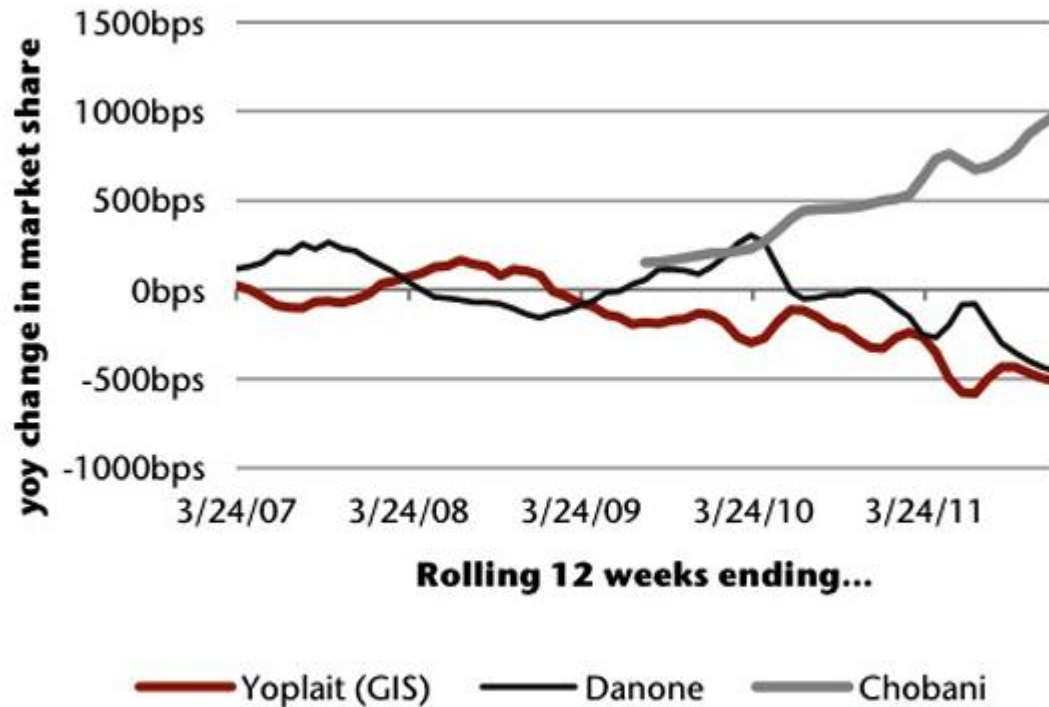
1. Strawberry	11. Apricot
2. Peach	12. Chocolate
3. Vanilla	13. Orange
4. Blueberry	14. Lemon
5. Raspberry	15. Pear
6. Banana	16. Honey
7. Mango	17. Passion fruit
8. Apple	18. Coconut
9. Cherry	19. Cereal
10. Pineapple	20. Blackberry

# Surge in Greek Yogurt in US



# Yogurt market share - US

**Chart 6: Yogurt market share ...**



Greek (Chobani)

Share of Greek Yogurt  
2007 – 1%  
2012 – 48%  
2013 – Going down

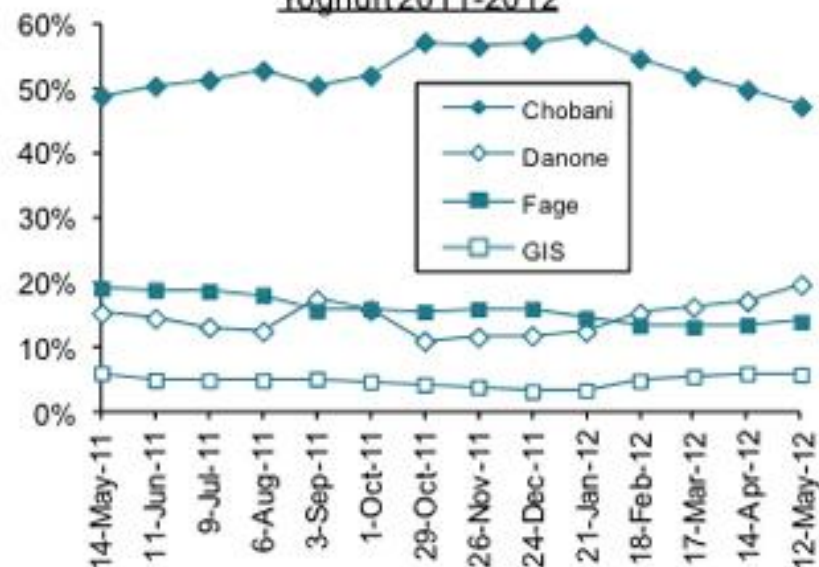
Source: The Nielsen Company, Jefferies

# Greek yogurt 2013 - US

US Greek Yoghurt: Market Shares 2007-2012

	May					
	2007	2008	2009	2010	2011	2012
Chobani	0.0%	8.4%	31.0%	44.4%	48.9%	47.3%
Danone	0.0%	8.8%	15.5%	15.6%	15.2%	19.7%
Fage	93.5%	74.1%	44.8%	25.2%	19.1%	13.9%
GIS	0.0%	0.0%	0.0%	8.1%	6.0%	5.7%
Private Label	1.9%	1.1%	0.4%	0.0%	1.6%	5.4%
Other	4.6%	7.7%	8.3%	6.7%	9.2%	8.1%
Total	100%	100%	100%	100%	100%	100%

US Yoghurt: Market Share of Greek Yoghurt 2011-2012





# Greek yogurt - US

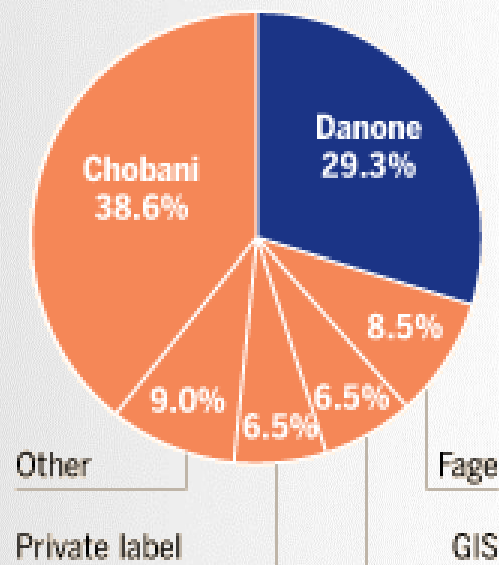
## Danone

US yoghurt market share (%)



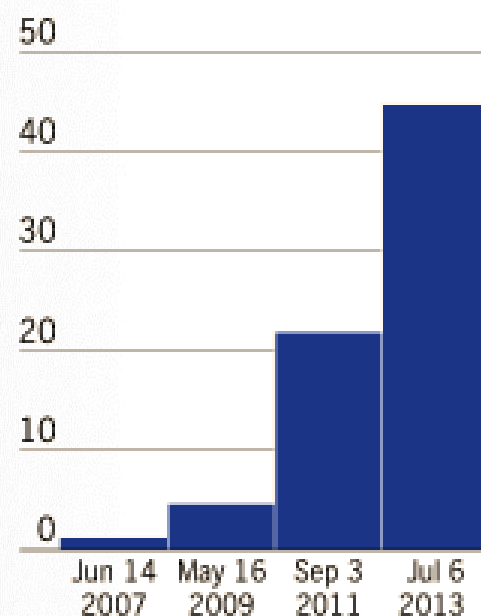
Source: Bernstein

Estimated US greek yoghurt market share, 2013 (%)



## Greek yoghurt in the US

% of total US yoghurt market



# US –frozen yogurt growth

2011 - 2013		GROWTH
Frozen Yogurt Industry	\$279 million - \$485 million	74%
Ice Cream Industry	\$5.7 billion - \$5.9 billion	3.9%

Source: Mintel, FoodProductDesign.com



# Consumer research - US

## CONSUMER BEHAVIOR TOWARD YOGURT/YOGURT DRINKS

"Thinking about yogurt and yogurt drinks,  
please tell us which of the following apply to you." %

I buy yogurt for myself and/or my family because it is a good source of calcium and vitamin D.	60
I and/or someone else in my household consume(s) yogurt/yogurt drinks for digestive health reasons.	24
Yogurt drinks are more expensive than yogurt.	21
I use single-serve yogurt or yogurt drinks in my kids' school lunch pack.	14
I or someone else in my household make(s) yogurt drinks from store-bought yogurt at home.	12
I buy frozen yogurt dessert from stores such as Red Mango and Pinkberry at least once a month.	9
I or someone else in my household, instead of buying frozen yogurt, freeze(s) non-frozen yogurt.	7
I or someone else in my household make(s) yogurt at home.	6
I or someone else in my household make(s) gourmet dessert from frozen yogurt bought from the store.	6
None of the above	15

Consumer Behavior Toward Yogurt/Yogurt Drinks, February-March 2012 Base: 1,306 internet users aged 18+ who purchased yogurt/yogurt drinks for self/household in the past month Source: Mintel

# Greek yogurt - US

REASONS FOR BUYING GREEK YOGURT	
"Why do you buy Greek-style yogurt for yourself/household?"	%
For the taste	58
It is healthier than regular yogurt	45
It is high in protein	44
For the texture	39
I believe that it has more cultures than regular yogurt	26
To lose weight or as a weight-loss food	19
I use it in place of sour cream	15
It makes better dips compared with regular yogurt	11
None of the above	6

Reasons for Buying Greek Yogurt, February-March 2012

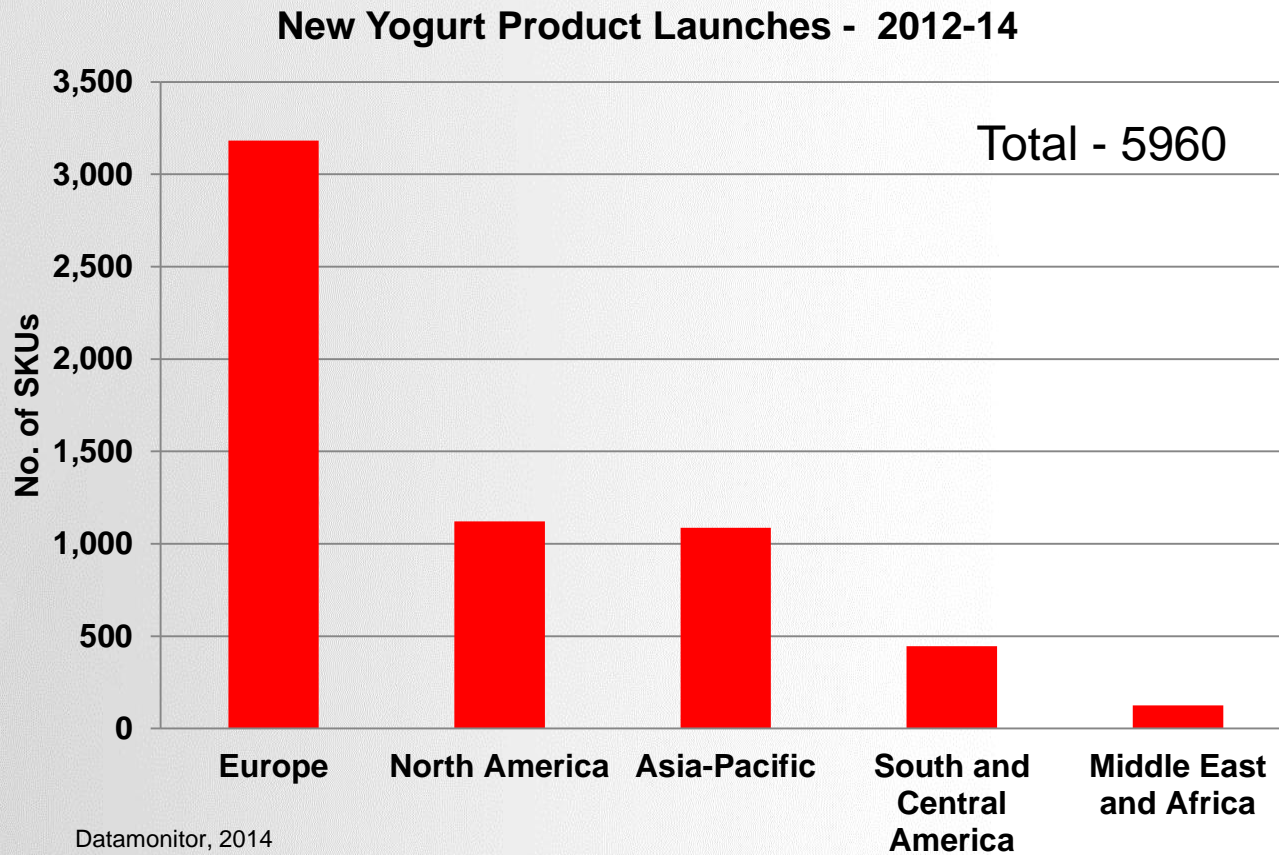
Source: Mintel

Base: 619 internet users aged 18+ who purchased Greek yogurt/yogurt drinks for self/household in the past month.



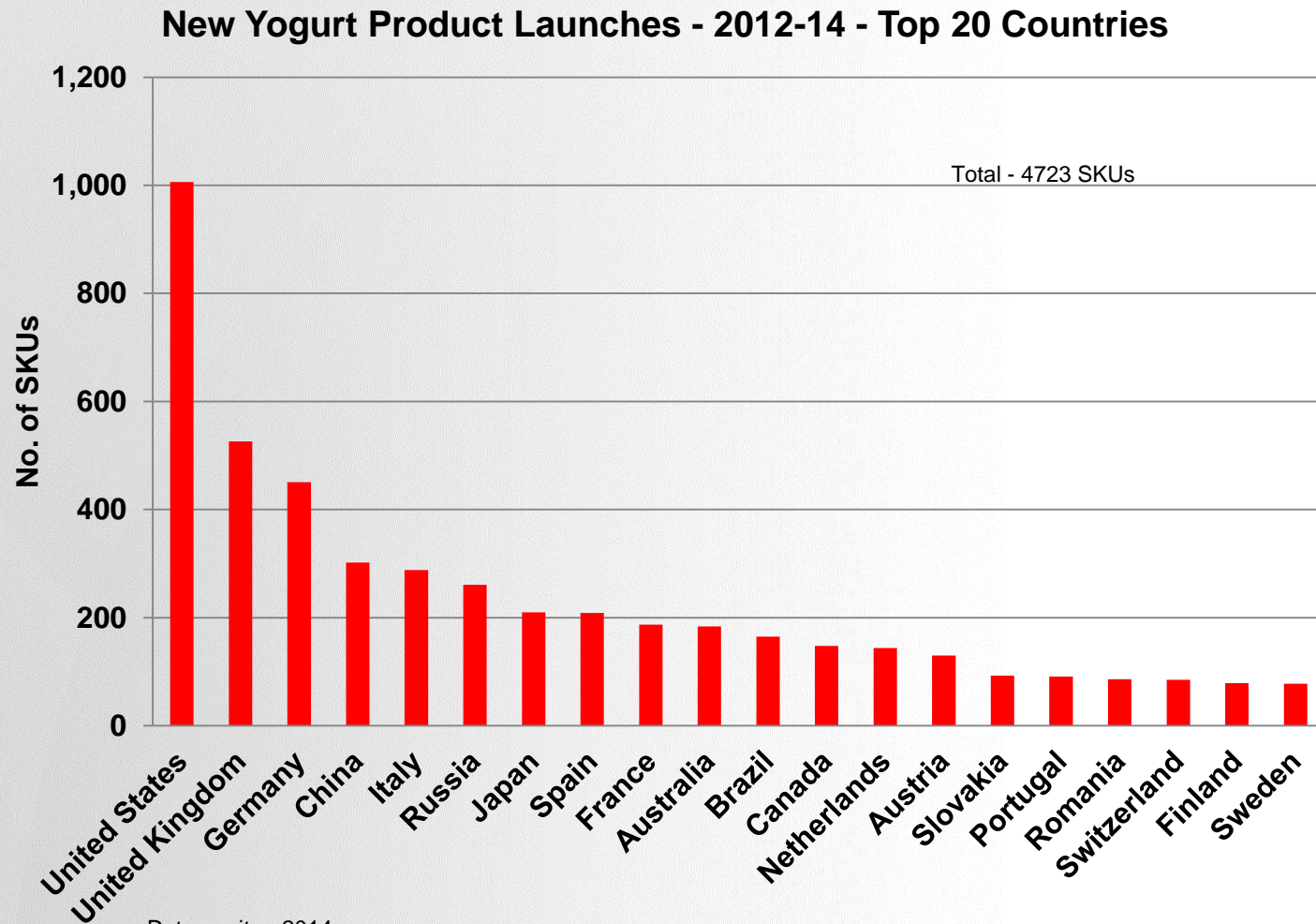
# Product launch statistics – Last 2 years (2012-14)

# New Yogurt Product Launches - 2012-14



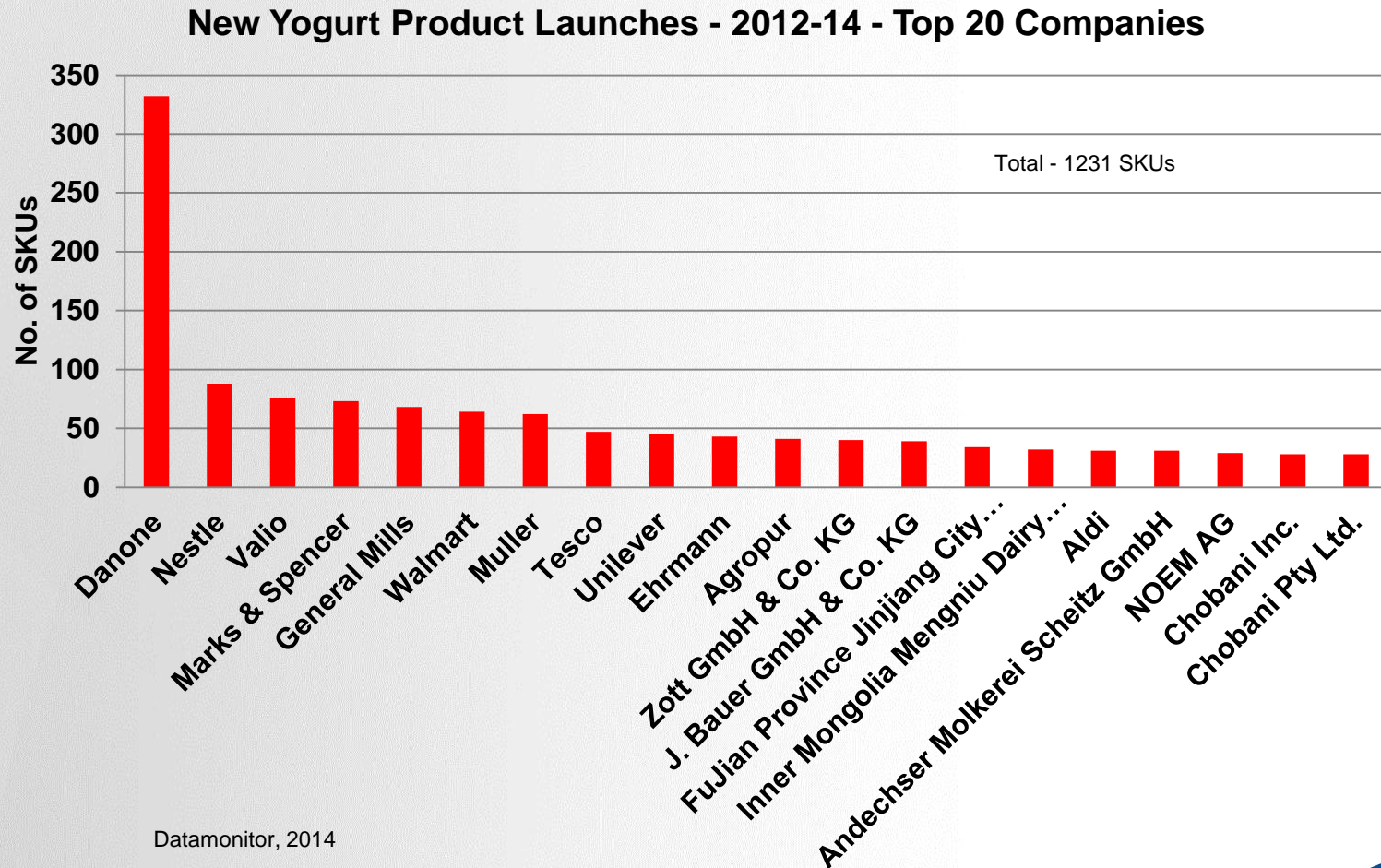


# New Yogurt Product Launches - 2012-14 - Top 20 Countries



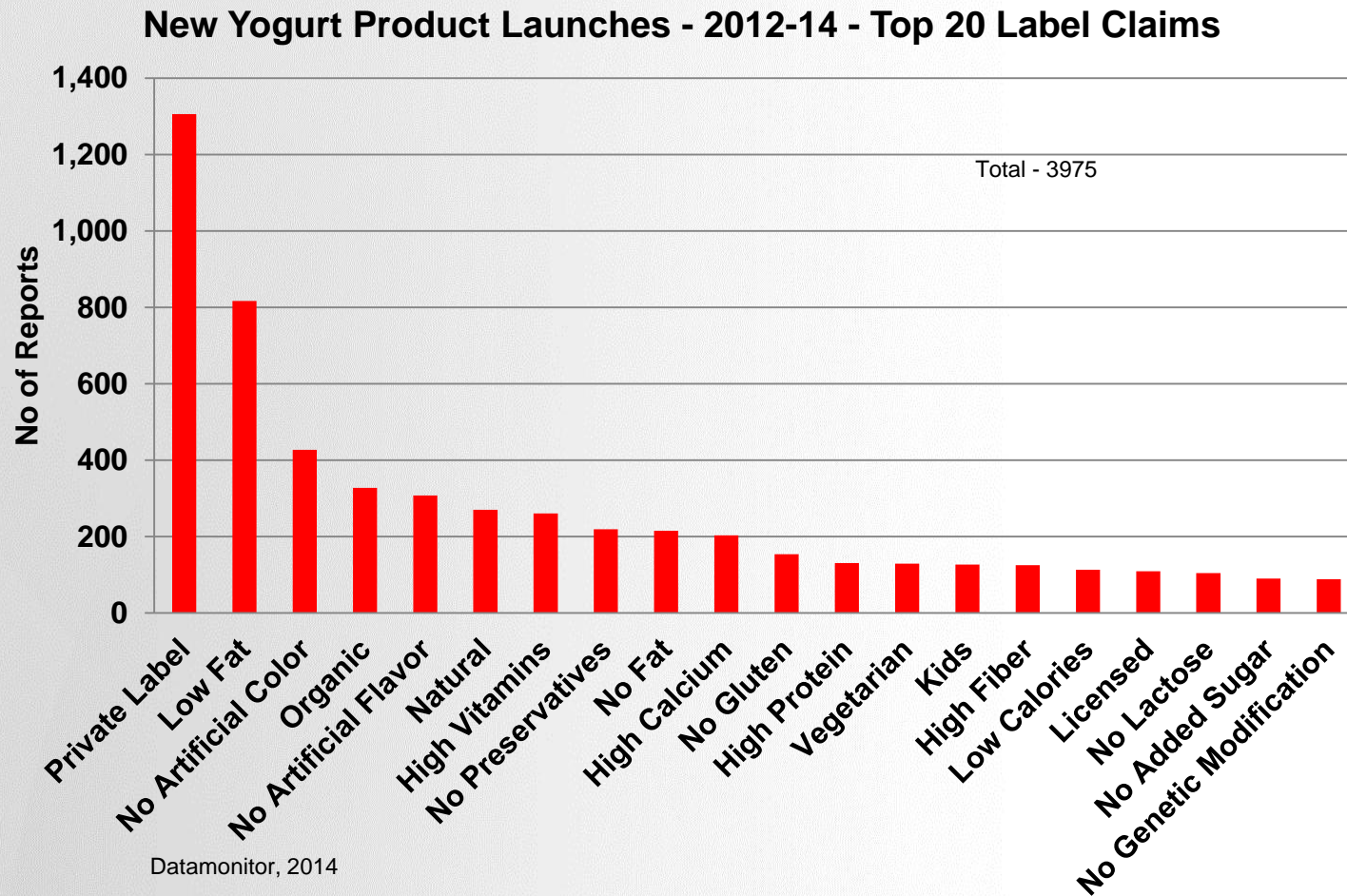
Datamonitor, 2014

# New Yogurt Product Launches - 2012-14 - Top 20 Companies



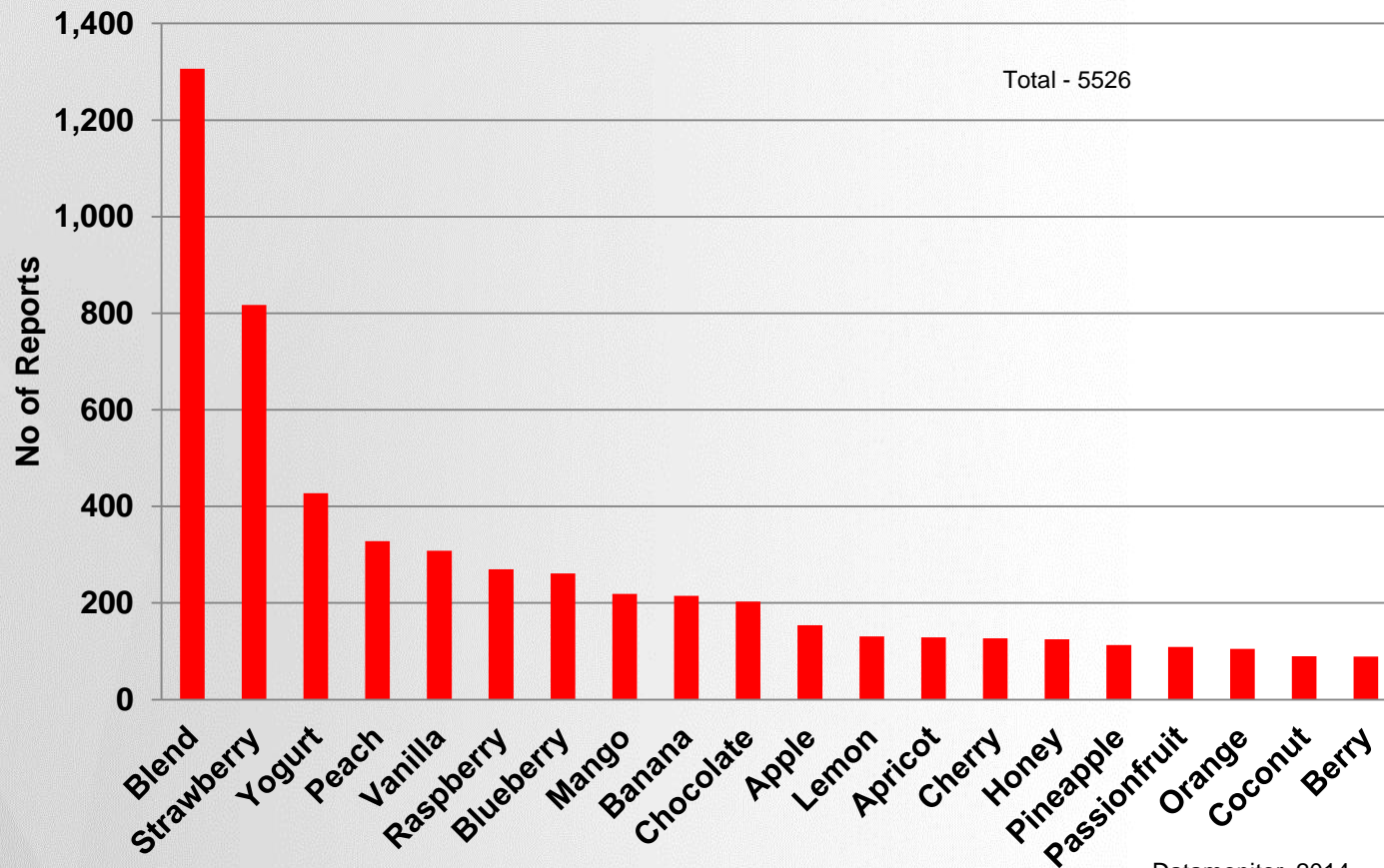


# New Yogurt Product Launches - 2012-14 - Top 20 Label Claims



# New Yogurt Product Launches - 2012-14 - Top 20 Flavour Claims

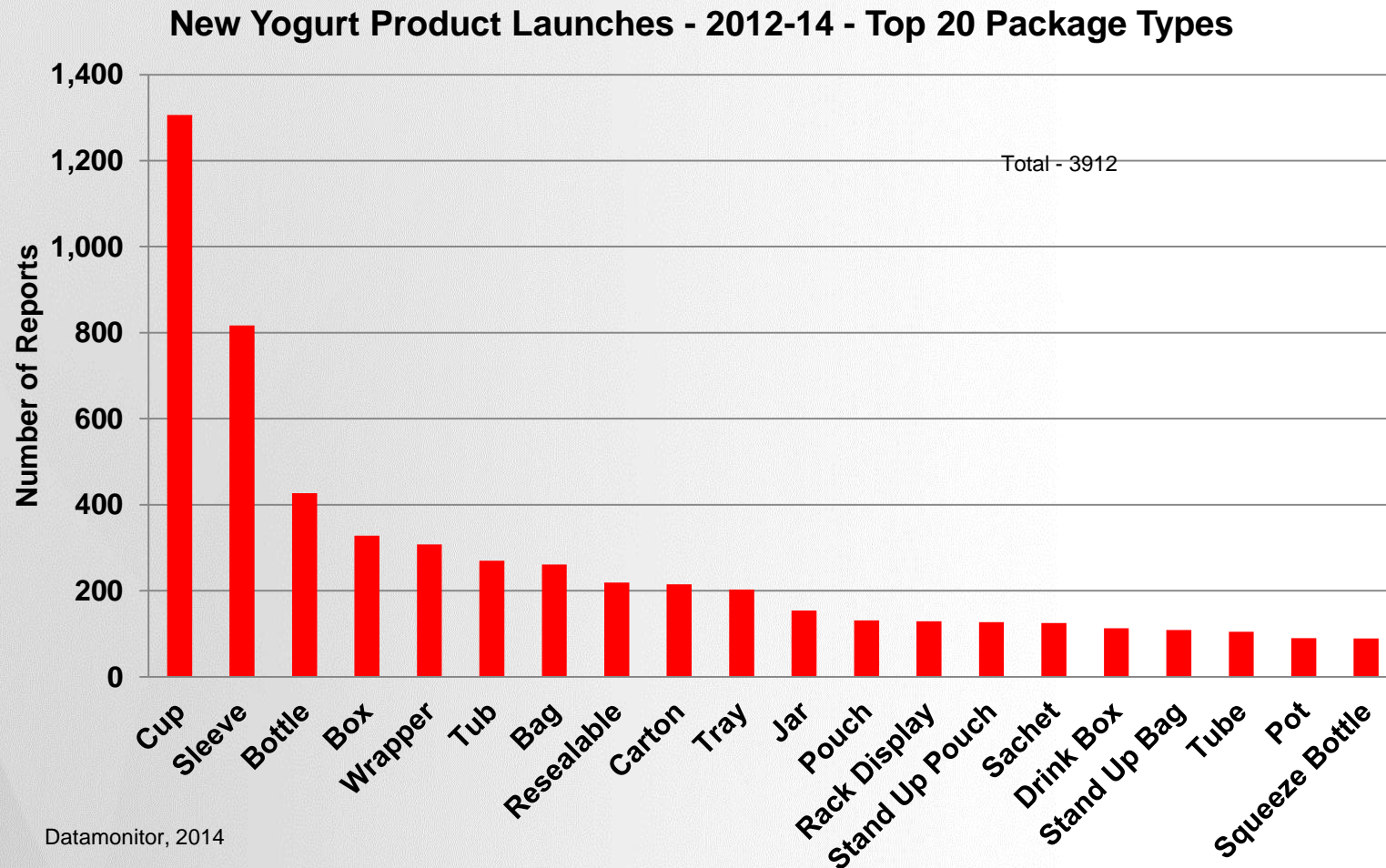
New Yogurt Product Launches - 2012-14 - Top 20 Flavour Claims



Datamonitor, 2014

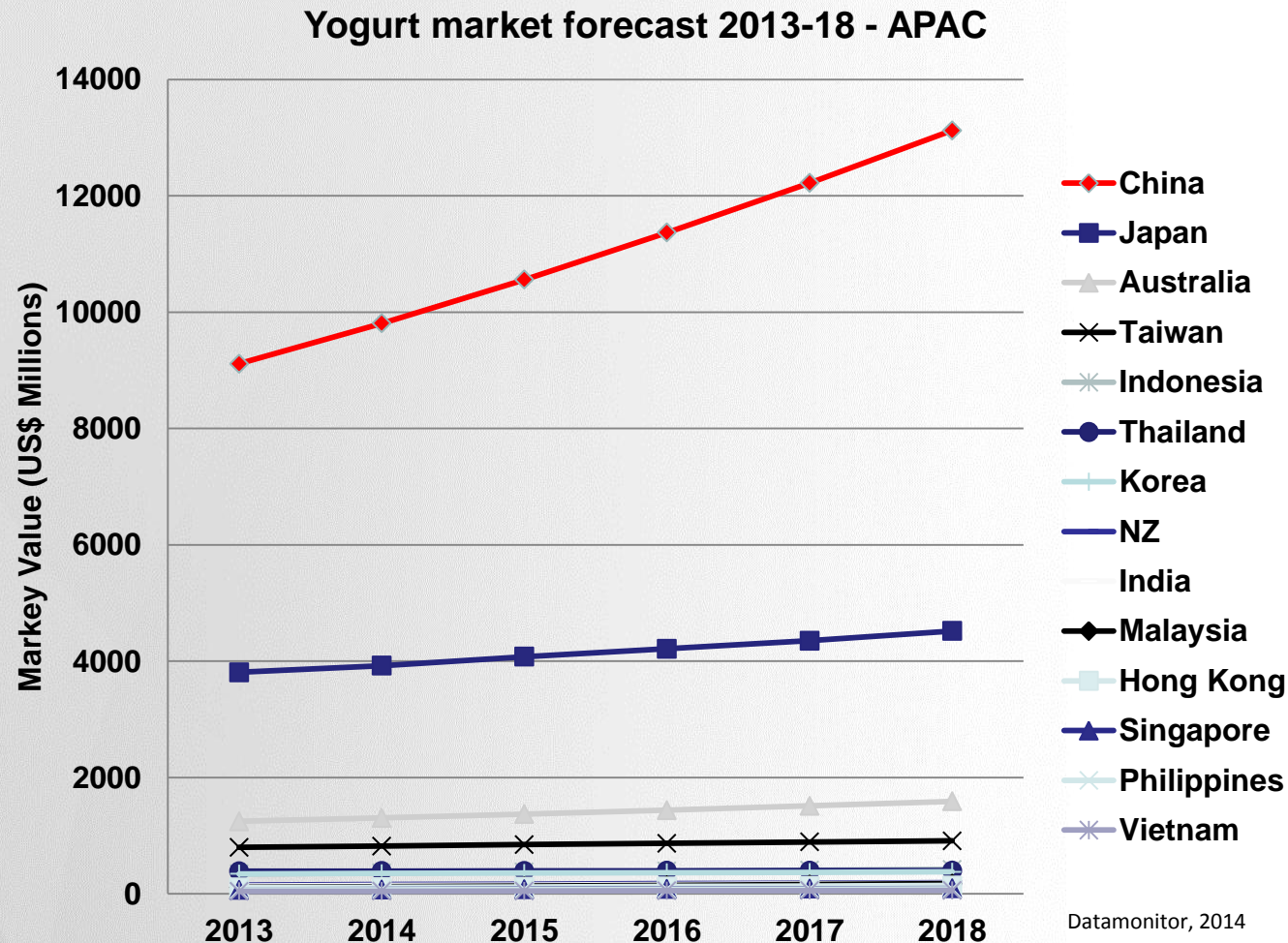


# New Yogurt Product Launches - 2012-14 - Top 20 Package Types



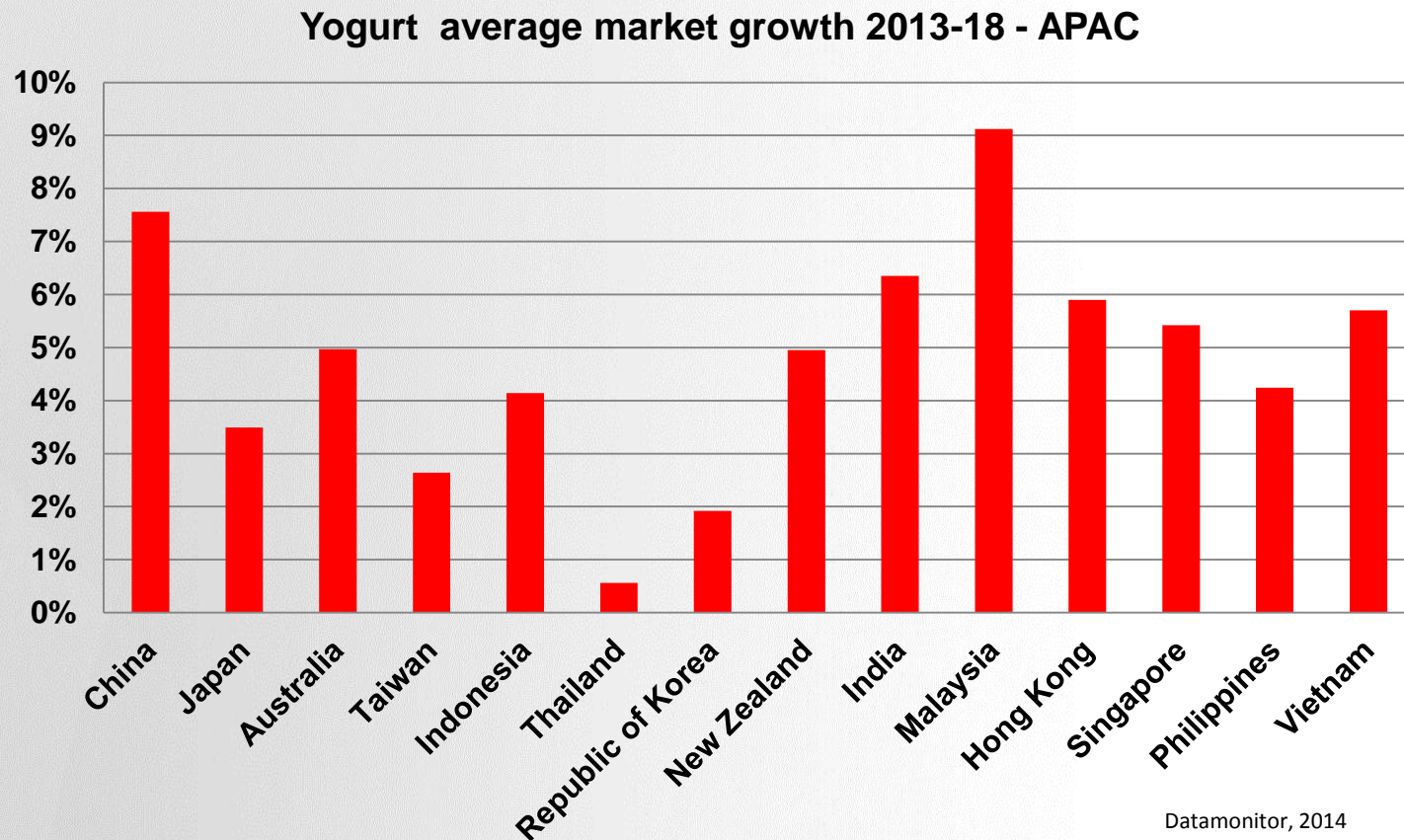
Datamonitor, 2014

# Yogurt market forecast 2013-18 - APAC



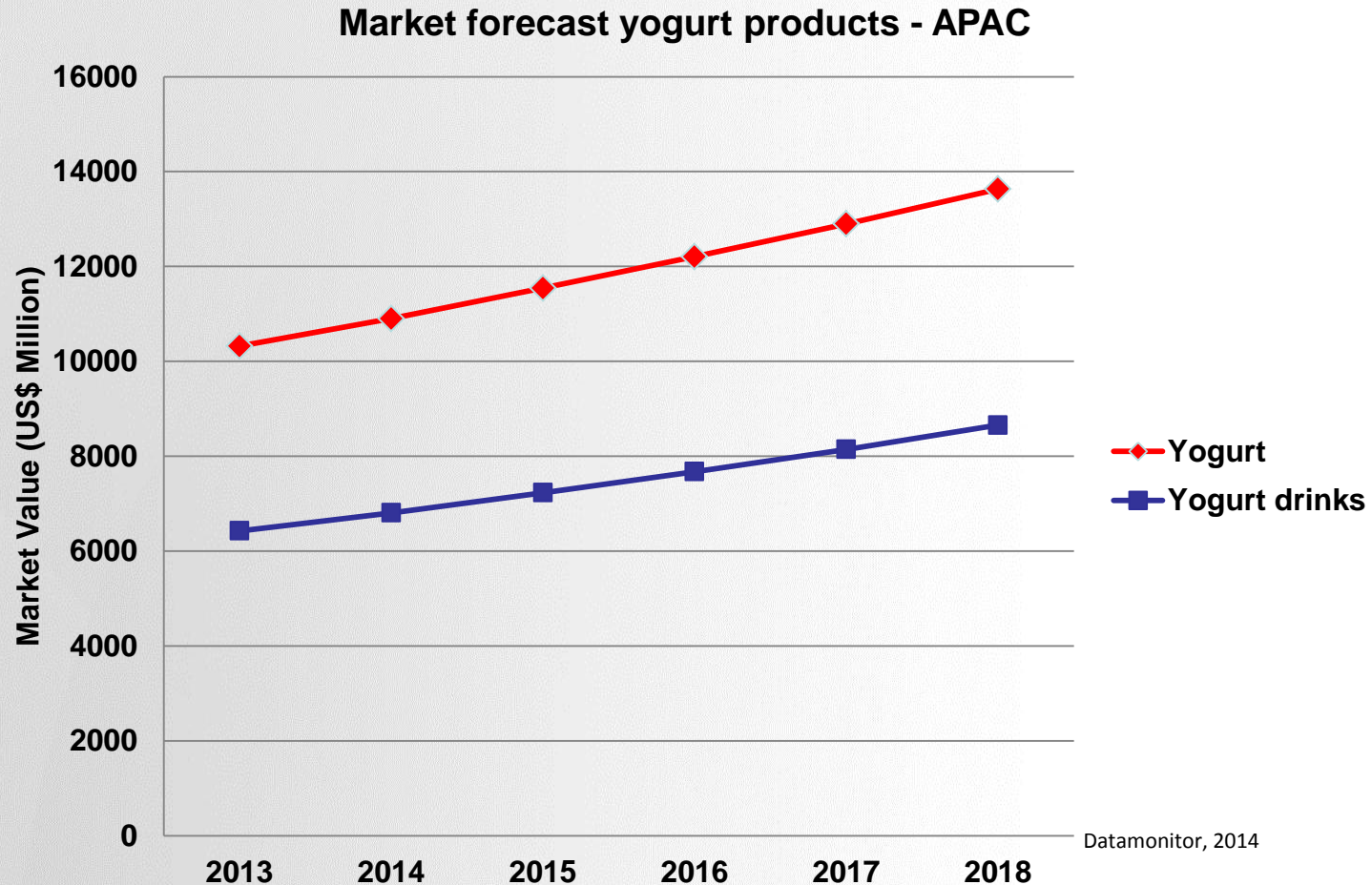


# Yogurt average market growth 2013-18 - APAC



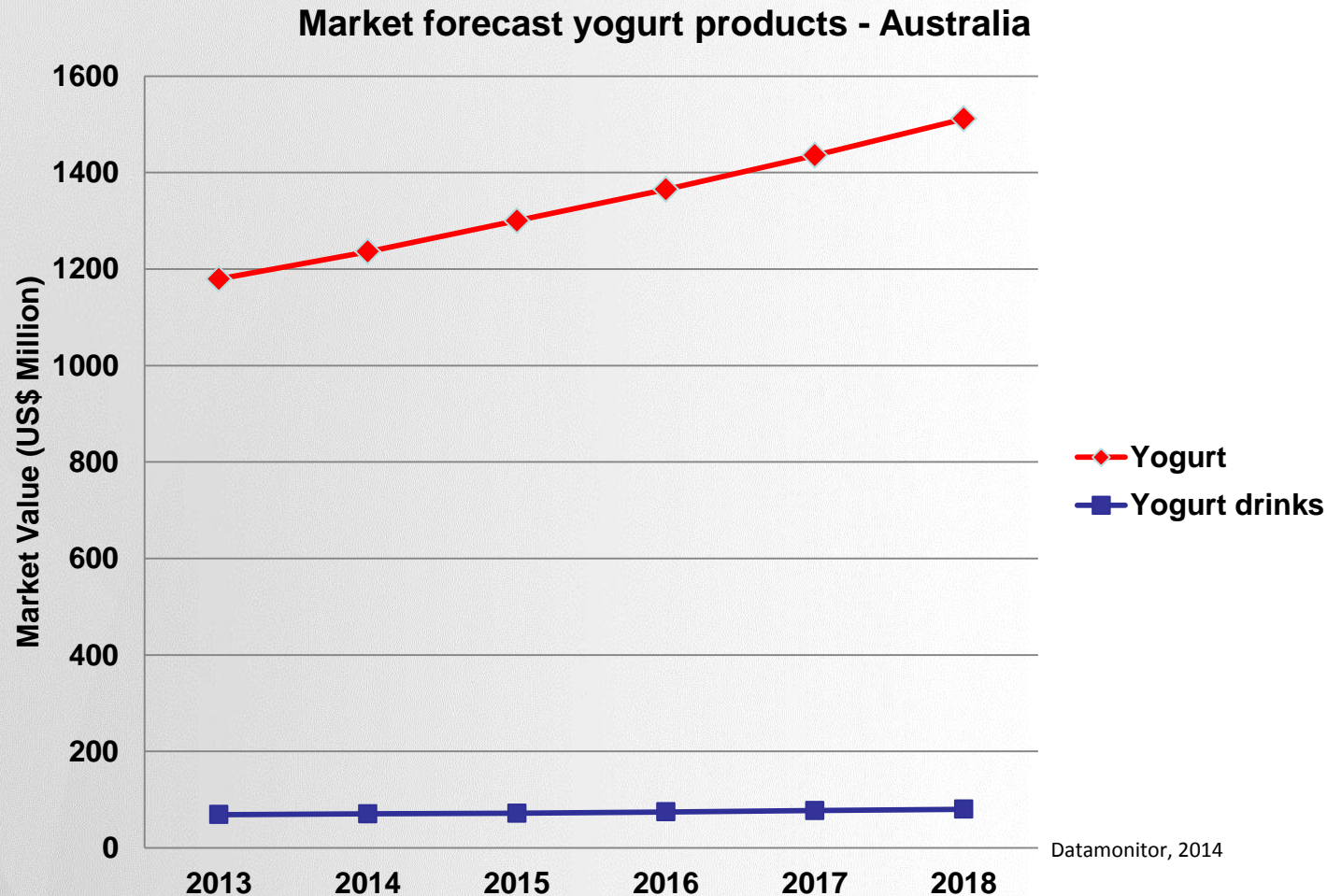
Datamonitor, 2014

# Market forecast yogurt products - APAC





# Market forecast yogurt products - Australia



# Yogurt Product Trends



# Greek yogurt - US





# Greek-style yogurt - Kids





# Greek-style yogurt - Frozen





# Greek-style yogurt - Australia



Danone-MG, Australia



Lion Dairy, Australia



Roaming Cow  
Australia



Lion Dairy, Austral



Chobani, AU



Chobani, AU



The collage features six food products. In the top left is a container of Chobani Flip Blueberry Power Greek yogurt, labeled 'ONLY NATURAL INGREDIENTS' and 'BLUEBERRY NON-FAT YOGURT'. To its right is a container of Müller Greek Corner lowfat yogurt with caramelized almonds. In the top right is a container of Chobani Flix Key Lime Crumble yogurt. In the bottom left is a container of Ski Double Up Apple Crumble yogurt. In the bottom center is a container of Müller Strawberry Greek Style Corner yogurt. In the bottom right is a box of Tesco Crunch Duo mix Muesli.





# Frozen yogurt



Japan



UK



Bulla, Australia



Weis, Australia



Bulla, Australia



Bulla, Australia



# Yogurt with Aloe Vera



Vietnam



China



China



Japan – with aloe pulp



Japan – with aloe chunks

# Yogurt that you can eat or drink



Danone  
The Netherlands, 2014



# Yogurt from milk from grass-fed cows



HAPPY MOO  
HAPPY YOU





# Yogurt with Savoury flavours



Blue Hill, New York, US



Greek Gods (The Hain Celestial)  
- Salted Caramel



Pakistan – Nestle Raita



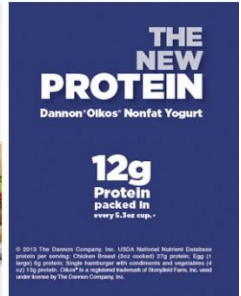
Coles, Australia



Japan – Morinaga  
with Azuki beans



# High protein yogurt



Dannon Oikos



Other high protein yogurts:  
Greek yogurt  
Icelandic yogurt



# Yogurt targeting men – high protein

PLAIN

## Nutrition Facts

Serv. Size 1 Container (227g)

### Amount Per Serving

Calories 140 Calories from Fat 0

% DV\*

Total Fat 0g 0%

Sat. Fat 0g 0%

Trans Fat 0g

Cholest. 0mg 0%

Sodium 95mg 4%

Total Carb. 9g 3%

Dietary Fiber 0g 0%

Sugars 9g

Protein 25g 48%

Vitamin A 0% • Vitamin C 0%

Calcium 25% • Iron 0%

\*Percent Daily Values (DV) are based on a 2,000 calorie diet.

Plain yogurt is the perfect protein-packed option for those looking to either drop a few pounds or keep their food as uncomplicated as possible.

Contains 7 live active cultures:

- S. Thermophilus
- L. Bulgaricus
- L. Acidophilus
- Bifidus
- L. Casei
- L. Lactis
- L. Rhamnosus

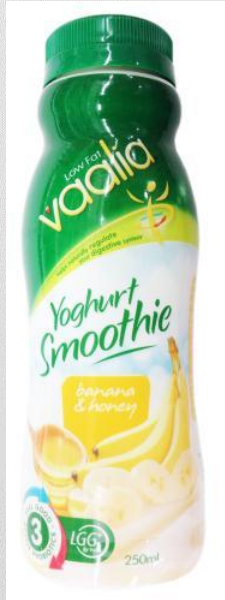
## For Men, By Men

The first yogurt in the U.S. designed for a man's health and nutrition needs





# Yogurt Smoothie



Parmalat, Australia – Low fat





# Breakfast yogurt – with cereals



Breakfast To Go, Bircher Muesli, Parmalat, Australia



Coles, AU



Breakfast To Go, Parmalat, AU





# 100 Calorie yogurt





# Yogurt for babies





# Yogurt for toddlers





# Yogurt for kids



With fruit juice, Yili, China





# Squeezable and sucking-type yogurt





# Squeezable and sucking-type yogurt - Australia



Chobani, Australia



Lion Dairy, Australia



Macro, Organic AU



Coles, Australia



Bulla, AU



Parmalat, AU



# Functional yogurts



Japan – Snow Brand with acerola & milk ceramide MC-5 – moisturising skin



US- with omega 3



Japan – with acai – Sport/busy people



Japan – Kirin, with plasma lactic Acid bacteria – cold and flu



UK – cholesterol reduction



UK – cholesterol reduction



Japan – Glico Dairy, Vietnam – collagen, blueberry With collagen



Brazil – with Collagen hydrolysate, 0% fat



# Pouring yogurt



Danone MG, AU





# Regional theme yogurts



- Ayran/Laban/Lassi – Turkish/Middle East/India – yogurt, water, salt

- Icelandic yogurt – Skyr (high protein)



- Asian yogurt



- New Zealand Style yogurt – grass-fed cow, cream on top



- Australian Style yogurt – Greek with honey & fruits



- Kefir – Caucasus – yeast/bacteria grains



# Icelandic yogurt



Nutrition Facts	
Serving Size 1 container (150g)	
Amount Per Serving	
<b>Calories</b> 80	Calories from Fat 0
% Daily Value*	
<b>Total Fat</b> 0g	0%
Saturated Fat 0g	0%
Trans Fat 0g	
<b>Cholesterol</b> 0mg	0%
<b>Sodium</b> 60mg	2%
<b>Total Carbohydrate</b> 5g	2%
Dietary Fiber 0g	0%
Sugars 4g	
<b>Protein</b> 15g	
Vitamin A 0%	• Vitamin C 0%
Calcium 17%	• Iron 0%
*Percent Daily Values are based on a 2,000 calorie diet.	



High protein – thicker than Greek Yogurt



# Kefir



Australia



Japan



# Yogurt – other label claims

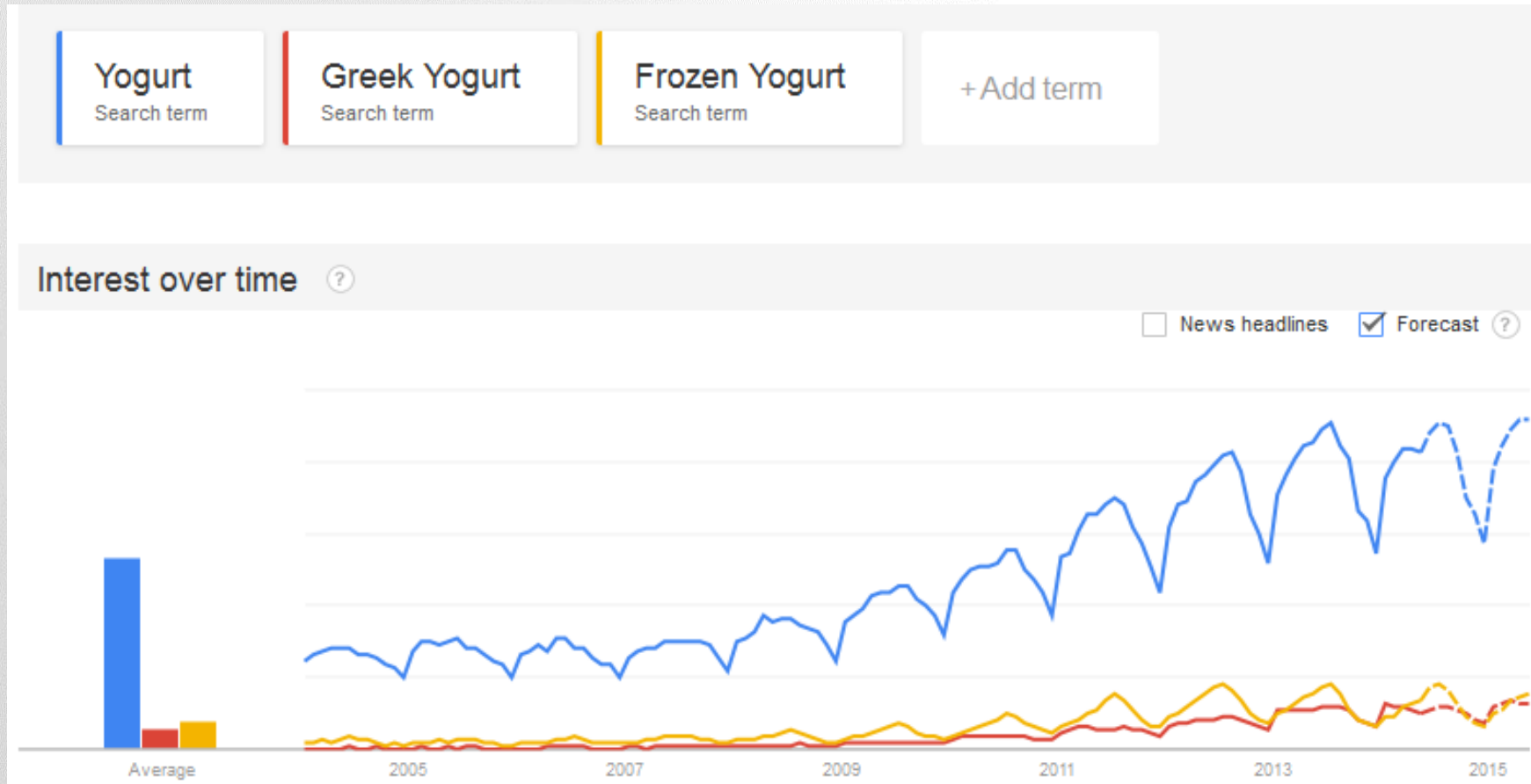
- No sugar
- Free-from
- All natural



# Summary

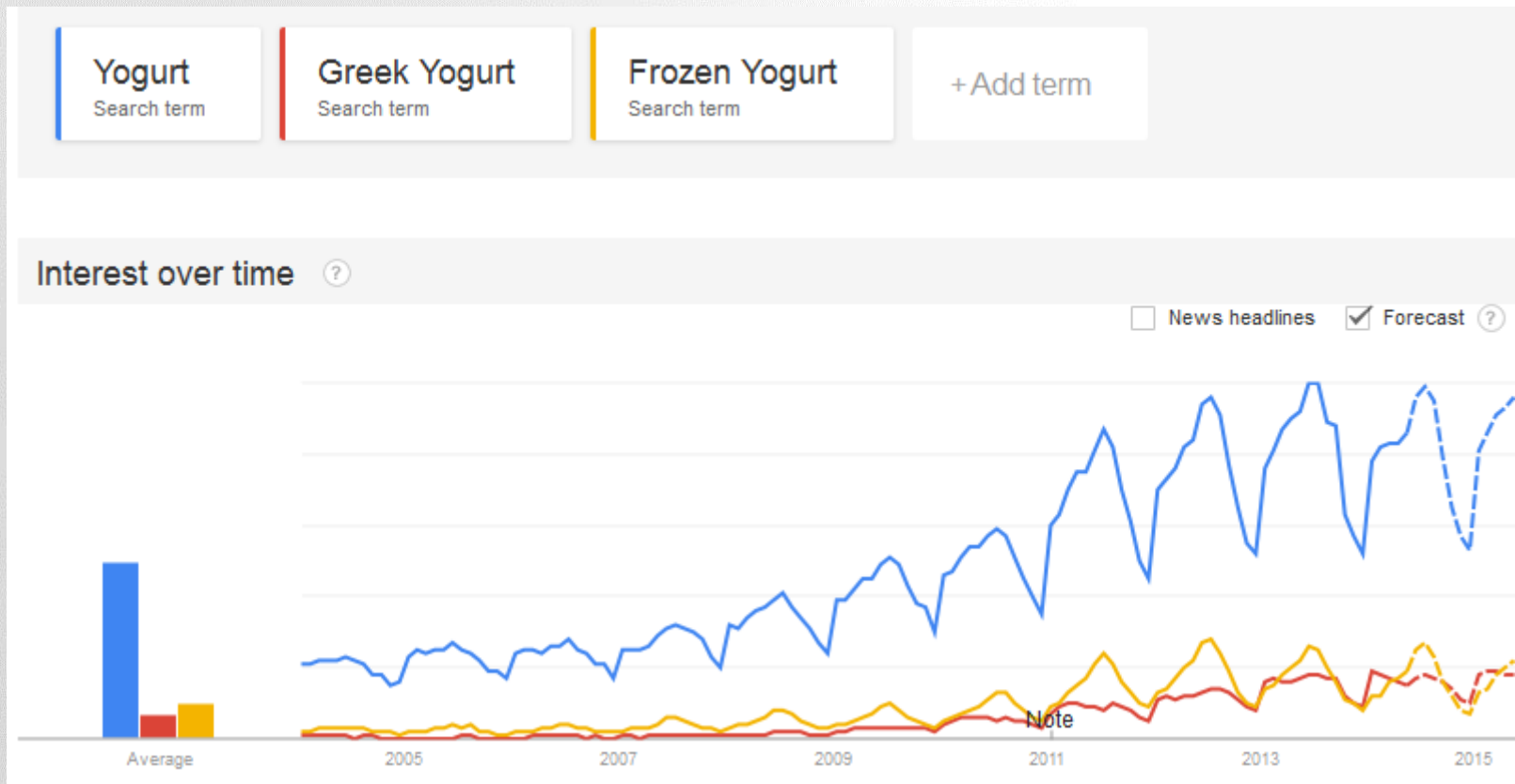
- Yogurt and fermented dairy drinks globally considered healthy
- Greek yogurt brand booming in US – available for adults, babies, toddlers and kids
- Surge in demand in China
- High protein a great selling point
- Savoury yogurts possibilities
- Regional theme yogurts have a point of difference

# Trending Yogurt on Google - Global





# Trending Yogurt on Google - US



# Trending Yogurt on Google - Australia

