

Yogurt and Yogurt Drinks - UK - July 2015

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.



Estimated at just shy of £2 billion, sales of yogurt and yogurt drinks enjoyed estimated growth of 12% in value terms over 2010-15. However, this was driven by rising prices, with volume sales falling by an estimated 4% over the period.

This report looks at the following areas:

- Unrefined sources of sweetness offer route for operators to address health concerns
- High protein content of Greek/Greek-style yogurts presents opportunity to drive interest
- Boosting its indulgence proposition should benefit Greek yogurt

The drinking yogurt segment in particular was hit by EFSA (European Food Safety Authority)'s rejection of health claims related to probiotics in December 2012. The sharp decline in volume sales seen in 2013 continued into 2014.

Meanwhile consumer concerns around the added sugar content of yogurts may have played a role in the troubles of spoonable yogurts, partly offset by the recent growth of the Greek/Greek-style category.

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:
reports@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 2015

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

Overview

What you need to know

Covered in this report

Executive Summary

The market

Figure 1: UK retail value sales of spoonable yogurt and drinking yogurt, 2010-20

Protein a winner in EU health claims

Sugar attracts negative media in 2014

Companies, brands and innovation

Müller leads in spoonable yogurt

Figure 2: UK retail value sales of leading brands in spoonable yogurt, 2014/15*

Müller's adspend nudges ahead of Danone

Yogurts boost the indulgence factor, while others leverage high protein content

The consumer

Two thirds of adults eat yogurt

Figure 3: Usage of yogurt and yogurt drinks, April 2015

Figure 4: Frequency of yogurt and yogurt drinks usage, April 2015

The 'health halo' of yogurts is positive news for the market

Figure 5: Attitudes towards yogurt, April 2015

Thicker texture is distinctive feature of Greek/Greek-style yogurt

Figure 6: Attitudes towards Greek/Greek-style yogurt, April 2015

Healthy toppings at top of product enticements

Figure 7: Interest in selected yogurt/fromage frais product concepts, April 2015

Almost four in 10 adults would be interested in trying quark

Figure 8: Usage of quark, April 2015

Issues and Insights

Unrefined sources of sweetness offer route for operators to address health concerns

The facts

The implications

High protein content of Greek/Greek-style yogurts presents opportunity to drive interest

The facts

The implications

Boosting its indulgence proposition should benefit Greek yogurt

The facts

The implications

The Market – What You Need To Know

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: reports@mintel.com

Yogurt and Yogurt Drinks - UK - July 2015

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.

Value sales grow but volumes fall over 2010-15
 Rejection of probiotic claims and sugar concerns affect 2014
 Modest volume growth predicted
 Ageing population presents a challenge to the industry
 Health claims relating to protein approved by EFSA
 Sugar attracts negative media in 2014
 Increase in incomes should support sales

Market Size and Forecast and Segment Performance

Growth in the market comes on the back of rising prices
 Figure 9: UK retail value and volume sales of spoonable yogurt and drinking yogurt, 2010-20
 Figure 10: UK retail value sales of spoonable yogurt and drinking yogurt, 2010-20

Spoonable yogurt expected to return to volume growth
 Figure 11: UK retail value and volume sales of spoonable yogurt, 2010-20
 Figure 12: UK retail value sales of spoonable yogurt, 2010-20

Effects of EFSA ruling on drinking yogurts linger
 Figure 13: UK retail value and volume sales of drinking yogurt, 2010-20
 Figure 14: UK retail value sales of drinking yogurt, 2010-20

Market Drivers

Ageing population poses challenge to yogurt market
 Figure 15: Trends in the age structure of the UK population, 2010-15 and 2015-20

Consumers find themselves in a better financial situation
 Figure 16: Consumers' financial wellbeing index, February 2009-April 2015

Protein a winner in EU health claims
 Sugar attracts negative media in 2014

Key Players – What You Need to Know

Müller biggest player in spoonable yogurt
 Activia loses market share
 Actimel leads drinking yogurt
 Yogurt strengthens high-protein proposition
 Boundary between yogurts and desserts narrows

Brand Research – Yogurts

What you need to know
 Brand map
 Figure 17: Attitudes towards and usage of selected brands, April 2015

Key brand metrics
 Figure 18: Key metrics for selected brands, April 2015

Brand attitudes: Rachel's evokes most premium connotations
 Figure 19: Attitudes, by brand, April 2015

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: reports@mintel.com

Yogurt and Yogurt Drinks - UK - July 2015

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.

Brand personality: Activia and Müllerlight have accessible and fun brand images

Figure 20: Brand personality – macro image, April 2015

Yeo Valley has a central position, demonstrating an all-round brand image

Figure 21: Brand personality – micro image, April 2015

Brand analysis

Rachel's performance matches premium image

Figure 22: User profile of Rachel's, April 2015

Yeo Valley enjoys greater accessibility than Rachel's

Figure 23: User profile of Yeo Valley, April 2015

Activia has a strong healthy proposition

Figure 24: User profile of Activia, April 2015

Total lacks awareness and strength of brand image compared to others

Figure 25: User profile of Total, April 2015

Müllerlight has healthy and accessible image and generates high usage

Figure 26: User profile of Müllerlight, April 2015

Market Share

Müller leads spoonable yogurt

Activia continues to lose market share

Yeo Valley enjoys strong growth

Figure 27: UK retail sales of leading brands in spoonable yogurt, by value and volume, 2013/14* and 2014/15**

Danone's Actimel leads drinking yogurt by a clear margin

Figure 28: UK retail sales of leading brands in drinking yogurt, by value and volume, 2013/14* and 2014/15**

Launch Activity and Innovation

Yogurt brands leverage high protein content

Yogurts boost the indulgence factor

Chocolate brands explore yogurts

Greek/Greek-style yogurt attracts new launches

Coffee features in limited edition flavours

Yogurt drinks from other countries

Brand Communication and Promotion

Müller's adspend nudges ahead of Danone

Figure 29: Recorded above-the-line, online display and direct mail total advertising expenditure on yogurt and yogurt drinks, 2011-15

Danone Activia Fibre receives adspend in 2015

Alpro's adspend dramatically increases

Yogurt drinks receive adspend support

Figure 30: Share of above-the-line, online display and direct mail total advertising expenditure on yogurt and yogurt drinks, by top 10 brands, 2014

The Consumer – What You Need to Know

Two thirds of adults eat yogurt

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: reports@mintel.com

Yogurt and Yogurt Drinks - UK - July 2015

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.

- Yogurt drinks usage lags behind
- Healthy perception of yogurt good news for the market
- Benefits of Greek/Greek-style yogurt go unknown
- Health-related yogurt product concepts spark interest
- Quark category has potential for growth

Yogurt and Yogurt Drinks Usage

- Two thirds of adults eat yogurt
- Yogurt drinks lag behind
 - Figure 31: Usage of yogurt and yogurt drinks, April 2015
- Only one in 10 users eat yogurt every day
 - Figure 32: Frequency of yogurt and yogurt drinks usage, April 2015

Attitudes towards Yogurt

- The 'health halo' of yogurts is positive news for the market
- Yogurt acknowledged as a good source of protein
- Half of consumers worry about added sugar content
- Half of users are not concerned about naturally occurring sugar in yogurt
 - Figure 33: Attitudes towards yogurt, April 2015

Attitudes towards Greek/Greek-style Yogurt

- Thicker texture is distinctive factor of Greek/Greek-style yogurt
- Healthy attributes of Greek/Greek-style yogurt unknown by many
- Quality of Greek-style yogurt considered as good as Greek yogurt by the majority
 - Figure 34: Attitudes towards Greek/Greek-style yogurt, April 2015

Yogurt Product Enticements

- Healthy toppings at top of product enticements
- A third of consumers want no-added-sugar yogurt made without artificial sweeteners
 - Figure 35: Interest in selected yogurt/fromage frais product concepts, April 2015

Quark Usage

- Almost four in 10 adults would be interested in trying quark
 - Figure 36: Usage of quark, April 2015

<http://reports.mintel.com/display/737707/> >Appendix – Data Sources, Abbreviations and Supporting Information

- Abbreviations
- Fan chart forecast
- Brand Map
- Correspondence analysis

<http://reports.mintel.com/display/737707/> >Appendix – Market Size and Forecast

- Figure 37: UK retail volume sales of spoonable yogurt and drinking yogurt, 2010-20
- Figure 38: UK retail volume sales of spoonable yogurt, 2010-20

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: reports@mintel.com

Yogurt and Yogurt Drinks - UK - July 2015

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 39: UK retail volume sales of drinking yogurt, 2010-20

**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: reports@mintel.com