

Report Price: £1095.00 | \$1417.92 | €1301.30

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



"Milk production and sales have bounced back in 2017 from the turmoil caused by the end of the milk quotas in 2015. While milk usage among Irish consumers remains high, the potential for Brexit to interrupt milk processing on both sides of the border remains a threat to the prosperity of the market."
Brian O'Connor, Senior Consumer Analyst

This report looks at the following areas:

This Report covers the NI and RoI milk and cream market covering fresh liquid milk and cream. Whilst dairy-free alternatives are discussed throughout the Report, they are not included in the Market Size and Forecast section.

BUY THIS REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533

> Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

арас +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



Report Price: £1095.00 | \$1417.92 | €1301.30

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

Issues covered in this Report

Executive Summary

The market

Figure 1: Estimated retail sales of liquid milk, by segment, by volume, RoI and NI, 2016

Forecast

Figure 2: Indexed estimated retail sales of liquid milk, by value, RoI and NI, 2012-22

Figure 3: Estimated value of cream sales, NI and RoI, 2012-22

Market factors

Milk production increasing from 2016-17

Milk farmgate prices increase in 2017

Brexit an issue for cross-border milk supply

Protein diet helping to drive milk usage

Companies and innovations

The consumer

Whole milk sees strong RoI usage, semi-skimmed strong NI usage

Figure 4: Types of milk that consumers have used or served in the last three months, NI and RoI, June 2017

Figure 5: Types of milk alternatives that consumers have used or served in the last three months, NI and RoI, June 2017

Double cream used in NI, RoI prefer single cream

Figure 6: Types of cream that consumers have used/ served in the last three months, NI and RoI, June 2017

Farmer and animal welfare very important to Irish consumers

Figure 7: Features that consumers would like to see more of for milk products in the future, NI and RoI, June 2017

Supporting Irish dairy farmers a key attraction for Irish consumers

Figure 8: Agreement with statements related to milk and cream, NI and RoI, February 2017

The Market – What You Need to Know

Milk sales to return to growth

Milk production increases in NI and RoI in 2017

Brexit an issue for cross-border milk supply

Protein content helping to drive interest in milk

Market Size and Forecast

2017 to see return to growth for milk sales

Figure 9: Estimated retail sales of liquid milk, by value, IoI, RoI and NI, 2012-22

Volume sales of milk see growth

Figure 10: Estimated retail sales of liquid milk, by volume, IoI, RoI and NI, 2012-17

Whole milk continues to be more popular in RoI

BUY THIS REPORT NOW



Report Price: £1095.00 | \$1417.92 | €1301.30

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

Figure 11: Estimated retail sales of liquid milk, by volume, by type of milk, IoI, RoI, 2013-17

Semi-skimmed volume sales dominate NI

Figure 12: Estimated retail sales of liquid milk, by volume, by segment, NI, 2016

Cream sales improve despite milk quotas

Figure 13: Estimated value of cream sales, IoI, NI and RoI, 2012-22

Figure 14: Selected types of activities that consumers have done/ taken part in during the last three months, on a weekend night, NI and RoI, October 2016

Market Drivers

Domestic milk production increased in 2016

Figure 15: Domestic milk intake for processing vs. imported milk intake, RoI, 2013-17

NI milk production expected to bounce back in 2017

Figure 16: Domestic milk production, in litres (m), NI, 2013-17

Milk prices increasing in 2017

Figure 17: Price paid to producers per litre, NI, January 2013-June 2017

Figure 18: Price paid to producers per litre, RoI, January 2013-June 2017

Consumer milk prices increase in NI

Figure 19: Consumer price indices for milk, NI, January 2013-July 2017

Figure 20: Consumer price indices for milk, RoI, January 2013-July 2017

Brexit a threat to cross-border milk processing

RoI processors preparing for Brexit

Protein trend continues apace in 2017

Figure 21: Top five perceived benefits of eating or drinking high-protein food and drinks, NI and RoI, February 2017

Key Players and Innovations – What You Need to Know

Kerry's consumer foods division delivering flat sales for the Group

Retailers and brands integrating ethics into their product offering

Low/no/reduced claims in milk and cream continue to grow

Industry figures warn of potential shortfall in cream and butter supply over Christmas period

Who's Innovating?

Milk and cream new product launch overview

Figure 22: Top five cream flavours in new product launches, UK and Ireland, 2013-17*

Figure 23: Top 10 claims for new products launched in cream category in UK and Irish markets, 2013-17*

L/N/R allergen cream products launched in the UK and Ireland

Figure 24: Top 10 new milk flavours launched in the UK and Ireland, 2013-17*

Figure 25: Top 10 claims for new milk products launched in UK and Ireland, 2013-17*

Gluten-free Milk Products

L/N/R claims in new milk products launched

Fortified or added nutrient milk products

Companies and Brands

Arla Foods UK

BUY THIS REPORT NOW



Report Price: £1095.00 | \$1417.92 | €1301.30

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

Key facts			
Product portfolio			
Brand NPD			
Recent developments			
Connacht Gold			
Key facts			
Product portfolio			
Recent developments			
Dale Farm			
Key facts			
Product portfolio			
Recent developments			
FrieslandCampina			
Key facts			
Product portfolio			
Brand NPD			
Recent developments			
Glanbia Plc			
Key facts			
Product portfolio			
Recent developments			
Ornua			
Key facts			
Product portfolio			
Recent developments			
Kerry Group Plc.			
Key facts			
Product portfolio			
Recent developments			
Strathroy Dairy			
Key facts			
Product portfolio			
Recent developments			

NI and RoI consumers have disparate milk preferences Double cream used in NI, RoI prefer single cream Farmer welfare front of mind for future considerations Consumers will pay extra to support Irish dairy farmers

Types of Milk and Milk Substitutes Used

BUY THIS REPORT NOW



Report Price: £1095.00 | \$1417.92 | €1301.30

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

RoI consumers prefer whole milk, NI skimmed milk

Figure 26: Types of milk that consumers have used or served in the last three months, NI and RoI, June 2017

Whole milk

Figure 27: Consumers who have used or served full-fat/ whole milk in the last three months, by age, NI and RoI, June 2017

Figure 28: Top five factors that consumers are concerned about in relation to food and non-alcoholic drinks, NI and RoI, June 2017

Semi-skimmed milk more popular in NI

Figure 29: Consumers who have used or served semi-skimmed milk in the last three months, by age, NI and RoI, June 2017

Figure 30: Agreement with the statement 'It is worth paying more for highly nutritious foods (eg high in vitamins, minerals etc)', by social class, NI and RoI, August 2016

RoI consumers more likely to buy functional milks

Figure 31: Consumers who have used or served milk with added functional benefits (eg calcium/protein) in the last three months, by age, NI and RoI, June 2017

Almond/ rice-based milks leading non-dairy alternatives

Figure 32: Types of milk alternatives that consumers have used or served in the last three months, NI and RoI, June 2017

Figure 33: New product launches of plant-based dairy alternatives, UK and Ireland, 2012-17

Types of Cream Used

NI consumers prefer double cream, RoI single cream

Figure 34: Types of cream that consumers have used/ served in the last three months, NI and RoI, June 2017

Double cream usage high among all NI demographics

Figure 35: Consumers who have used or served fresh double cream in the last three months, by gender and age, NI and RoI, June

Figure 36: Consumers who have used or served fresh double cream in the last three months, by location, RoI, June 2017

Single cream usage higher among mature consumers

Figure 37: Consumers who have used or served fresh double cream in the last three months, by age, NI and RoI, June 2017

Features Consumers Want in Milk

Offering fair price to farmers a key future consideration

Figure 38: Features that consumers would like to see more of for milk products in the future, NI and RoI, June 2017

Guaranteeing fair prices to farmers more important to women and mature consumers

Figure 39: Consumers who would like to see milk that guarantees a fair price to farmers in the future, by gender and age, NI and RoI, June 2017 Figure 40: Who is responsible for the main grocery shop in their household, by gender, NI and RoI, November 2016

Local sourcing more important to mature consumers

Figure 41: Consumers who would like to see milk that has been sourced locally in the future, by age, NI and RoI, June 2017

High animal welfare more important to women

Figure 42: Consumers who would like to see milk sourced from cows with high animal welfare (ie free-range) in the future, by gender, NI and RoI, June 2017

Attitudes towards Milk and Cream

Consumers willing to pay more to support farmers

Figure 43: Agreement with statements related to milk and cream, NI and RoI, February 2017

Fair pay to farmers more important to the young

Figure 44: Agreement with the statement 'I would be willing to pay 20p/20c more for milk if it guaranteed a fair price for Irish farmers', by age, NI and RoI, June 2017

Three in 10 want smaller cream packets

Figure 45: Agreement with the statement 'I would like to see more cream in smaller packages to avoid waste', by age of children, NI and RoI, June 2017

BUY THIS REPORT NOW



Report Price: £1095.00 | \$1417.92 | €1301.30

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

Over a quarter pick grocery shop based on price of milk

Figure 46: Agreement with the statement 'The price of milk affects where I do my grocery shopping', by work status, NI and RoI, June 2017

RoI consumers show higher preference for bottles

Figure 47: Agreement with the statement 'Milk in a bottle is better quality than milk in a carton', by gender and age, NI and RoI, June 2017

Appendix – Data Sources, Abbreviations and Supporting Information

Definition

Market size rationale Data sources Generational Cohorts Abbreviations

BUY THIS REPORT NOW