

Yogurt - China - 2021

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This report looks at the following areas:

- Market growth and competition trends in the yogurt sector
- The performance of chilled and ambient yogurt and how each segment will evolve
- Innovative product launches and marketing activities for yogurt
- Consumers' consumption purpose and spending habits across different types of yogurt
- Positioning strategy for both traditional yogurt and new yogurt formats

52% of ambient yogurt heavy users are also heavy users of chilled drinking yogurt, suggesting a strong substitution relationship between the two and a growth opportunity for chilled yogurt to catch up with the ambient segment.

COVID-19 has enhanced health management among consumers, but has also changed consumers' purchase behaviour with them shopping more online. Since sales of chilled products depend considerably on discretionary spending via offline channels and consumers generally have concerns around preservation with chilled product deliveries, changing purchase behaviour could lead to a slowdown in prospective growth for chilled yogurt.

The biggest threat to the yogurt market is the accelerated growth of chilled plain milk in recent years. The promising outlook has caused dairy companies to focus their businesses on milk instead of the yogurt business, thus leading to a slowdown in yogurt product innovation that will hamper long-term growth for the sector.

Brands need to be aware of the divergence in spending habits and consumption purposes across different consumer groups and design positioning strategies accordingly. Mintel believes that non-digestive functions and indulgence positionings could be separately applied to products of different prices, to make the marketing relevant to different need spaces and potentially increase the overall retail sales of yogurt.



"The growth of ambient yogurt continues to outpace chilled yogurt, but it is facing a threat from chilled drinking yogurt, especially those products with high protein claims. Digestion improvement remains the top consumption purpose while the need for other functions and indulgence varies across consumer groups."

– Joy Yin, Senior Research Analyst

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