

THE FUTURE OF BUTTER AND YELLOW FATS: 2019

Global Annual Review: what's now and what's next for the butter and yellow fats market.



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Drink



Report Content



- A look back, and a look ahead

THE BIG STORIES

- Mintel's perspective

The rise of ghee

- Ghee could be the next coconut oil
- Ghee-volution
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 - Graph 1: ghee's share of butter NPD in each region, 2014/2018
- A focus on flavour and pureness

More potential for clean label

- Yellow fats face a challenge ahead and must compete with butter's superior image
 - Graph 2: perceptions of butter, margarine and other blends, March 2018
- Despite consumer demand, natural claims have dropped in vegetable-based spreads
 - Graph 3: natural claims in margarine and other blends, Dec 2016–Nov 2018
- Brands harnessing clean label attributes

Increasing usage by adding value

- Consumers replacing spreads with nut butters
- Can added functionality increase frequency of butter and vegetable-based spread consumption?
- Functionality is still trending to meet consumer desire for total wellbeing

IN THE NEXT TWO YEARS

- Mintel's perspective

Repositioning spreads to health trends

- Tapping into the vegetarian/vegan health agenda
 - Graph 4: penetration of vegetarian and vegan claims on launches of butter, margarine and other blends, Dec 2013–Nov 2018
- Spreads can reinforce health credentials to meet consumer needs
- Alternative oils continue to emerge in plant-based spreads

Butter to get star treatment

- The indulgent "dirty buns" craze drives butter production in Asia Pacific

The Future of Butter and Yellow Fats: 2019

- Butter gives gourmet cues to restaurant menus
- Premiumising butters and spreads with blends and foodservice trends
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Sustainability is becoming increasingly important

- Bring marketing back to the farm
- Land O'Lakes: from dairies to dinner
- Addressing waste with aquafaba
- Packaging challenges could lie ahead with potential to add cost

IN FIVE YEARS AND BEYOND

- Mintel's perspective
- Recruiting farmers for the future
- Reducing waste with nose to tail
- Is algae butter/oil the future?

KEY MARKET DATA

- Brazil continues to up its innovation and the US and France move back into the top five
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 - Graph 5: butter and yellow fats, new product launches, top five countries, Dec 2017-Nov 2018
- The fastest growth is coming from Russia and APAC, the slowest from Europe
- The heaviest users of butter and yellow fats are in Europe
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 - Graph 6: butter and yellow fats, retail market per capita consumption (kg), top five markets, 2018 (est)
- Butter innovation has increased by 4% whilst yellow fats have decreased by 9% over the last three years
 - Graph 7: butter and yellow fats, new product launches by subcategory, Dec 2017-Nov 2018
- Fat and allergen claims lead in yellow fats, with sodium, vegetarian, and organic claims more prevalent in butter

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