

# YOGURT AND YOGURT DRINKS – GERMANY – 2023

German consumers look to yogurt to support their immune and gut health and care about low sugar content. Ongoing inflation will have a strong impact in 2023.



Henrike Philipp, Research Analyst



# Yogurt And Yogurt Drinks - Germany - 2023

## This report looks at the following areas:

- The short-, medium- and long-term impact of inflation on yogurt/yogurt drinks sales and consumer behaviour
- Types of yogurts/yogurt drinks eaten and frequency of usage, with parents and older consumers being the most frequent users
- Behaviour related to yogurt/yogurt drinks with special focus on gut health and immune system
- Important attributes in spoonable yogurt and yogurt drinks, with low sugar being the top attribute
- Attitudes towards yogurt/yogurt drinks, including children's yogurts
- Trends in launch activity for yogurt and yogurt drinks, and opportunities for further innovation



German consumers look to yogurt to support their immune and gut health and care about low sugar content. Ongoing inflation will have a strong impact in 2023.

## Overview

Milk prices have been driven up by **high energy and fertiliser costs** resulting from the Ukraine conflict and rising fodder prices caused by droughts. Despite yogurt only attracting **7% VAT**, its price will rise strongly as a result. **81% of Germans** have been affected by food/drink price hikes and, with **49% saying they are worse off vs a year ago**, it is likely **price-sensitive Germans will trade down to cheaper yogurt types, private label options or curb usage**.

The older generations are the most frequent users of yogurt: **60% of over 65s vs 46% of 16-24s** eat yogurt at least twice a week. But brands have scope to expand usage among younger

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consumers by providing innovative flavours, offering yogurt with a high protein content and expanding their plant-based options.

Yogurt is also very popular with parents: **59% of parents** think dairy yogurt should be a **staple in a child's diet** and **67% of parents of children aged 0-15** buy yogurt to give to children as a snack. However, **52% of parents** agree that standard yogurt is more appealing to give to children than yogurt designed specifically for children, possibly because of concerns about the sugar content of children's versions. Low sugar is also **the top attribute for German yogurt consumers** when choosing yogurt.

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# Report Content

## EXECUTIVE SUMMARY

### Key issues covered in this Report

- Overview
- The five-year outlook for yogurt and yogurt drinks

### Market context

- Income squeeze will dampen sales growth
- Healthy eating is high on consumers' and government's agendas
- Competition from dairy alternatives

### Mintel predicts

- Retail volume sales will decline, while value sales rise with high inflation
- Market size & forecast
- Strong value growth is expected
- Volume sales are forecast to decline

### Opportunities

- Position yogurt drinks as energy boosters
- Target younger consumers with novel flavours
- Focus on immune system and gut health support
- Look to reduce yogurt's sugar content
- Provide guidance for parents

### The competitive landscape

- Brands dominate value sales of yogurt/yogurt drinks
  - Graph 1: company retail market share of yogurt/yogurt drinks, by volume and value, 2021
- Quick download resources

## MARKET DRIVERS

### The German economy

- The cost of living crisis is holding back the post-COVID-19 recovery
  - Graph 2: key economic data, in real terms, 2019-24
- Inflation continues to be the key concern in 2023 for consumers, brands and the economy...
- ...impacting financial wellbeing and consumer expenditure
- Rising prices pose a challenge for yogurt consumers

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- Graph 3: conventional milk prices, 2020-22
- Hike in prices will trigger trading down for some

## Health

- Competition from dairy alternatives driven by health and wellbeing concerns
- Government reduction strategy on salt, sugar and saturated fat
- Low sugar is the most desired attribute in yogurt and yogurt drinks
  - Graph 4: most important attributes in spoonable yogurt, 2022
- The Nutri-Score will drive usage of BFY yogurts and level the nutritional playing field in the long term
- Good Nutri-Score ratings attract buyers
  - Graph 5: yogurt NPD by share of Nutri-Score ratings, 2018-22

## Packaging

- Consumers are concerned about plastic packaging...
- ... but recyclability is improving

## Demographics

- Ageing population can benefit yogurt sales
  - Graph 6: consumption of yogurt once a week or more, by yogurt consumers by age, 2022
- International inspiration: positive ageing messages

# WHAT CONSUMERS WANT AND WHY

## Consumption of yogurt/yogurt drinks

- Eight in 10 Germans consume yogurt/yogurt drinks
  - Graph 7: types of yogurt/yogurt drinks eaten/drunk, 2022
- Most frequent users are older generations and parents
  - Graph 8: frequency of eating/drinking yogurt/yogurt drinks, 2022
- Increase the appeal of yogurt drinks
- Make yogurt more appealing to younger consumers with energy claims and interesting flavours
- Excite younger consumers with dairy alternatives

## Behaviour related to yogurt/yogurt drinks

- Environmental concerns and personal health are front of mind for yogurt consumers
  - Graph 9: behaviour related to yogurt/yogurt drinks, 2022
- Brands need to reassure environmentally conscious consumers
- Offer blends of dairy and non-dairy products
- Plant-based range extensions are gaining traction
- Healthy eating is of utmost importance
- Consumers are looking to yogurt to support their immune system

- Gut health also plays a central role
- Large pouches have niche interest, but hold potential

### Attributes of yogurt and yogurt drinks

- Low sugar is a top priority...
  - Graph 10: important attributes in spoonable yogurt vs yogurt drinks/fermented drinks, 2022
- ...as consumers look to reduce their sugar intake
- Low sugar content is especially important in dairy alternatives
- Integrate hyperlocalism into product offerings
- Drive interest in probiotics, minerals and vitamins
- Combination of probiotics and yogurt
- Making own yogurt at home can create excitement

### Attitudes towards yogurt/yogurt drinks

- Consumers value yogurt for children
  - Graph 11: attitudes towards yogurt/yogurt drinks, 2022
- Dispel parents' doubts about children's yogurts
- Provide guidance for parents
- Parents want yogurts that support their child's health
- Consider more plant-based innovation for children
- Educate about healthy attributes of dairy alternatives
- Dairy alternatives have improved in taste
  - Graph 12: non-dairy yogurts/yogurt drinks are tastier than dairy ones, 2020 vs 2022

## LAUNCH ACTIVITY AND INNOVATION

- Environmental claims take the lead
  - Graph 13: launches of yogurt/yogurt drinks with select ethical/environmental claims, 2017 and 2022
- Brands should highlight their ethical commitments...
- ...while addressing concerns about animal welfare
- Vegan yogurts become established
- Functional health claims gain traction
- Combine wellness with support for the immune system
- Attract younger consumers with high protein yogurt
- Internationally inspired foods become more mainstream
- Use filmjölk as inspiration
- Natural yogurts appeal to consumers
- Novel flavours in dairy alternatives
- Yogurt flavours can take inspiration from drinks

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- Unusual flavours attract consumer attention
- Create a sense of limited availability with seasonal flavours

## Advertising and marketing activity

- Müller collabs with esports IEM Cologne 2022
- Süper lecker!
- Activia promotes fibre content

## MARKET SHARE

- Danone and Ehrmann lead yogurt/yogurt drink sales

### Retail market share of yogurt/yogurt drinks, by value, 2020-21

- Danone holds top position in the yogurt/yogurt drink market both in value...

### Retail market share of yogurt/yogurt drinks, by volume, 2020-21

- ...and volume terms in 2021

## MARKET SIZE, SEGMENTATION AND FORECAST

- Value sales see inflation-driven rises, while volume falls
- Value sales are rising
- Volume sales are declining
- Drinking yogurt saw big growth in 2021 in value...
- ... and volume

## APPENDIX

### Appendix – products covered, abbreviations, consumer research methodology and language usage

- Products covered in this Report
- Abbreviations
- Consumer research methodology
- A note on language

### Appendix – market size and central forecast methodology

- Forecast methodology
- Forecast methodology – fan chart
- Market size – value
- Market size – volume
- Market forecast and prediction intervals – value
- Market forecast and prediction intervals – volume

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