

YOGURT AND YOGURT DRINKS – US – 2023

Yogurt is in demand among US consumers as a protein boost and gut supporter. Its perceived health benefits and convenience maintain its relevance as a staple.



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Yogurt And Yogurt Drinks - US - 2023

This report looks at the following areas:

- The short-, medium- and long-term affects of inflation on yogurt/yogurt drinks sales and consumer behavior
- Reported consumption of types/styles of yogurts and yogurt drinks
- Anticipation of future usage of yogurt/yogurt drinks and reasons for expected increases in consumption
- Health attributes of importance in yogurt/yogurt drink choice, with probiotics being the top attribute
- Attitudes towards yogurt/yogurt drinks in regards to usage perceptions
- Trends in launch activity for yogurt/yogurt drinks and opportunities for further innovation



Yogurt is in demand among US consumers as a protein boost and gut supporter. Its perceived health benefits and convenience maintain its relevance as a staple.

Overview

Yogurt is a staple in US households with 84% of consumers reporting purchases of yogurt and yogurt drinks. With rising prices, price-sensitive consumers may trade down to the basics and private labels. Yogurt continues to be well-positioned with its perceived nutritional benefits, affordability and convenience. Its inherent versatility and health attributes that align with current health trends (eg protein, digestion and immunity) maintain its relevance and encourage continued usage.

Consumers tend to stick to the basics when consuming yogurt, with fruit-forward, spoonable varieties reportedly being the top purchase. Across demographic groups, from generations to

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parental status, reported yogurt purchasing is high, highlighting continued relevance regardless of demographic group or lifestage.

When it comes to choosing yogurt, nutrition and convenience are at the core of decision making. While innovation is important, brands must keep health and ease at the center to meet consumer expectations for this category. The largest opportunities for expansion exist in emphasizing inherent health attributes of yogurt (eg protein, probiotics) and highlighting convenient portability of more-novel formats such as drinks, tubes and pouches.

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Report Content

EXECUTIVE SUMMARY

- What you need to know
- Consumer trends: key takeaways
- Traffic light chart: yogurt and yogurt drinks
- Opportunities

CONSUMER INSIGHTS

The yogurt consumer: fast facts

Yogurt consumption

- Uncertainty puts the brakes on adventurous yogurt exploration
 - Graph 1: yogurt types purchased in the past three months, 2022-23
- Traditional yogurts win, but space for intentional innovation remains
- Encourage expeditions into new yogurt territories: from tubes, pouches, drinks and beyond
 - Graph 2: yogurt types purchased in the past three months, 2022-23
- Target innovation at Gen Zs and Millennials to cultivate budding segments
 - Graph 3: yogurt types purchased in the past three months, by generation, 2023
- Yogurt drinks & pouches: the holy grail for hybrid workers
 - Graph 4: yogurt drinks and tube/pouches purchased, by work from home status, 2023
- Opportunity to expand yogurt pouches and drinks to new groups is prime, but maintaining child-friendliness remains key
 - Graph 5: yogurt drinks and tube/pouches purchased, by parental status, 2023
- Align health benefits for both adults and children to highlight yogurt pouches' and drinks' value across demographics
 - Graph 6: children's health and wellness concerns, 2022
 - Graph 7: growing health priorities, 2022

Yogurt styles

- US consumers stay loyal to familiar yogurt styles
- Skepticism for "other" yogurt varieties outside of regular and Greek, remains high
 - Graph 8: yogurt styles purchased in the past three months, 2022-23
- Processed perception and high price of non-dairy yogurt is leading to low acceptance as a 1:1 yogurt alternative
 - Graph 9: non-dairy yogurt styles types purchased in the past three months, 2022-23
- Accentuate unique properties of non-dairy yogurts
- Whisk Millennials away on a foodie adventure with global yogurt styles
 - Graph 10: yogurt styles purchased in the past three months, by generation, 2023

Yogurt formats

- Foundation is strong for spoonable varieties
 - Graph 11: spoonable yogurt formats typically purchased in the past three months, 2023
- Success is born from mastering the fundamentals
- Gen Zs and Millennials embrace innovation, yet convenience and health must remain central
 - Graph 12: spoonable yogurt formats typically purchased in the past three months, by generation, 2023

Anticipation of purchase

- The yogurt category is "whey" far from slowing
 - Graph 13: anticipation of change in household consumption of yogurt in the next 12 months, 2022-23
- Yogurt's convenience, snackability and high nutrition at an affordable price is a winning equation for growth
- Consumers find value in yogurt's easy, health boosting properties
 - Graph 14: reasons for an anticipated increase in yogurt consumption, 2023
- Low-cost snackability resonates across financial situations
 - Graph 15: reasons for an anticipated increase in yogurt consumption, by financial situation, 2023
- Showcase the value of nutrition and satiety of yogurt to financially hard-pressed shoppers
- Engage women with an emphasis on positive nutrition
 - Graph 16: reasons for an anticipated increase in yogurt consumption, by gender, 2023

Attributes of importance in yogurt choice

- Blend desirable health benefits for a winning yogurt
- Clearly align claims with current health trends
 - Graph 17: attributes considered to make yogurt healthy, 2023
- Give children a boost with positive, holistic nutritional benefits
 - Graph 18: attributes considered to make yogurt healthy, by parental status, 2023
- Become a partner to parents to support their children's development
- From gut supporter to protein-rich power source, perceptions of yogurt are changing
 - Graph 19: attributes considered to make yogurt healthy, by generation, 2023
- Protein powers Gen Zs' and Millennials' journey to good health
 - Graph 20: experience with, or interest in, food and drink products with protein, 2022
- Get creative with formats and health attributes to entice young super-snackers to the yogurt category

Yogurt usage

- Encourage consumers to adopt yogurt consumption into numerous parts of their day
 - Graph 21: occasions of yogurt types, 2023
- Limited perception of use cases of non-spoonable yogurt stunts growth
- Integrate yogurt into lunch routines
- Multi-serve yogurt tubs can be a blank canvas, meeting the needs of parents and their children
 - Graph 22: multi-serve tub yogurt occasions, by parental status, 2023

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- Demonstrate cost-saving benefits of multi-serve yogurt's multifunctionality
- Yogurt pouches and drinks: the new addition to Gen Zs' growing snack repertoire
 - Graph 23: yogurt snacking occasions, by generation, 2023

Yogurt attitudes

- Yogurt's positive health image is #1 in people's attitudes toward the category
 - Graph 24: attitudes toward yogurt, 2023
- Parents have a positive perception of non-dairy yogurt
 - Graph 25: attitudes toward yogurt, by parental status, 2023
- Inspire play with mix-in and use ideas for Millennial and Gen Z yogurt consumers
 - Graph 26: US, attitudes toward yogurt, by generation, 2023

COMPETITIVE STRATEGIES

Launch activity and innovation

- Dessert-inspired yogurts face an identity crisis
 - Graph 27: [no title]
- However, brand familiarity can breed potential success with indulgent yogurts
 - Graph 28: [no title]
- Keep health, convenience and affordability at the core of indulgent flavor innovation
- Potential for co-branded yogurts for nostalgia
- Familiarity reduces concerns of spending money on the unknown
- Sweetness without sacrifice; potential for low-/no-sugar yogurt
- Yogurt launches with minus sugar claims are falling, yet interest remains high
 - Graph 29: launches of spoonable yogurt and yogurt drinks with minus sugar claims, 2018-23
- Yogurt: the natural energy boost for performance
- Chobani Complete Advanced Nutrition
 - Graph 30: performance comparison of Chobani Strawberry Cream Advanced Nutrition Yogurt vs drinking yogurt & liquid cultured milk, 2023
- Resealable kids' yogurt pouches for less-mess yogurt consumption
- Yogurt pouches are getting a child-friendly lift with added portability and nutritional benefits
 - Graph 31: performance comparison of GoGo SqueeZ Yogurtz strawberry & blueberry flavor vs drinking yogurt & liquid cultured milk, 2023
- Assurance is developing trust in parents
 - Graph 32: [no title]
- Yogurt travels across category boundaries
- From snack to ingredient: yogurt is getting a refresh
 - Graph 33: yogurt & Greek yogurt ingredient occurrences, 2018-23

Marketing and advertising

- Authenticity and social responsibility deepens connection with consumers
- Engaging rights in a meaningful way is building trust and confidence in consumers, who want to see brands take measurable action
- Social and environmental initiatives boost brand story
- Yogurt brands lean into performance and workout recovery benefits
- Protein-forward yogurts are positively perceived
 - Graph 34: [no title]
- From Instagram to TikTok: yogurt takes center-stage in social media recipes, opening opportunities for brands to participate
- Highlighting cost-saving and convenient meal solutions with yogurt creates value for consumers
- Brands stress yogurt's versatility for meal time solutions
- Expanding usage reach with brand partnerships
- Limited-time offers; innovation without oversaturation
- Non-dairy yogurt brands align with non-dairy milk counterparts
- Potential to expand yogurt's bounds across categories through beauty care

THE MARKET

Market context

Market drivers

- Decreasing funds lead to grocery budget cuts
- Consumers find value in yogurt
 - Graph 35: [no title]
 - Graph 36: percent of product launches by total pack size, 2018-23
- Private-label yogurts aren't sleeping on innovation
- Consumers are turning to yogurt for health
- Go beyond nutrition claims by highlighting tangible benefits
 - Graph 37: experience with, or interest in, food or drink products that claim to provide health benefits, 2022
- Taste and value win in yogurt, challenging plant-based formulations
 - Graph 38: [no title]
 - Graph 39: performance comparison of plant-based yogurt and dairy yogurt and yogurt drinks, 2023
- Global yogurt varieties grow with a progressively diverse nation
- Yogurt drinks are carriers of culture

Market size and forecast

- Retail sales and forecast of total yogurt
- Retail sales and forecast of total yogurt at current prices

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- Retail sales and forecast of total yogurt at inflation-adjusted prices
- Novel uses needed to cultivate the yogurt category
- Market size and forecast

Market segmentation

- Retail sales and forecast of spoonable yogurt, tubes & pouches
- Retail sales of spoonable yogurt, tubes and pouches at current prices
- Retail sales of spoonable yogurt, tubes and pouches at inflation-adjusted prices
- Spoonable yogurt, tubes and pouches will fall without developing new use cases and better portability
- Retail sales and forecast of yogurt drinks
- Retail sales of yogurt drinks at current prices
- Retail sales of yogurt drinks at inflation-adjusted prices
- Yogurt drinks prospering as they meet a growing demand for convenience

Market and brand share of yogurt and yogurt drinks

- Sales of yogurt and yogurt drinks, by channel
- Multi-outlet sales of yogurt and yogurt drinks, by leading companies and brands
- Multi-outlet sales of spoonable yogurt, tubes and pouches, by leading companies and brands
- Multi-outlet sales of yogurt drinks, by leading companies and brands
- Brand performance: :ratio
- Brand performance: Chobani
- Brand performance: Lifeway Kefir
- Brand performance: So Delicious
- Brand performance: YoCrunch
- Yogurt drink brand performance: from Chobani to Two Good and beyond
- Sales are on the rise for yogurt brands

APPENDIX

Data sources and abbreviations

- Market definition
- Consumer research methodology
- Generations
- Abbreviations and terms
- Forecast
- Fan chart

The market

- Retail sales and forecast of total yogurt at current prices

Yogurt and Yogurt Drinks – US – 2023

- Retail sales and forecast of total yogurt at inflation-adjusted prices
- Total US retail sales of yogurt and yogurt drinks, by segment
- Average annual household spending on yogurt and yogurt drinks
- Retail sales of spoonable yogurt, tubes and pouches at current prices
- Retail sales of spoonable yogurt, tubes and pouches at inflation-adjusted prices
- Value, average price and volume of multi-outlet spoonable yogurt/tubes/pouches sales
- Retail sales of yogurt drinks at current prices
- Retail sales of yogurt drinks at inflation-adjusted prices
- Value, average price and volume of multi-outlet yogurt drink sales
- Retail sales of yogurt and yogurt drinks, by channel
- Supermarket sales of yogurt and yogurt drinks, at current prices
- Sales of yogurt and yogurt drinks through other retail channels, at current prices
- Multi-outlet sales of yogurt and yogurt drinks, by leading companies and brands
- Multi-outlet sales of spoonable yogurt, tubes, and pouches, by leading companies and brands
- Multi-outlet sales of yogurt drinks, by leading companies and brands

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