

YOGURT & DRINKING YOGURT – IRELAND – 2024

As the cost-of-living crisis forces consumers to seek affordable healthy eating options, simplicity and better-for-you claims are poised to flourish.



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Yogurt & Drinking Yogurt - Ireland - 2024

This report looks at the following areas:

- The dual impact of rising consumer living costs and production costs within the Irish dairy industry
- How yogurt brands must navigate government sustainability and health standards to ensure opportunities do not become threats
- Key trends in recent launch activity and future product development opportunities
- Yogurt/yogurt drinks' position as both a guilt-free treat and as a staple in a healthy diet, with the most appealing attributes for each context
- The growing popularity of plain and flavoured yogurts within the younger and older age groups, and the opportunity to tap into usage as an ingredient in other meals
- Consumer attitudes, and the changing consumer perception of sweeteners and artificial ingredients



As the cost-of-living crisis forces consumers to seek affordable healthy eating options, simplicity and better-for-you claims are poised to flourish.

Overview

The cost-of-living crisis is seeing consumers turn to own-label items – forcing premium brands to reconsider value propositions in the current climate.

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Report Content



EXECUTIVE SUMMARY

Opportunities for the yogurt & yogurt drinks sector

- Opportunity for traditional and unprocessed amid UPF trend
- Better-for-you claims to facilitate guilt-free indulgence
- Opportunity for packaging innovation in light of environmental concerns
 - Graph 1: interest in yogurt/yogurt drinks in returnable pots, 2023

Market dynamics and outlook

- The five-year outlook for yogurt & drinking yogurt
- Yogurt sales value increases by way of inflation
- Strong gains in market value
- Growth expected to slow down
 - Graph 2: retail value sales of spoonable and drinking yogurt, NI and RoI, 2018-24
- Consumer prices for yogurt are increasing
 - Graph 3: Consumer Price Index for yogurt , 2019-23
 - Graph 4: Consumer Price Index for yogurt , 2019-23
- Discounters and own labels threaten brand success
- Dairy farmers at the mercy of environmental action
- Health and wellness trends will sustain yogurt demand

What consumers want and why

- Four in five use yogurt
- Flavoured yogurt with the highest levels of consumption
 - Graph 5: types of yogurt/yogurt drinks typically eaten, NI and RoI 2023
- Morning habits present opportunity at breakfast time
 - Graph 6: typical breakfast when eating eat home, 2022
- Consumers want to be informed on healthy choices
- Consistent interest in sustainable packaging solutions, poised to grow further
 - Graph 7: interest in yogurt/yogurt drinks in returnable pots, 2023
- Half avoid artificial sweeteners in RoI – fuelled by anti-UPF movement
- Consumers want to be informed on how to eat healthier
 - Graph 8: consumers who want it to be easier to identify healthy yogurts/yogurt drinks in the supermarket aisle, by age, 2023

Innovation and marketing

- Dairy alternatives forced to innovate and limit ingredients
- Consumer demand for new flavours is not represented in stagnating NPD
- Brands adapting convenience messaging to fit fast-paced consumer lifestyles
 - Graph 9: convenience claims as a percentage of all yogurt/yogurt drink launches, 2019-23

MARKET DYNAMICS

Market size

- Inflation bolsters retail value
 - Graph 10: retail value sales of spoonable and drinking yogurt, 2018-24
- Consumers facing higher costs

Market forecast

- Market expected to see future growth, though a slowdown is expected
 - Graph 11: retail value sales of spoonable and drinking yogurt, Iol, NI and Rol, 2019-24
- Spending control will smooth out yogurt value

Market drivers

- Yogurt prices are increasing across the UK and Ireland
 - Graph 12: Consumer Price Index for all food and non alcoholic beverages vs yogurt , Nov 19-23
 - Graph 13: Consumer Price Index for all food items vs yogurt , Nov 19-23
- Consumers prioritise price when carrying out their food shop
- In times of need, consumers turn to discounters
 - Graph 14: consumer financial situation, 2023
- Premium branded products lose ground to supermarket own-label ranges
- Diminishing birth rates could undercut demand for children's yogurt snacks
 - Graph 15: number of the total population aged 9 or under, NI 1991-2022
- Ageing population could unlock further potential for functional yogurt products
 - Graph 16: number of the population aged 55 and over, 2000-22
- Environmental concern to disrupt Ireland's dairy industry
- Consumers support equitable pay for farmers
 - Graph 17: behaviours related to dairy and dairy alternative drinks, milk and cream, 2023
- Locavore trend will keep the spotlight on Irish farmers
- Robust growth prospects for yogurt consumption among young consumers and parents of young children
 - Graph 18: consumers who have tried to lose weight in the past 12 months, by age of children in household, NI and Rol, 2022
- Government and NGO campaigns to address worrying health statistics

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- Sweetened and high-fat yogurts impacted by new HFFS legislation
- Rol's existing HFSS laws
- Diet and its impact on wellness
- Gut health in the limelight, driven by female population
- Other health catalysts influencing the yogurt category

WHAT CONSUMERS WANT AND WHY

Types of yogurt/yogurt drink consumed

- 83% of Irish people are consuming yogurt or yogurt drink products
- High levels of growth in over-65s' consumption of yogurt products
- Yogurt drinks gain momentum
- Irish consumers favour yogurts with enhanced flavours
 - Graph 19: types of yogurt /yogurt drinks typically eaten, 2023
- Flavoured yogurts and fromage frais a family favourite
- Plain yogurts gain traction in light of ultra-processed food (UPF) concern
- Affluence restricting the ability to get creative with plain yogurts
 - Graph 20: types of yogurt/yogurt drinks consumed, by socio-economic group, 2023
- More prone to customising recipes in Rol
 - Graph 21: percentage typically eating yogurt/yogurt drinks on its own, 2023
- Appliance ownership skews towards younger age groups

Occasions for yogurt/yogurt drinks

- Breakfast is the main occasion , but there is room for growth
 - Graph 22: typical breakfast when eating eat home, 2022
- Spoonable yogurts consumed throughout the day
 - Graph 23: wWhen yogurt drinks/fermented milk drinks are typically eaten, 2023
 - Graph 24: when spoonable yogurt/fromage frais are typically eaten, 2023
- Thick texture essential to spoonable yogurt's success as a snack
 - Graph 25: what makes spoonable yogurt appealing as a snack, 2023
- Gender differences highlight the need for variation in product ranges
- Functionality as important as texture in Rol
- Guilt-free indulgence needed to unlock NI consumer base

Attitudes towards yogurt/yogurt drinks

- Attitudes towards yogurt & yogurt drinks in Rol
 - Graph 26: attitudes towards yogurt/yogurt drinks, 2023
- Attitudes towards yogurt & yogurt drinks in NI
 - Graph 27: attitudes towards yogurt/yogurt drinks, 2023

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- Consumers want to be informed on healthy choices
 - Graph 28: consumers who want it to be easier to identify healthy yogurts/yogurt drinks in the supermarket aisle, by age, 2023
- Help consumers trying to help themselves
- Opportunity within the wellness space
- Interest in returnable pots poised to grow in both markets
 - Graph 29: interest in yogurt/yogurt drinks in returnable pots, 2023
- Half of yogurt eaters are avoiding artificial sweeteners in Rol
- Social media influencing half aged under 34 in Rol

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Companies and brands

- Arla Foods – key facts
- Arla Foods – product portfolio
- Arla Foods – NPD
- Arla Foods – recent developments
- Clondeboye Estate – key facts
- Clondeboye Estate – product portfolio
- Clondeboye Estate – recent developments
- Danone UK and Ireland – key facts
- Danone UK and Ireland – product portfolio
- Danone UK and Ireland – NPD
- Danone UK and Ireland – recent developments
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- FAGE – NPD
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- Killowen Farm – key facts
- Killowen Farm – product portfolio
- Killowen Farm – recent developments
- Lactalis Nestlé Chilled Dairy – key facts

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- Lactalis Nestlé Chilled Dairy – product portfolio
- Lactalis Nestlé Chilled Dairy – recent developments
- Müller UK and Ireland – key facts
- Müller UK and Ireland – product portfolio
- Müller UK and Ireland – NPD
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- NOMADIC
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- NOMADIC – recent developments
- Yeo Valley – key facts
- Yeo Valley – product portfolio
- Yeo Valley – NPD
- Yeo Valley – recent developments
- Yoplait – key facts
- Yoplait – product portfolio
- Yoplait – NPD

Launch activity and innovation in yogurt & yogurt drinks

- Holistic health sees vitamins/minerals catch up to protein in plus claims
 - Graph 30: plus claims in yogurt and yogurt drinks (inc plant-based), 2019-23
- VMS market sees competition from food & drink fortification
- Fortification – Marks & Spencer X ZOE "Gut Shot" and more
- Anti-UPF movement sustains aversion to additives and preservatives
 - Graph 31: claims in yogurt and yogurt drinks (inc plant-based), 2020-23
- Consumers appreciate transparency
- Opportunity for natural and few ingredients
- Spotlight on UPF could threaten dairy alternatives
- Plant-based yogurts seeing growth in coconut-base over other alternatives
 - Graph 32: ingredients in plant-based yogurt launches, 2019-23
- Berries and fruit flavours lead launches, but consumer options limited
- More than half look for new varieties to try
- Europe offers new flavour potential for domestic brands
 - Graph 33: Emerging and established yogurt flavours, by launches in Europe, 2021-23
- Unique flavours exhibiting growth momentum
- Unguilty pleasures
- Müller taps into indulgence

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- Packaging formats see emergence of new convenience messaging
 - Graph 34: Convenience claims as a percentage of all yogurt/yogurt drink launches, 2019-23
- Yogurt drinks category poised to capitalise on fast-paced consumer lifestyles

APPENDIX

Supplementary data

- Market size and forecast: yogurt & yogurt drinks

Report scope and definitions

- Market definition
- Abbreviations and terms

Methodology

- Consumer research methodology

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