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The Yogurt Market and Yogurt Innovation: Greek Yogurt and Beyond

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Abstracts

The Yogurt Market and Yogurt Innovation: Greek Yogurt and Beyond - The yogurt market has undergone a sea change due to the Greek yogurt counter-revolution, which has yanked the category back to the future. Packaged Facts estimates the U.S. retail market for yogurt at $7.3 billion in 2012, up 6.6% over the previous year—with the Greek yogurt segment singlehandedly responsible for these respectable sales gains in a very large and mature product category. Greek yogurt surged from being from just a sliver of the yogurt market in 2007 to becoming the most important trend in the industry, albeit at the expense of non-Greek yogurt dollar and unit sales.

While Greek yogurt will continue to post gains and set the direction for the overall yogurt market, Packaged Facts does not believe it can keep up its amazing growth pace. As of early 2013, price competition has caused some areas of sales growth to slow, and major players to fight a zero sum game over market share.

Even so, many industry watchers hold that that yogurt, which is consumed at a relatively low rate per capita in the U.S., still has significant upside on these shores. With yogurt growing in consumption across various dayparts, and with the broad-ranging push for healthier eating and increased consumption of lean protein in the U.S., growth in the yogurt category is hardly on its last legs.

Moreover, Greek yogurt has emerged as a platform for innovation in other product categories, both perimeter and center store. Frozen yogurt has become a big early adopter, with a plethora of new Greek yogurt product introductions. And the yogurt trend has simultaneously been picked up by the foodservice industry, with overall penetration levels on restaurant menus nearing 18%, a 20% increase from five years ago. As part of this spill-over from retail, some yogurt makers have begun to pay more attention to

foodservice, with Chobani and Dannon opening up their own yogurt shops.

The Yogurt Market and Yogurt Innovation: Greek Yogurt and Beyond offers a comprehensive look at the market for yogurt and yogurt drinks across the U.S. retail spectrum, with discussion extending to the global competitive context.

Report Methodology

The information contained in this report was obtained from primary and secondary research. Primary research entailed consultations with yogurt market sources, on-site examination of retail venues, and fielding a proprietary Packaged Facts online consumer survey focusing on yogurt product shopper insights. Secondary research included extensive Internet canvassing and research- and data-gathering from relevant consumer business and trade publications; company reports including annual reports, press releases, and investor conference calls; company profiles in trade and consumer publications; government reports; and other food and beverage market reports by Packaged Facts.

Sales estimates are based on data from the above sources as well as SymphonyIRI data for mass-market channels (supermarkets, drugstores and mass merchandisers other than Walmart); SPINSscan and UNFI data for natural supermarkets; Datassential MenuTrends data for foodservice; published and estimated sales of major market participants; market size estimates from other sources, including those appearing in the trade press; the performance of relevant retail venues; and consumer usage rates for yogurt products; and new product introduction activity in the market.

Our consumer analysis draws primarily on two data sources. The first is national consumer survey data from Simmons' Fall 2012 National Consumer Study, which is based on 25,564 adult respondents surveyed from October 2011 through November 2012, as well as previous-year Simmons surveys. Through an ongoing program of telephone and booklet questionnaire surveys of a large probability sample of consumers who represent a statistically accurate cross-section of the U.S. adult population, Simmons is able construct detailed demographic profiles across various consumer product and service markets, including the yogurt market. The discussion of consumer patterns also draws on proprietary Packaged Facts online consumer surveys, including a February/March 2013 survey based on 2,000 U.S. adults who in aggregate are census representative on the primary demographic measure of age, gender, geographic region, race/ethnicity, and presence of children in the household.

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Contents

Hard to Recycle Packaging
Plant-Based Packaging
Product Attributes on the Lid
Cross-Category Applications: Yogurt Invading Other Categories
Granola Bars and Gelato
Frozen Novelties
Breakfast Cereal
Salad Dressing
Baby Food
Dips and Spreads
Smoothies
Cream Cheese
Greek Yogurt Butter
Asian Foods
Liqueur
Snacks
Skin care

Chapter 4 The U.S. Market: Marketer Profiles

Chobani, Inc.
Products
Marketing
The Dannon Company
Products
Marketing
FAGE USA
Products
Marketing
The Hain Celestial Group
Products
Marketing
Johanna Foods
Products
Marketing
Stonyfield Farm Inc.
Products
Marketing
Sun Valley Dairy Inc.

Table 6-22 Demographics of Adult Organic Yogurt Consumers, 2012 (Index)

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