

The Yogurt Market and Yogurt Innovation: Greek Yogurt and Beyond

<https://marketpublishers.com/r/YC03D7417BAEN.html>

Date: March 2013

Pages: 192

Price: US\$ 5,000.00 (Single User License)

ID: YC03D7417BAEN

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 to 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.

Contents

Chapter 1 Executive Summary

Scope of Report

Report Methodology

Size and Growth of the Market

Yogurt Sales Bloom, Thanks to Greek

Table 1-1 U.S. Sales of Yogurt, 2008-2012 (in millions of dollars)

More Yogurt Sales on the Horizon

Table 1-2 Projected U.S. Sales of Yogurt, 2013-2017 (in millions of dollars)

Majority of Yogurt Sales in Grocery Channel

Table 1-3 Share of U.S. Sales of Yogurt by Channel, 2012 (percent)

Yogurt is Bought In a Variety of Retail Outlets

Table 1-4 Consumers' Response to Question about Yogurt Purchases: Where do you usually buy yogurt? (Multiple answers allowed)

SymphonyIRI-tracked Sales Show Solid Dollar Growth

Table 1-5 IRI-Tracked Sales of Yogurt & Yogurt Drinks, 2012

Greek Yogurt Driving Dollar Growth, but at a Cost

Greek Stars in Natural Foods and Specialty Gourmet Channels

Yogurt Maintains a Top 10 position in Food

Table 1-6 Biggest Categories by Dollar Sales, 2012

Market Share Concentrated in Mass Channels, More Spread Out Elsewhere

Private Label An Important Yogurt Player

Greek Yogurt Spreads Wings

Yogurt Growing on Foodservice Menus

Yogurt Introduce a Plethora of New Products

Packaging Trends: Convenient and Green Packaging

Yogurt Invades Other Categories

The U.S. Competitive Landscape

The Global Landscape

Yogurt's Penetration Holds Steady

Table 1-7 Yogurt Usage, By Gender (percent)

Chapter 2 Market Trends

Yogurt Sales Rise to \$7.3 billion

Table 2-1 U.S. Sales of Yogurt, 2008-2012 (in millions of dollars)

A Multi-Channel Champion

Table 2-2 Share of U.S. Sales of Yogurt by Channel, 2012 (percent)
Location Preferences: Grocery Stores On Top, But Other Outlets Popular
Table 2-3 Consumers' Response to Question about Yogurt Purchases:
Where do you usually buy yogurt? (Multiple answers allowed)
SymphonyIRI-tracked Sales Show Solid Dollar Growth
Table 2-4 IRI-Tracked Sales of Yogurt & Yogurt Drinks, 2012
Other Yogurt Categories See Healthy Returns
Table 2-5 IRI-Tracked Sales of Other Yogurt Products, 2012
Greek Yogurt Fueling Dollar Growth, but Cannibalizing Unit Sales
Table 2-6 Greek Yogurt Dollar Sales and Share, 2011-2012
Table 2-7 Greek Yogurt Unit Sales and Share, 2011-2012
Greek Gaining Even More Share in 2013
Natural Foods Channel Sees Strong Growth in All Categories
Table 2-8 Sales of Yogurt in Natural Foods Channel, 2011-2012
Specialty Gourmet Channel Sees Sales Increases
Table 2-9 Sales of Yogurt in Specialty Gourmet Channel, 2011-2012
Greek Yogurt Is Tops, According to UNFI
Table 2-10 Subcategory Share in Natural Channel, Q4 2012 vs. Q4 2011
Refrigerated Yogurt Competes Across Supermarket Aisles
Table 2-11 Biggest Categories by Dollar Sales, 2012
Table 2-12 Biggest Categories by Unit Sales, 2012
Refrigerated Yogurt Among Fastest Growing Billion-Dollar Categories
Table 2-13 Fastest Growing Billion Dollar Categories, 2012
Competitive Landscape
Market Share Concentrated Among a Select Few
Table 2-14 Top Marketers Of Yogurt and Yogurt Drinks at Food, Drug and Mass
Merchandisers, 2012
Mainstream Channels: Yoplait Edges Dannon In Refrigerated Yogurt
Table 2-15 Top Marketers of Refrigerated Yogurt, 2012
Table 2-16 Fast Growing Brands of Refrigerated Yogurt, 2012
Natural Food Channels: Foreign and Specialty Brands Populate the Top Spots
Table 2-17 Top 20 Yogurt Brands in Mainstream vs. Natural Channels, 2012
Table 2-18 Brand Share in Natural Channel, Q4 2012 vs. Q4 2011
FAGE, Large Sizes Prevalent Among Top Natural Food SKUs
Table 2-19 Top 20 SKUs in the Natural Channel, Q4 2012 vs. Q4 2011
Table 2-20 Top 10 New Products in the Natural Channel, Q4 2012
Danone Leads In Yogurt Drinks
Table 2-21 Top Marketers of Yogurt Drinks, 2012
Table 2-22 Fast Growing Yogurt Drinks, 2012

Chobani Rules Greek Yogurt

Table 2-23 Greek Yogurt by Dollar Share, 2012

Table 2-24 Greek Yogurt by Unit Share, 2012

2013: Chobani, FAGE Seen Slipping; Dannon, Yoplait Seen Rising

Top Marketers of Frozen Yogurt Only Three Big Snack Size Competitors

Table 2-25 Top Marketers of Frozen Yogurt, 2012

Table 2-26 Fast Growing Frozen Yogurt Brands, 2012

Private Label Outpaces Its Overall Categories in All But Yogurt Drinks

Table 2-27 Top Marketers of Frozen Yogurt, 2012

Looking Ahead

More Yogurt Sales on the Horizon

Table 2-28 Projected U.S. Sales of Yogurt, 2013-2017 (in millions of dollars)

Chapter 3 Greek Yogurt and Beyond Greek Yogurt and Beyond: Market Innovation and Cross-Category Applications

As Greek Yogurt Grows, Other Categories Impacted

Greek Invades Frozen Yogurt

Private Label Keeps Up With the Joneses

Table 3-1 Food Products Purchased by Grocery Shoppers on Most Recent Grocery Shopping Trip with the Highest and Lowest Likelihood of Being National/Name Brands, 2011 (percent of grocery shoppers)

Yogurt's Prevalence Grows in Foodservice

Table 3-2 Yogurt on the Menu: Restaurant Penetration, by Segment, 2012

Table 3-3 Yogurt on the Menu: Restaurant Penetration Growth, 2008-2012

Table 3-4 Yogurt on the Menu: Penetration, by Restaurant Cuisine Specialty, 2012

Table 3-5 Greek Yogurt on the Menu: Penetration, by Restaurant Cuisine Specialty, 2012

Table 3-6 Greek Yogurt on the Menu: Penetration, by Restaurant Cuisine Specialty, 2012

Table 3-7 Yogurt on the Menu: Distribution by Menu, 2012

Table 3-8 Greek Yogurt on the Menu: Distribution by Menu, 2012

Yogurt Makers Open Shop

Yogurt Makes Regular Appearances on SymphonyIRI's Pacesetters List

Yogurt Innovators Recognized

Greek Leads New Yogurt Products

Packaging Trends: Convenient and Green Packaging Abound

Easier Snacking

Making Healthy Eating Easier

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.

Products
Marketing
YoCrunch
Products
Marketing
General Mills (Yoplait USA Inc.)
Products
Marketing

Chapter 5 The Global Market, The Global Market: Overview and New Products

Yogurt Sales At \$69 Billion Worldwide

Table 5-1 Share of Yogurt Sales by Region, 2012 (percent)

New Products and Trends Around the World

Global Marketer Profiles

Alpina Productos Alimenticios SA

Arla Foods

Danone

Ehrmann AG

Emmi

FAGE International S.A.

Fonterra Co-operative Group

Groupe Lactalis

Meiji Holdings Co., Ltd.

Unternehmensgruppe Theo Müller

Nestlé SA

PepsiCo

Royal FrieslandCampina

Yoplait S.A.S

Yakult Honsha Co Ltd

Zott GmbH & Co KG

Chapter 6 The Consumer

Note on Simmons and Packaged Facts Surveys

Yogurt Percentage Usage Holds Steady; Per Capita Consumption Increasing

Table 6-1 Yogurt Usage, 2005-2012 (Number in Thousands & Percent)

Do Women Really Like Yogurt More?

Table 6-2 Yogurt Usage, By Gender (percent)

Brogurt: What About Men?

Location Preferences: Grocery Stores Dominate

Table 6-3 Consumers' Response to Question About Yogurt Purchases: Where do you usually buy yogurt? (multiple answers allowed)

Daypart Preferences: Breakfast, Of Course

Table 6-4 Consumers' Response to Question About Yogurt Consumption: What time of day do you usually consume yogurt products? (multiple answers allowed)

How Fat Do You Like It?

Table 6-5 Types of Yogurt Consumed, 2005-2012 (Number in Thousands & Percent)

Table 6-6 Demographics of Adult Yogurt Consumers by Type Consumed, 2012 (Index)
Slurp or Spoon?

Table 6-7 Forms of Yogurt Consumed, 2012 (Percentage of Yogurt Users)

Table 6-8 Demographics of Adult Yogurt Consumers by Form Consumed, 2012 (Index)
Fruit, Flavored, Crunchies or Plain?

Table 6-9 Kinds of Yogurt Consumed, 2005-2012 (Number in Thousands & Percent)

Table 6-10 Types of yogurt purchased, Non-Greek vs Greek

Table 6-11 Demographics of Adult Yogurt Consumers by Kind Consumed, 2012 (Index)

Gimme the Greek

Table 6-12 Greek Yogurt Usage, Overall and By Gender (percent)

Table 6-13 Consumers Who've Bought Greek Yogurt in Last 30 Days: What are the main reasons you buy Greek yogurt over other kinds of yogurt? (percent)

Yogurt from Other Countries

Table 6-14 Types of yogurt or cultured dairy products from other countries bought within the last 30 days (percent)

Usage and Appeal of Cross-Category Yogurt Applications

Table 6-15 Percentage of customers who have bought the following yogurt-flavored or yogurt-containing products and respective appeal

Brand Preferences

Table 6-16 Yogurt Brand Consumption Trends, 2005-2012 (percent)

Consumer Demographics

Table 6-17 Demographics of Adult Yogurt Consumers by Brand, 2012 (Index)

Consumer Psychographics

Table 6-18 Psychographics of Adult Yogurt Consumers by Brand- Attitudes About Diet & Health, 2012 (Index)

Table 6-19 Psychographics of Adult Yogurt Consumers by Brand- Attitudes About Food, 2012 (Index)

Table 6-20 Psychographics of Adult Yogurt Consumers by Brand- Attitudes About Shopping, 2012 (Index)

Organic Yogurt

Table 6-21 Organic Product Usage, 2012

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

I would like to order

Product name: The Yogurt Market and Yogurt Innovation: Greek Yogurt and Beyond

Product link: <https://marketpublishers.com/r/YC03D7417BAEN.html>

Price: US\$ 5,000.00 (Single User License / Electronic Delivery)

If you want to order Corporate License or Hard Copy, please, contact our Customer Service:

info@marketpublishers.com

Payment

To pay by Credit Card (Visa, MasterCard, American Express, PayPal), please, click button on product page <https://marketpublishers.com/r/YC03D7417BAEN.html>

To pay by Wire Transfer, please, fill in your contact details in the form below:

First name:
Last name:
Email:
Company:
Address:
City:
Zip code:
Country:
Tel:
Fax:
Your message:

****All fields are required**

Customer signature _____

Please, note that by ordering from marketpublishers.com you are agreeing to our Terms & Conditions at <https://marketpublishers.com/docs/terms.html>

To place an order via fax simply print this form, fill in the information below and fax the completed form to +44 20 7900 3970