

# **Dairy Products and Alternatives in Ireland**

September 2023

**Table of Contents** 

## Dairy Products and Alternatives in Ireland

## EXECUTIVE SUMMARY

Dairy products and alternatives in 2023: The big picture Key trends in 2023 Competitive Landscape Channel developments What next for dairy products and alternatives?

## MARKET DATA

Table 1 - Sales of Dairy Products and Alternatives by Category: Value 2018-2023

Table 2 - Sales of Dairy Products and Alternatives by Category: % Value Growth 2018-2023

Table 3 - NBO Company Shares of Dairy Products and Alternatives: % Value 2019-2023

Table 4 - LBN Brand Shares of Dairy Products and Alternatives: % Value 2020-2023

Table 5 - Penetration of Private Label by Category: % Value 2018-2023

Table 6 - Distribution of Dairy Products and Alternatives by Format: % Value 2018-2023

 Table 7 - Forecast Sales of Dairy Products and Alternatives by Category: Value 2023-2028

Table 8 - Forecast Sales of Dairy Products and Alternatives by Category: % Value Growth 2023-2028

#### DISCLAIMER

SOURCES

Summary 1 - Research Sources

## Baby Food in Ireland

## **KEY DATA FINDINGS**

#### 2023 DEVELOPMENTS

Clean label and functionality to the fore as health and wellness holds sway Declining birth rate continues to have a negative impact on demand for baby food Limited innovation as low profitability discourages investment in new products

#### PROSPECTS AND OPPORTUNITIES

Rising awareness of breastfeeding to put further pressure on demand for baby food High levels of concentration as a handful of major players set to dominate sales New products unlikely to perform spectacularly as consumers stick to the familiar

#### CATEGORY DATA

Table 9 - Sales of Baby Food by Category: Volume 2018-2023
Table 10 - Sales of Baby Food by Category: Value 2018-2023
Table 11 - Sales of Baby Food by Category: % Volume Growth 2018-2023
Table 12 - Sales of Baby Food by Category: % Value Growth 2018-2023
Table 13 - Sales of Growing-Up Milk Formula by Age: % Value 2018-2023
Table 14 - NBO Company Shares of Baby Food: % Value 2019-2023
Table 15 - LBN Brand Shares of Baby Food: % Value 2020-2023
Table 16 - Distribution of Baby Food by Format: % Value 2018-2023
Table 17 - Forecast Sales of Baby Food by Category: Volume 2023-2028
Table 18 - Forecast Sales of Baby Food by Category: % Volume Growth 2023-2028
Table 19 - Forecast Sales of Baby Food by Category: % Volume Growth 2023-2028
Table 20 - Forecast Sales of Baby Food by Category: % Value Growth 2023-2028

## Butter and Spreads in Ireland

**KEY DATA FINDINGS** 

#### 2023 DEVELOPMENTS

The average unit price of butter stabilises somewhat in 2023 after steep rises in 2022 Another poor performance for cooking fats as consumers prefer butter The rising popularity of slow cooking strengthens demand for butter

## PROSPECTS AND OPPORTUNITIES

Further poor performances lie ahead for cooking fats and margarine and spreads Kerry Foods Ltd unlikely to face any serious challenges to its leadership in the category Focus on innovation as category players look to attract the attention of consumers

## CATEGORY DATA

Table 21 - Sales of Butter and Spreads by Category: Volume 2018-2023
Table 22 - Sales of Butter and Spreads by Category: Value 2018-2023
Table 23 - Sales of Butter and Spreads by Category: % Volume Growth 2018-2023
Table 24 - Sales of Butter and Spreads by Category: % Value Growth 2018-2023
Table 25 - NBO Company Shares of Butter and Spreads: % Value 2019-2023
Table 26 - LBN Brand Shares of Butter and Spreads by Format: % Value 2018-2023
Table 27 - Distribution of Butter and Spreads by Category: Volume 2023-2028
Table 28 - Forecast Sales of Butter and Spreads by Category: Value 2023-2028
Table 30 - Forecast Sales of Butter and Spreads by Category: % Volume Growth 2023-2028
Table 31 - Forecast Sales of Butter and Spreads by Category: % Value Growth 2023-2028

## Cheese in Ireland

## **KEY DATA FINDINGS**

## 2023 DEVELOPMENTS

Premium brands with a health and wellness positioning gain ground A steady performance for private label as consumers continue to seek value for money Packaged hard cheese remains more popular than unpackaged hard cheese

#### PROSPECTS AND OPPORTUNITIES

Cheese set to remain a fragmented category without a strong leader New consumption occasion for cheese to be pushed by major players, including Lactalis Boom in demand for preparing meals from scratch at home to support cheese sales

#### CATEGORY DATA

Table 32 - Sales of Cheese by Category: Volume 2018-2023Table 33 - Sales of Cheese by Category: Value 2018-2023Table 34 - Sales of Cheese by Category: % Volume Growth 2018-2023Table 35 - Sales of Cheese by Category: % Value Growth 2018-2023Table 36 - Sales of Spreadable Processed Cheese by Type: % Value 2018-2023Table 37 - Sales of Soft Cheese by Type: % Value 2018-2023Table 38 - Sales of Hard Cheese by Type: % Value 2018-2023Table 39 - NBO Company Shares of Cheese: % Value 2019-2023Table 40 - LBN Brand Shares of Cheese: % Value 2018-2023Table 41 - Distribution of Cheese by Category: Volume 2023-2028Table 43 - Forecast Sales of Cheese by Category: Value 2023-2028Table 43 - Forecast Sales of Cheese by Category: % Volume Growth 2023-2028Table 44 - Forecast Sales of Cheese by Category: % Volume Growth 2023-2028Table 45 - Forecast Sales of Cheese by Category: % Value Growth 2023-2028

Drinking Milk Products in Ireland

## **KEY DATA FINDINGS**

#### 2023 DEVELOPMENTS

Decreasing raw material prices ease upwards pressure on unit prices Irish dairy herds threatened by EU agricultural emissions target obligations Lack of innovation within drinking milk products as consumers demand basic essentials

## PROSPECTS AND OPPORTUNITIES

Rugby star Ringrose partners with NDC for milk promotion during Rugby World Cup Highlighting milk's high protein content a crucial health and wellness claim Glanbia to maintain the lead despite competition from private label and smaller brands

## CATEGORY DATA

Table 46 - Sales of Drinking Milk Products by Category: Volume 2018-2023
Table 47 - Sales of Drinking Milk Products by Category: Value 2018-2023
Table 48 - Sales of Drinking Milk Products by Category: % Volume Growth 2018-2023
Table 49 - Sales of Drinking Milk Products by Category: % Value Growth 2018-2023
Table 50 - NBO Company Shares of Drinking Milk Products: % Value 2019-2023
Table 51 - LBN Brand Shares of Drinking Milk Products by Format: % Value 2020-2023
Table 52 - Distribution of Drinking Milk Products Products by Category: Volume 2023-2028
Table 54 - Forecast Sales of Drinking Milk Products Products by Category: Value 2023-2028
Table 55 - Forecast Sales of Drinking Milk Products Products by Category: % Volume Growth 2023-2028
Table 56 - Forecast Sales of Drinking Milk Products Products by Category: % Value Crowth 2023-2028

## Yoghurt and Sour Milk Products in Ireland

#### **KEY DATA FINDINGS**

#### 2023 DEVELOPMENTS

Healthier products come to the fore as Irish consumers focus more on nutrition Sustained popularity of cultured drinking yoghurt for boosting immune health Rising demand for high protein yoghurt as consumers demand better nutrition

### PROSPECTS AND OPPORTUNITIES

Consumers set to continue embracing sour milk products for their health benefits Leading player Danone set face stiffer competition from private label and rival brands Category players need to respond to the pressure coming from plant-based yoghurt

## CATEGORY DATA

Table 57 - Sales of Yoghurt and Sour Milk Products by Category: Volume 2018-2023
Table 58 - Sales of Yoghurt and Sour Milk Products by Category: Value 2018-2023
Table 59 - Sales of Yoghurt and Sour Milk Products by Category: % Volume Growth 2018-2023
Table 60 - Sales of Yoghurt and Sour Milk Products by Category: % Value Growth 2018-2023
Table 61 - Sales of Flavoured Yoghurt by Flavour: Rankings 2018-2023
Table 62 - NBO Company Shares of Yoghurt and Sour Milk Products: % Value 2019-2023
Table 63 - LBN Brand Shares of Yoghurt and Sour Milk Products by Format: % Value 2020-2023
Table 64 - Distribution of Yoghurt and Sour Milk Products by Category: Volume 2023-2028
Table 65 - Forecast Sales of Yoghurt and Sour Milk Products by Category: Value 2023-2028
Table 66 - Forecast Sales of Yoghurt and Sour Milk Products by Category: Value 2023-2028
Table 67 - Forecast Sales of Yoghurt and Sour Milk Products by Category: Wolume Growth 2023-2028
Table 68 - Forecast Sales of Yoghurt and Sour Milk Products by Category: % Volume Growth 2023-2028

## Other Dairy in Ireland

## **KEY DATA FINDINGS**

## 2023 DEVELOPMENTS

Fromage frais and quark and coffee whiteners lose ground Chilled dairy desserts in decline despite rising demand for indulgence Cream benefits from consumers embracing home-made meals and desserts

## PROSPECTS AND OPPORTUNITIES

Higher levels of specialisation set to continue fostering higher levels of fragmentation Discounters, convenience stores to gain further traction in other dairy distribution Merging indulgence and health and wellness to form the core of future innovation

#### CATEGORY DATA

Table 69 - Sales of Other Dairy by Category: Volume 2018-2023
Table 70 - Sales of Other Dairy by Category: Value 2018-2023
Table 71 - Sales of Other Dairy by Category: % Volume Growth 2018-2023
Table 72 - Sales of Other Dairy by Category: % Value Growth 2018-2023
Table 73 - Sales of Cream by Type: % Value 2018-2023
Table 74 - NBO Company Shares of Other Dairy: % Value 2019-2023
Table 75 - LBN Brand Shares of Other Dairy: % Value 2020-2023
Table 76 - Distribution of Other Dairy by Format: % Value 2018-2023
Table 77 - Forecast Sales of Other Dairy by Category: Volume 2023-2028
Table 78 - Forecast Sales of Other Dairy by Category: % Volume Growth 2023-2028
Table 80 - Forecast Sales of Other Dairy by Category: % Value Growth 2023-2028

#### Plant-Based Dairy in Ireland

## **KEY DATA FINDINGS**

#### 2023 DEVELOPMENTS

Positive sales growth as the popularity of plant-based dairy continues to spread Importance of sustainability for innovation unlikely to diminish substantially The internet and social media continue to fuel awareness of plant-based lifestyles

#### PROSPECTS AND OPPORTUNITIES

Still huge room for expansion of demand despite significant sales growth recently Innovation and marketing to underpin rising interest in plant-based nutrition High development costs set to continue undermining growth in plant-based dairy

## CATEGORY DATA

Table 81 - Sales of Plant-Based Dairy by Category: Value 2018-2023Table 82 - Sales of Plant-Based Dairy by Category: % Value Growth 2018-2023Table 83 - Sales of Other Plant-Based Milk by Type: % Value 2020-2023Table 84 - NBO Company Shares of Plant-Based Dairy: % Value 2019-2023Table 85 - LBN Brand Shares of Plant-Based Dairy: % Value 2020-2023Table 86 - Distribution of Plant-Based Dairy by Format: % Value 2018-2023Table 87 - Forecast Sales of Plant-Based Dairy by Category: Value 2023-2028Table 88 - Forecast Sales of Plant-Based Dairy by Category: % Value 2023-2028

## About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- Strategy Briefings: Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- Company Profiles: Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- Country Reports: For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/dairy-products-and-alternatives-inireland/report.