

Dairy Products and Alternatives in Austria

September 2023

Table of Contents

Dairy Products and Alternatives in Austria

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 Austria

KEY DATA FINDINGS

2023 DEVELOPMENTS

Glass jars and pouches boost sales of Prepared Baby Food, valued for convenience

Baby food sees sales growth as parents reach for convenient snack options

PROSPECTS AND OPPORTUNITIES

Baby food posts solid growth, boosted by liquid milk formula

Milk formula remains competitive as players launch plant-based options

Demand for on-the-go consumption drives sales of other baby food

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: Value 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 Austria

KEY DATA FINDINGS

2023 DEVELOPMENTS

Current retail value sales fall as prices decline with deals and discounts available
Retail volume sales increase as Margarine benefits from affordable price points
Upfield Austria continues to lead, offering consumers Plant-Based options

PROSPECTS AND OPPORTUNITIES

Butter accounts for the bulk of sales, while Margarine benefits from lower prices
Private label continues to have a solid performance in Butter and Spreads
Vegan Margarine to garner more interest across the forecast period

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: % Value 2020-2023
Table 27 - Distribution of Butter and Spreads by Format: % Value 2018-2023
Table 28 - Forecast Sales of Butter and Spreads by Category: Volume 2023-2028
Table 29 - 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 Austria

KEY DATA FINDINGS

2023 DEVELOPMENTS

Hard cheese remains popular, while soft cheese sees a boost in retail value growth
Local player Berglandmilch continues to lead, focusing on sustainable attributes
Private label players see sales rise as disposable incomes reduce

PROSPECTS AND OPPORTUNITIES

Steady growth set for the forecast period, driven by packaged hard cheese
Regional players promote the local aspect of their cheese to drive sales
Sustainable ingredients and plant-based competition are key future trends

CATEGORY DATA

Table 32 - Sales of Cheese by Category: Volume 2018-2023
Table 33 - Sales of Cheese by Category: Value 2018-2023
Table 34 - Sales of Cheese by Category: % Volume Growth 2018-2023
Table 35 - Sales of Cheese by Category: % Value Growth 2018-2023
Table 36 - Sales of Spreadable Processed Cheese by Type: % Value 2018-2023
Table 37 - Sales of Soft Cheese by Type: % Value 2018-2023
Table 38 - Sales of Hard Cheese by Type: % Value 2018-2023
Table 39 - NBO Company Shares of Cheese: % Value 2019-2023
Table 40 - LBN Brand Shares of Cheese: % Value 2020-2023
Table 41 - Distribution of Cheese by Format: % Value 2018-2023
Table 42 - Forecast Sales of Cheese by Category: Volume 2023-2028
Table 43 - Forecast Sales of Cheese by Category: Value 2023-2028
Table 44 - Forecast Sales of Cheese by Category: % Volume Growth 2023-2028
Table 45 - Forecast Sales of Cheese by Category: % Value Growth 2023-2028

Drinking Milk Products in Austria

KEY DATA FINDINGS

2023 DEVELOPMENTS

Flavoured milk drinks benefit from on-the-go consumption, with added-value driving sales
Cow's milk leads sales; however, plant-based milk is a growing threat
Berglandmilch retains its lead while focusing on sustainable goals

PROSPECTS AND OPPORTUNITIES

Flavoured milk drinks remain popular, with added protein boosting sales
Longer life products offer convenience and price savings, driving demand
Private label offerings will account for the majority of shares in drinking milk

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: % Value 2020-2023
Table 52 - Distribution of Drinking Milk Products by Format: % Value 2018-2023
Table 53 - Forecast Sales 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 Growth 2023-2028

Yoghurt and Sour Milk Products in Austria

KEY DATA FINDINGS

2023 DEVELOPMENTS

Protein-enriched options boost sales, aligning with rising health trends
Healthier, sustainable products are in demand
Local player Nöm maintains its lead, offering consumers innovative products

PROSPECTS AND OPPORTUNITIES

Yoghurt benefits from its alignment with health and wellness trends
Players focus on sustainable packaging to respond to the growing demand
Health and wellness set to shape product innovation across the forecast period

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: % Value 2020-2023
Table 64 - Distribution of Yoghurt and Sour Milk Products by Format: % Value 2018-2023
Table 65 - Forecast Sales of Yoghurt and Sour Milk Products by Category: Volume 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: % Volume Growth 2023-2028
Table 68 - Forecast Sales of Yoghurt and Sour Milk Products by Category: % Value Growth 2023-2028

Other Dairy in Austria

KEY DATA FINDINGS

2023 DEVELOPMENTS

Private label grows in popularity as disposable budgets reduce
Protein-enriched products grow in popularity within fromage frais and quark
Danone retains its lead in 2023, with a long-standing tradition in the country

PROSPECTS AND OPPORTUNITIES

Condensed and evaporated milk suffers from an old-fashioned image
Dairy based cream faces competition from plant-based options
Multinationals are set to maintain the lead, focusing on product 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: Value 2023-2028
Table 79 - 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 Austria

KEY DATA FINDINGS

2023 DEVELOPMENTS

Plant-based dairy continues to grow, with sales boosted by new product launches
Other plant-based milk records strong growth, with oat milk driving sales
Alpro GmbH retains its lead, offering the favoured brand in soy Milk

PROSPECTS AND OPPORTUNITIES

Rising interest in sustainability boosts sales of plant-based dairy
Plant-based cheese records high levels of growth, driven by new product launches
Private label set to gain ground, benefiting from attractive price points

CATEGORY DATA

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

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-in-austria/report.