

## **Dairy Products and Alternatives in New Zealand**

Market Direction | 2023-09-26 | 70 pages | Euromonitor

### **AVAILABLE LICENSES:**

- Single User Licence €1750.00
- Multiple User License (1 Site) €3500.00
- Multiple User License (Global) €5250.00

### **Report description:**

The dairy industry has faced some difficult challenges and obstacles during 2023, with the headlines being inflation and supply issues. Global inflation has been at high levels, and although the Australia/New Zealand region had slightly lower inflation compared with other parts of the world, it was still substantial. The situation was worse for the dairy industry, as the inflation rate for dairy products was around double that of the national inflation rate. The rise in prices is set to result i...

Euromonitor International's Dairy Products and Alternatives in New Zealand report offers in-depth knowledge of the market at a national level, providing local insight and understanding unavailable elsewhere. In addition to the latest retail sales data 2018-2022, it identifies the leading companies, brands and retail outlets, and assesses the key trends and demographic shifts behind consumer demand and sales growth. How key trends such as health and wellness, sustainability and recovery from the pandemic are shaping the market in <|Year|> directly informs our forecasts to 2027, clearly indicating how the market is expected to change.

Product coverage: Baby Food, Dairy, Plant-based Dairy.

Data coverage: market sizes (historic and forecasts), company shares, brand shares and distribution data.

### **Why buy this report?**

- \* Get a detailed picture of the Dairy Products and Alternatives market;
- \* Pinpoint growth sectors and identify factors driving change;
- \* Understand the competitive environment, the market's major players and leading brands;
- \* Use five-year forecasts to assess how the market is predicted to develop.

Euromonitor International has over 40 years' experience of publishing market research reports, business reference books and online information systems. With offices in London, Chicago, Singapore, Shanghai, Vilnius, Dubai, Cape Town, Santiago, Sydney, Tokyo and Bangalore and a network of over 800 analysts worldwide, Euromonitor International has a unique capability to develop

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

reliable information resources to help drive informed strategic planning.

## **Table of Contents:**

Dairy Products and Alternatives in New Zealand

Euromonitor International

September 2023

List Of Contents And Tables

### **DAIRY PRODUCTS AND ALTERNATIVES IN NEW ZEALAND**

#### **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 NEW ZEALAND**

#### **KEY DATA FINDINGS**

#### **2023 DEVELOPMENTS**

Post-pandemic return to normality a positive factor for baby food

Watties subscription service aims to add a twist to baby food

High levels of inflation cause parents to struggle, but they still purchase baby food

#### **PROSPECTS AND OPPORTUNITIES**

Keeping in line with health standards will be key for baby food

Consumer demand for plant-based alternatives growing every year

Declining birth rate dampens forecast for 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

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

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 NEW ZEALAND

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Margarine shows steady growth, but is still dwarfed by butter

Return to dining out boosts foodservice sales of butter and spreads

Supermarket private label butter leads as consumers compromise for cooking

### PROSPECTS AND OPPORTUNITIES

Sustainability concerns and their impact on consumer choice

The Warehouse is attempting to make an impact in butter and spreads

Opportunity for private label to grow in margarine and spreads

### 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 NEW ZEALAND

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Pressures of cost of living and inflation constrain volume growth of cheese

Packaged hard cheese dominates, as consumers stick to familiar products

Incumbent cheese makers make it difficult for newcomers

### PROSPECTS AND OPPORTUNITIES

Rise of plant-based diets poses a threat to growth of cheese

Brand name and familiarity drive consumers' choice of cheese

Foodservice sales of cheese expected to see consistent growth

### 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

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

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 NEW ZEALAND

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Fonterra and Nestle are developing New Zealand's first carbon-neutral dairy farm

Sanitarium's Up&Go brand maintains a strong performance

Supply issues and inflation drive up prices and drive volume decline

#### PROSPECTS AND OPPORTUNITIES

Dairy industry must adapt as consumers demand ethical practices

Fonterra lowering farm gate prices and expecting a decline in milk collection

No added sugar will be key for growth in flavoured milk drinks

#### 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 NEW ZEALAND

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Chobani finally enters the New Zealand market, after seeing success in Australia

Drinking yoghurt is seeing fierce competition

Flavoured yoghurt far ahead of other yoghurt categories

#### PROSPECTS AND OPPORTUNITIES

Opportunity for growth in drinking yoghurt

Yoghurt to be positioned as a health food, with low fat and low sugar options

Innovating through product design and meeting specific needs

#### 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

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

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 NEW ZEALAND

##### KEY DATA FINDINGS

##### 2023 DEVELOPMENTS

Coffee whiteners fall out of favour with consumers, as the quality of household coffee rises

Nestle continues to dominate condensed milk

Cooking culture and versatility keep cream relevant in the market

##### PROSPECTS AND OPPORTUNITIES

Growth of chilled dairy desserts under threat from other snacks and treats

Other dairy expected to be fairly static in retail volume terms, with few openings for disruptors

Development of plant-based options could dampen growth in other dairy

##### 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 NEW ZEALAND

##### KEY DATA FINDINGS

##### 2023 DEVELOPMENTS

Strong growth for private label in the plant-based space

Oat milk consolidates its position and is on track to become the top plant-based milk

Plant-based dairy growing steadily in foodservice

##### PROSPECTS AND OPPORTUNITIES

Eco-friendly consumer choices a positive sign for plant-based alternatives

New product development will be key to maintain momentum for plant-based dairy

New Zealand start-up Miruku innovating in the plant protein space

##### 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

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

## Dairy Products and Alternatives in New Zealand

Market Direction | 2023-09-26 | 70 pages | Euromonitor

To place an Order with Scotts International:

- ☐ - Print this form
- ☐ - Complete the relevant blank fields and sign
- ☐ - Send as a scanned email to support@scotts-international.com

### ORDER FORM:

Select license	License	Price
	Single User Licence	€1750.00
	Multiple User License (1 Site)	€3500.00
	Multiple User License (Global)	€5250.00
		VAT
		Total

\*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

\*\* VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*	<input type="text"/>	Phone*	<input type="text"/>
First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Job title*	<input type="text"/>		
Company Name*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>
Address*	<input type="text"/>	City*	<input type="text"/>
Zip Code*	<input type="text"/>	Country*	<input type="text"/>
		Date	<input type="text" value="2025-06-24"/>
		Signature	<input type="text"/>

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com