Europe Non-dairy Yogurt - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2017 - 2029

Market Report | 2024-02-17 | 183 pages | Mordor Intelligence

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Report description:

The Europe Non-dairy Yogurt Market size is estimated at USD 1.36 billion in 2024, and is expected to reach USD 2.71 billion by 2029, growing at a CAGR of 14.79% during the forecast period (2024-2029).

Rise in modern grocery retailing including hypermarkets and online stores fuels the sales through off-trade channels

- The off-trade segment dominates the distribution channels of the European non-dairy yogurt market. This is primarily driven by the high sales generated by supermarkets and hypermarkets. The proximity element of these channels gives them an added benefit by influencing the consumer's choice among the wide range of products, including non-dairy yogurt, in the market. In 2022, supermarkets and hypermarkets accounted for a major share of 63.5% by value. These retail channels have a strong position due to the wide selection of brands offered, considerable shelf space, and frequent price promotions. The omnichannel approach adopted by major retailers worldwide drives the non-dairy yogurt market.
- The online channel sub-segment is growing rapidly. It is anticipated to register a CAGR of 25.8% during the forecast period, and it is expected to grow by more than 130% in 2028 compared to 2023. The growth of e-commerce has enabled companies to access a larger target market for non-dairy yogurt and effectively serve customer needs. In 2021, among all European countries, Germany had the most significant e-commerce consumer base, with 62.1 million online shoppers, followed by the United Kingdom and France, with 50 million and 44.7 million individuals, respectively.
- In terms of country, the United Kingdom is the leading country, occupying a significant share of 19.68% in 2022. This is mainly due to the rising demand for a vegan diet and products, which led to the sales of plant-based yogurt in retail channels. In 2021, nearly 20% of consumers bought more plant-based yogurt. Between January 2020 and 2021, UK online food delivery company, Deliveroo recorded that its vegan takeaway orders shot up by 163%.

United Kingdom plays a major role in the consumption of non-dairy yogurt in the region

- The demand for non-dairy yogurt in Europe is anticipated to grow by 61.4% in 2025 compared to 2022. Consumers are drawn toward the health and sustainability benefits of plant-based yogurt.
- Manufacturers of plant-based yogurt are majorly focused on product innovations by launching a variety of flavors, which is increasing the demand for plant-based yogurt in Europe. As of 2021, Western Europe was the most dynamic region globally in terms of launches. It witnessed the launch of more than 360 plant-based yogurts, accounting for 66% of all launches globally.
- By country, the United Kingdom is the region's leading non-dairy yogurt market. In the United Kingdom, the number of vegans is growing, and most of the population wants to reduce meat consumption as they consider themselves flexitarians. As of 2022, the number of vegans in the United Kingdom increased by more than 2 million, accounting for 132% of the vegan population, compared to 2020. The sales value of non-dairy yogurt increased by 22.7% in 2022 compared to 2021.
- France is the second-leading market for non-dairy yogurt in the region. The Y-o-Y growth rate of plant-based yogurt in France is anticipated to grow by 43.9% in 2024 compared to 2022. Plant-based food tends to sell strongest among young and urban consumers who believe eating more vegan food is healthier and more sustainable for the environment. Between 2021 and 2022, nearly 12% of French people aged between 18 and 19 years stated that they were following a vegan diet.

Europe Non-dairy Yogurt Market Trends

The innovations taking place in the industry, along with growing popularity of non-dairy products, are driving the consumption of non-dairy yogurt

- The per capita consumption of non-dairy yogurt in Europe is increasing. Manufacturers of plant-based yogurt are responding to the growing demand via new product innovations and launching a variety of flavors and indulgences, thus boosting consumption. Western Europe is the most dynamic region globally in terms of non-dairy yogurt launches. In 2021, with more than 360 plant-based yogurts launched, the region represented 66% of all launches globally.
- Germany, France, and Italy have the highest per capita consumption of non-dairy yogurt. The growing popularity of dairy alternatives, primarily in Germany, has led to the rapid growth of plant-based yogurt. More than 12 million tourists visited Germany in 2021, boosting the demand for vegan yogurt due to the growing veganism domestically and internationally.
- The UK government has set regulations restricting the products on grocery or retail shelves or any e-commerce store, along with products or drinks that are high in salt, sugar, and fat or less healthy. This factor has influenced the population to opt for non-dairy yogurt as a healthy alternative to conventional yogurt.
- Non-dairy probiotic products have gained importance in line with the ongoing shift toward vegan food and the steep prevalence of lactose intolerance among the European population. These factors are anticipated to increase the penetration of non-dairy yogurt, leading critical players across the region to constantly invest in R&D activities for product innovation, with claims like low/no sugar, to capture the evolving consumer trend. The per capita consumption of non-dairy-based yogurt products is anticipated to grow faster, i.e., at 32%, during 2024-2027.

Europe Non-dairy Yogurt Industry Overview

The Europe Non-dairy Yogurt Market is moderately consolidated, with the top five companies occupying 58.81%. The major players in this market are Coconut Collaborative Ltd, Danone SA, Oatly Group AB, Otsuka Holdings Co. Ltd and Triballat Noyal SAS (sorted alphabetically).

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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