



Dairy Products and Alternatives in Ireland

August 2024

Table of Contents

Dairy Products and Alternatives in Ireland

EXECUTIVE SUMMARY

Dairy products and alternatives in 2024: The big picture

Key trends in 2024

Competitive landscape

Channel developments

What next for dairy products and alternatives?

MARKET DATA

Table 1 - Sales of Dairy Products and Alternatives by Category: Value 2019-2024

Table 2 - Sales of Dairy Products and Alternatives by Category: % Value Growth 2019-2024

Table 3 - NBO Company Shares of Dairy Products and Alternatives: % Value 2020-2024

Table 4 - LBN Brand Shares of Dairy Products and Alternatives: % Value 2021-2024

Table 5 - Penetration of Private Label by Category: % Value 2019-2024

Table 6 - Distribution of Dairy Products and Alternatives by Format: % Value 2019-2024

Table 7 - Forecast Sales of Dairy Products and Alternatives by Category: Value 2024-2029

Table 8 - Forecast Sales of Dairy Products and Alternatives by Category: % Value Growth 2024-2029

DISCLAIMER

SOURCES

Summary 1 - Research Sources

Baby Food in Ireland

KEY DATA FINDINGS

2024 DEVELOPMENTS

Inflation and declining birth rates continue to exert downward pressure on volume sales

Gradual rise of private labels in baby food cater to price-sensitive consumers

Nestlé set to cease factory production, while local Glenilen Farm ventures into baby yoghurt

PROSPECTS AND OPPORTUNITIES

Stabilisation in prices expected, but demand limited by low birth rates and WHO targets towards breastfeeding

Health and wellness trends boost demand for functional and clean label products

Nutricia Ireland will maintain its overall lead, but rising brands can still cannibalise share

CATEGORY DATA

Table 9 - Sales of Baby Food by Category: Volume 2019-2024

Table 10 - Sales of Baby Food by Category: Value 2019-2024

Table 11 - Sales of Baby Food by Category: % Volume Growth 2019-2024

Table 12 - Sales of Baby Food by Category: % Value Growth 2019-2024

Table 13 - Sales of Growing-Up Milk Formula by Age: % Value 2019-2024

Table 14 - NBO Company Shares of Baby Food: % Value 2020-2024

Table 15 - LBN Brand Shares of Baby Food: % Value 2021-2024

Table 16 - Distribution of Baby Food by Format: % Value 2019-2024

Table 17 - Forecast Sales of Baby Food by Category: Volume 2024-2029

Table 18 - Forecast Sales of Baby Food by Category: Value 2024-2029

Table 19 - Forecast Sales of Baby Food by Category: % Volume Growth 2024-2029

Table 20 - Forecast Sales of Baby Food by Category: % Value Growth 2024-2029

Butter and Spreads in Ireland

KEY DATA FINDINGS

2024 DEVELOPMENTS

Local brands remain popular, while dairy farmers argue against supermarket price cuts

Rising consumer appetite for premium butter leads to cost-effective innovations

Cooking fats struggle as consumers prefer locally sourced butter

PROSPECTS AND OPPORTUNITIES

Kerrygold expands its production facility in Co. Cork

Innovation and reformulations in butter and spreads are driven by quality and sustainability

Health and wellness trends will continue to drive consumer preferences

CATEGORY DATA

Table 21 - Sales of Butter and Spreads by Category: Volume 2019-2024

Table 22 - Sales of Butter and Spreads by Category: Value 2019-2024

Table 23 - Sales of Butter and Spreads by Category: % Volume Growth 2019-2024

Table 24 - Sales of Butter and Spreads by Category: % Value Growth 2019-2024

Table 25 - NBO Company Shares of Butter and Spreads: % Value 2020-2024

Table 26 - LBN Brand Shares of Butter and Spreads: % Value 2021-2024

Table 27 - Distribution of Butter and Spreads by Format: % Value 2019-2024

Table 28 - Forecast Sales of Butter and Spreads by Category: Volume 2024-2029

Table 29 - Forecast Sales of Butter and Spreads by Category: Value 2024-2029

Table 30 - Forecast Sales of Butter and Spreads by Category: % Volume Growth 2024-2029

Table 31 - Forecast Sales of Butter and Spreads by Category: % Value Growth 2024-2029

Cheese in Ireland

KEY DATA FINDINGS

2024 DEVELOPMENTS

High prices drive consumers to private label options in cheese

Packaged cheese more appealing than unpackaged variants

Innovation in cheeses driven by new consumption occasions

PROSPECTS AND OPPORTUNITIES

Health and wellness trends drive new developments

Cheese is expected to remain highly fragmented

A return to positive retail volume growth is expected

CATEGORY DATA

Table 32 - Sales of Cheese by Category: Volume 2019-2024

Table 33 - Sales of Cheese by Category: Value 2019-2024

Table 34 - Sales of Cheese by Category: % Volume Growth 2019-2024

Table 35 - Sales of Cheese by Category: % Value Growth 2019-2024

Table 36 - Sales of Spreadable Cheese by Type: % Value 2019-2024

Table 37 - Sales of Soft Cheese by Type: % Value 2019-2024

Table 38 - Sales of Hard Cheese by Type: % Value 2019-2024

Table 39 - NBO Company Shares of Cheese: % Value 2020-2024

Table 40 - LBN Brand Shares of Cheese: % Value 2021-2024

Table 41 - Distribution of Cheese by Format: % Value 2019-2024

Table 42 - Forecast Sales of Cheese by Category: Volume 2024-2029

Table 43 - Forecast Sales of Cheese by Category: Value 2024-2029

Table 44 - Forecast Sales of Cheese by Category: % Volume Growth 2024-2029

Table 45 - Forecast Sales of Cheese by Category: % Value Growth 2024-2029

Drinking Milk Products in Ireland

KEY DATA FINDINGS

2024 DEVELOPMENTS

Milk prices stabilise and Irish dairy is looking resilient, although some uncertainties remain
Leading Glanbia faces competition from the rise of private label
Fortified products attract attention, while low-fat milk faces scrutiny

PROSPECTS AND OPPORTUNITIES

Exploring health and wellness credentials and the potential of sheep milk
Glanbia Plc to maintain its leading position – even with increased competition
Transitioning from a volume-based to a value-added dairy industry

CATEGORY DATA

Table 46 - Sales of Drinking Milk Products by Category: Volume 2019-2024
Table 47 - Sales of Drinking Milk Products by Category: Value 2019-2024
Table 48 - Sales of Drinking Milk Products by Category: % Volume Growth 2019-2024
Table 49 - Sales of Drinking Milk Products by Category: % Value Growth 2019-2024
Table 50 - NBO Company Shares of Drinking Milk Products: % Value 2020-2024
Table 51 - LBN Brand Shares of Drinking Milk Products: % Value 2021-2024
Table 52 - Distribution of Drinking Milk Products by Format: % Value 2019-2024
Table 53 - Forecast Sales of Drinking Milk Products by Category: Volume 2024-2029
Table 54 - Forecast Sales of Drinking Milk Products by Category: Value 2024-2029
Table 55 - Forecast Sales of Drinking Milk Products by Category: % Volume Growth 2024-2029
Table 56 - Forecast Sales of Drinking Milk Products by Category: % Value Growth 2024-2029

Yoghurt and Sour Milk Products in Ireland

KEY DATA FINDINGS

2024 DEVELOPMENTS

Health trends attract consumers to yoghurt and sour milk products, despite high prices
New launches based on products fortified with fibre and protein
Leading players face cannibalised share by smaller brands

PROSPECTS AND OPPORTUNITIES

Sour milk products and healthier yoghurt options will see increasing demand
Rising competition from plant-based variants leads players to emphasise their products' health benefits
New formats developed for convenient and on-the-go consumption

CATEGORY DATA

Table 57 - Sales of Yoghurt and Sour Milk Products by Category: Volume 2019-2024
Table 58 - Sales of Yoghurt and Sour Milk Products by Category: Value 2019-2024
Table 59 - Sales of Yoghurt and Sour Milk Products by Category: % Volume Growth 2019-2024
Table 60 - Sales of Yoghurt and Sour Milk Products by Category: % Value Growth 2019-2024
Table 61 - Sales of Flavoured Yoghurt by Flavour: Rankings 2019-2024
Table 62 - NBO Company Shares of Yoghurt and Sour Milk Products: % Value 2020-2024
Table 63 - LBN Brand Shares of Yoghurt and Sour Milk Products: % Value 2021-2024
Table 64 - Distribution of Yoghurt and Sour Milk Products by Format: % Value 2019-2024
Table 65 - Forecast Sales of Yoghurt and Sour Milk Products by Category: Volume 2024-2029
Table 66 - Forecast Sales of Yoghurt and Sour Milk Products by Category: Value 2024-2029
Table 67 - Forecast Sales of Yoghurt and Sour Milk Products by Category: % Volume Growth 2024-2029
Table 68 - Forecast Sales of Yoghurt and Sour Milk Products by Category: % Value Growth 2024-2029

Other Dairy in Ireland

KEY DATA FINDINGS

2024 DEVELOPMENTS

HFSS regulations push for reformulation to meet health credentials
Ongoing demand for indulgence, as chilled dairy desserts seen as affordable luxury
Coffee whiteners continue to face declining popularity

PROSPECTS AND OPPORTUNITIES

Cream will rise back to stronger volume sales over the forecast period
Health and wellness trends will drive further developments, benefitting fromage frais and quark
Discounters and convenience stores will continue to see increased distribution

CATEGORY DATA

Table 69 - Sales of Other Dairy by Category: Volume 2019-2024
Table 70 - Sales of Other Dairy by Category: Value 2019-2024
Table 71 - Sales of Other Dairy by Category: % Volume Growth 2019-2024
Table 72 - Sales of Other Dairy by Category: % Value Growth 2019-2024
Table 73 - Sales of Cream by Type: % Value 2019-2024
Table 74 - NBO Company Shares of Other Dairy: % Value 2020-2024
Table 75 - LBN Brand Shares of Other Dairy: % Value 2021-2024
Table 76 - Distribution of Other Dairy by Format: % Value 2019-2024
Table 77 - Forecast Sales of Other Dairy by Category: Volume 2024-2029
Table 78 - Forecast Sales of Other Dairy by Category: Value 2024-2029
Table 79 - Forecast Sales of Other Dairy by Category: % Volume Growth 2024-2029
Table 80 - Forecast Sales of Other Dairy by Category: % Value Growth 2024-2029

Plant-Based Dairy in Ireland

KEY DATA FINDINGS

2024 DEVELOPMENTS

Plant-based dairy achieves healthy retail value and volume growth
Innovations in plant-based dairy boosted by health and wellness and sustainability trends
Alpro maintains its strong overall and plant-based milk lead, while private labels top plant-based cheese

PROSPECTS AND OPPORTUNITIES

Brands emphasise their local positioning to launch their plant-based options
Health and wellness trends will continue to drive developments in plant-based dairy
Plant-based milk benefits from strong advertising and promotions

CATEGORY DATA

Table 81 - Sales of Plant-Based Dairy by Category: Value 2019-2024
Table 82 - Sales of Plant-Based Dairy by Category: % Value Growth 2019-2024
Table 83 - Sales of Other Plant-Based Milk by Type: % Value 2021-2024
Table 84 - NBO Company Shares of Plant-Based Dairy: % Value 2020-2024
Table 85 - LBN Brand Shares of Plant-Based Dairy: % Value 2021-2024
Table 86 - Distribution of Plant-Based Dairy by Format: % Value 2019-2024
Table 87 - Forecast Sales of Plant-Based Dairy by Category: Value 2024-2029
Table 88 - Forecast Sales of Plant-Based Dairy by Category: % Value Growth 2024-2029

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-ireland/report.