

## MARKET INNOVATION OVERVIEW

**CATEGORY:** Dairy | **COUNTRY:** Spain

*Este documento foi elaborado no âmbito do projeto PortugalFoods Qualifica, com o objetivo de criar informação de alto valor acrescentado para as PME e restantes entidades do setor agroalimentar nacional, para que estas se possam posicionar estrategicamente no contexto do mercado global.*

*A informação contida neste documento provém do Observatório da PortugalFoods que, com recurso à plataforma Mintel, permite contribuir para a qualificação e sensibilização do setor agroalimentar, tanto ao nível do conhecimento sobre novos produtos e técnicas de produção, como ao nível do acompanhamento da evolução tecnológica e da evolução das preferências do consumidor.*

*A Mintel cataloga mais de 38 000 novos lançamentos de produto por mês, provenientes dos 86 mercados que monitoriza, analisando e categorizando todos os seus atributos, tais como os ingredientes, posicionamento e comunicação ao consumidor.*

*O Observatório da PortugalFoods constitui-se assim como uma ferramenta de grande importância para alicerçar o conhecimento das empresas do Setor Agroalimentar.*

### A REGIONAL INTRODUCTION:

#### DAIRY PRODUCTS IN EUROPE, MIDDLE EAST AND AFRICA

##### CHEESE

**Tap into snacking:** On-the-go formats, could encourage consumers to switch their snacking preferences to cheese, particularly if is combined with healthy snacking components such as nuts/seeds, meat and crackers.

##### BUTTER

**Promote local produce:** Emphasising regional production and ingredients taps into consumer interest in supporting local producers and suppliers.

##### DAIRY DRINKS

**Focus on digestive health:** As consumers increasingly seek solutions that improve gut health, it is important for dairy drink producers to focus innovation around digestibility to meet this demand.

##### YOGURT

**Cleaner labels:** Responding to consumer demand for more natural and cleaner products, yogurt brands should look at eliminating unwanted ingredients – particularly sugar, and providing full disclosure around processing methods.



## DAIRY PRODUCTS IN SPAIN

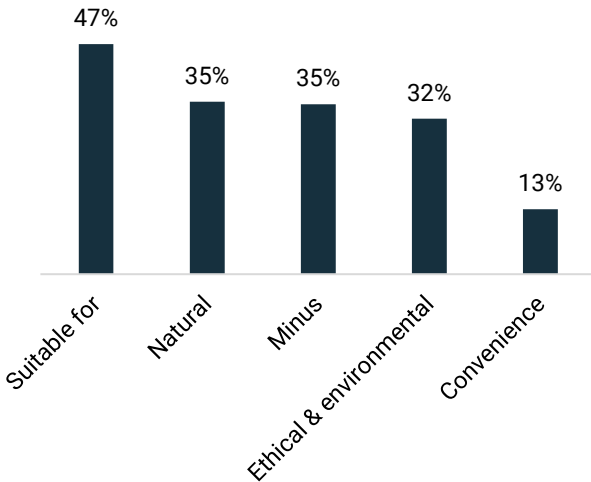
### Market Overview

The Spanish dairy sector is expected to grow from €9.4 billion in 2018 to €10.2 billion by 2023, at a CAGR of 1.7%. In volume terms, the sector is expected to grow from 4.8 billion kg in 2018 to 4.9 billion kg by 2023, registering a CAGR of 0.4%.

Per capita consumption of dairy in Spain stood at 103.3kg in 2018 and is expected to grow and reach 106.0kg by 2023. Per capita expenditure in Spain stood at €201.2 in 2018 and is expected to reach €220.5 by 2023. (GlobalData, 2020)

### New Product Development Analysis

Top 5 Category of Claims in Dairy product launches



The most active sub-category in the dairy sector, in terms of new product launches in the market, was the 'Spoonable Yogurt', with a 27% share of products. The 'Drinking Yogurt' sub-category saw 14% of launches in the analysed period of time.



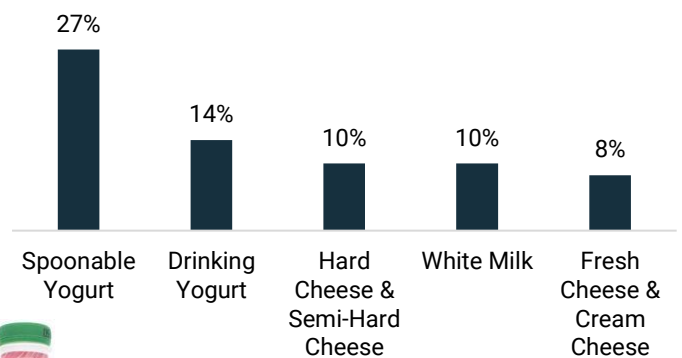
This 100% natural product does not contain artificial E-s or gluten, and retails in a recyclable pack with 2 x 125g units.

**10%**

of food products launched in Spain between July 2018 and June 2019 were Dairy Products.

In the Spanish dairy market, the 'Suitable for' claims were present in almost half of the products launched between July 2018 and June 2019, mostly due to the 'Gluten-Free' claim. The 'Natural' and 'Minus' claim categories were tied, driven by the 'Organic' and the 'Reduced/No Fat' claims.

Top 5 Sub-Categories in Dairy product launches



This organic product contains 0% milk fat and retails in a 500g bottle featuring the EU Green Leaf logo.



This organic product retails in a 200g pack featuring the EU Green Leaf and the Protected Designation of Origin logo.



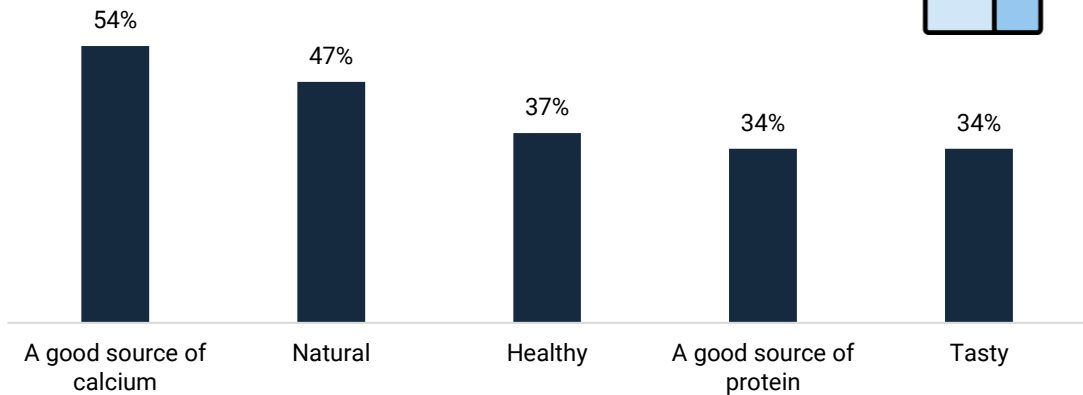
## THE SPANISH CONSUMER



**57%**

I would pay more for milk that guaranteed **minimal use of antibiotics** in dairy farming (2018)

Qualities associated with cow's milk (2018)



## A GLOBAL LOOK INTO THE FUTURE

### CHEESE

**Address the health agenda:** Cheese has a broad global reputation for positive health attributes including protein and calcium content. Fat content continues to divide opinion. Positive nutritional messages need to be a key focus and potential negatives should be addressed.

### BUTTER

**Increasing usage by adding value:** Traditional consumption of butter is in decline as consumers are eating less bread and other eating habits are changing. As a result, brands are attempting to increase usage frequency by adding functionality, flavours, and blends.

### DAIRY DRINKS

**Fermentation revival in dairy:** Benefiting from the functional food and drink trend, interest around fermented dairy drinks has grown this year with a rise in kefir, yogurt drinks and other fermented milks as consumers are looking for healthy and functional drinks that provide added health benefits.

### YOGURT

**Green health:** The environmental impact of dairy production is under scrutiny, forcing brands to think of new avenues to improve their sustainability credentials. In addition to appealing to a broadening audience of consumers, strong and clear environmental claims will also help reinforce the health credentials of dairy yogurt.

*Para mais informações acerca do Observatório da PortugalFoods, por favor contactar*

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