

Dairy Products and Alternatives in Switzerland

September 2023

Table of Contents

Dairy Products and Alternatives in Switzerland

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 Switzerland

KEY DATA FINDINGS

2023 DEVELOPMENTS

Decreasing birth rates remain a challenge for baby food players

Convenience drives growth in other baby food, as well as prepared options

Players focus on promoting organic attributes and added-benefits

PROSPECTS AND OPPORTUNITIES

Products that align with the organic and convenience trend will perform well

Opportunity is found in the convenience and sustainability trends

Plant-based trends are set to continue, with EU legislation creating a healthier image

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 Switzerland

KEY DATA FINDINGS

2023 DEVELOPMENTS

Health and wellness trends challenge butter sales, while margarine performs better
Modern grocery retailers continue to lead sales, and discounters increase their share
Domestic player Branchenorganisation Butter maintains its strong lead

PROSPECTS AND OPPORTUNITIES

The health and wellness trend leads to a qualitative consumption approach
Private label lines prevent price increases as brands remain competitive
Veganism and plant-based alternatives are a growing challenge for butter

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 Switzerland

KEY DATA FINDINGS

2023 DEVELOPMENTS

Cheese sales benefit from the offering of high-quality, domestic produce
Soft cheese boosts current retail value growth due to its healthier image
Domestic players lead, with consumers regarding Swiss cheese as superior

PROSPECTS AND OPPORTUNITIES

Positive growth is driven by soft cheese, which remains popular due to its versatility
Swissness will boost the growth of domestic goods, with imports benefiting from low prices
Challenges include the rise of discounters, as price competition increases

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 Switzerland

KEY DATA FINDINGS

2023 DEVELOPMENTS

Higher price points and the rise of milk alternatives challenges cow's milk
Goat's milk becomes popular, aligning with the ongoing health and wellness trend
Grocery retailers appeal through domestic origin and sustainable practices

PROSPECTS AND OPPORTUNITIES

Sales falls as the threat from plant-based milk alternatives rises
Goat milk farming increases as goat milk rises in popularity
Players focus on sustainable packaging to align to consumers rising demands

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 Switzerland

KEY DATA FINDINGS

2023 DEVELOPMENTS

Yoghurt and sour milk products benefit from an alignment with the health and wellness trend
Plain yoghurt leads growth, with consumers appreciating natural ingredients
Migros, Coop and Emmi lead development trends in yoghurt and sour milk products

PROSPECTS AND OPPORTUNITIES

The focus on health and wellness will aid sales across the coming years
New launches focus on added-value benefits, low fat and high protein
Supermarkets retain a strong position, with Migros and Coop leading sales

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 Switzerland

KEY DATA FINDINGS

2023 DEVELOPMENTS

Health and wellness attributes boost sales on the other dairy landscape
Private label leads sales, viewed as being high-quality goods with lower price points
Migros maintains its lead thanks to strong brand loyalty and ongoing sustainability

PROSPECTS AND OPPORTUNITIES

Health and wellness will drive sales and shape new product developments
Condensed milk suffers from a poor image as consumers select healthier options
Private label continues to appeal, offering value at lower price points

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 Switzerland

KEY DATA FINDINGS

2023 DEVELOPMENTS

Sales are driven by health, veganism and rising interest in sustainability
Other plant-based milk sees positive growth, bolstered by the popularity of oat products
Players focus on innovative launches to boost sales in a new category

PROSPECTS AND OPPORTUNITIES

The growing popularity of veganism boosts growth across the forecast period
Rising interest in sustainability set to drive ongoing growth in plant-based options
Soy milk is replaced with oat, rice and coconut options, while potato milk gains ground

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-switzerland/report.