



Passport

Other Dairy in Lithuania

Euromonitor International

October 2021

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purposes only.

Some content and data have been
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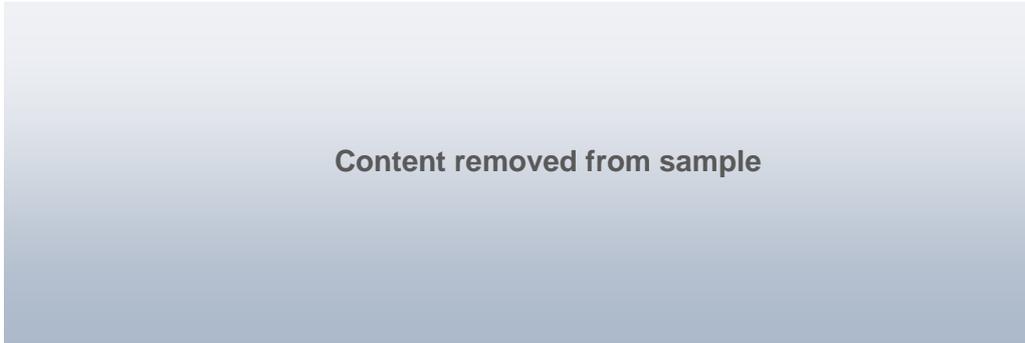
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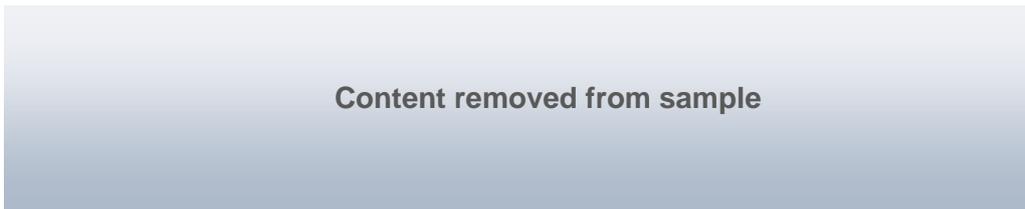
OTHER DAIRY IN LITHUANIA - CATEGORY ANALYSIS

KEY DATA FINDINGS

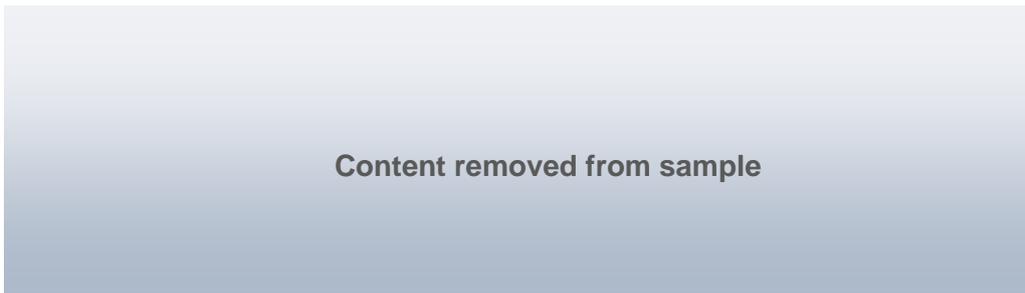


2021 DEVELOPMENTS

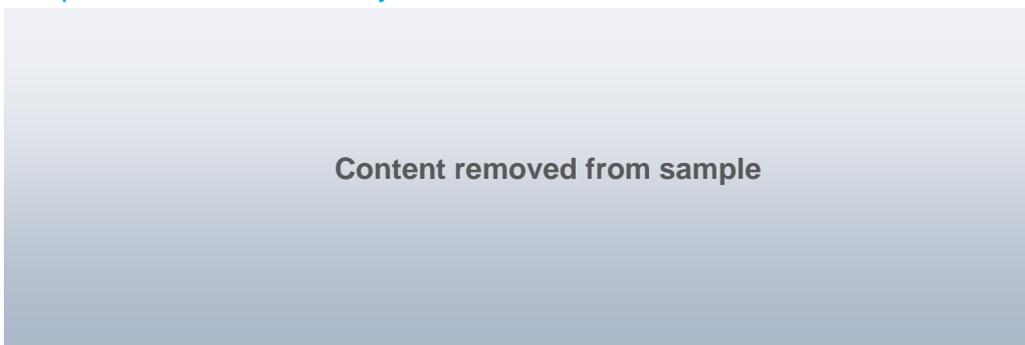
Influence of COVID-19 and Lidl



Products to appeal to increasingly health-conscious consumers



Pieno Zvaigzdes maintains its lead, offering well-established brands that are perceived to be healthy



PROSPECTS AND OPPORTUNITIES

Expansion of functional and wellness products

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Cream will remain the most significant product, despite its unhealthy image, due to its versatility

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Rokiskio Pienas expands production facilities and capacity

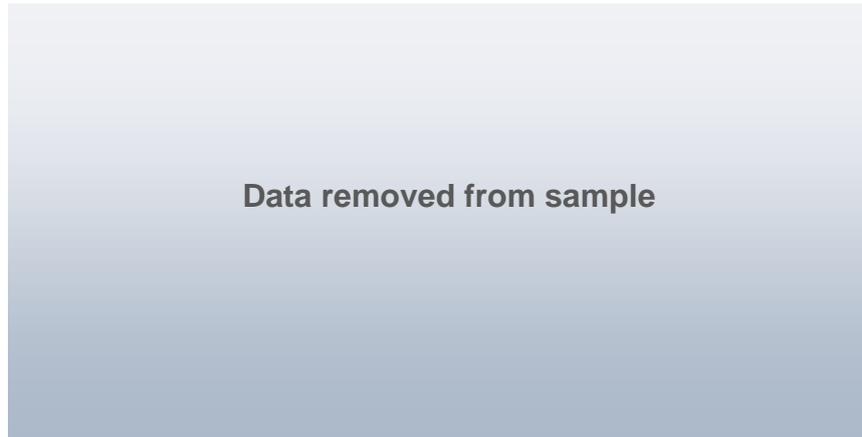
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CATEGORY DATA

Table 1 Sales of Other Dairy by Category: Volume 2016-2021

	2016	2017	2018	2019	2020	2021
- Condensed Milk (million litres)	Data removed from sample					
-- Plain Condensed Milk (million litres)						
-- Flavoured Condensed Milk (million litres)						
- Coffee Whiteners ('000 tonnes)						
- Cream ('000 tonnes)						
- Chilled Snacks ('000 tonnes)						
- Fromage Frais and Quark ('000 tonnes)						
-- Plain Fromage Frais						

- and Quark ('000 tonnes)
- Flavoured Fromage Frais and Quark ('000 tonnes)
- Savoury Fromage Frais and Quark ('000 tonnes)
- Chilled and Shelf Stable Desserts ('000 tonnes)
- Other Dairy (Not calculable)
- Chilled Dairy Desserts ('000 tonnes)
- Shelf Stable Dairy Desserts ('000 tonnes)



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 2 Sales of Other Dairy by Category: Value 2016-2021

EUR million

	2016	2017	2018	2019	2020	2021
- Condensed Milk	Data removed from sample					
-- Plain Condensed Milk						
-- Flavoured Condensed Milk						
- Coffee Whiteners						
- Cream						
- Chilled Snacks						
- Fromage Frais and Quark						
-- Plain Fromage Frais and Quark						
-- Flavoured Fromage Frais and Quark						
-- Savoury Fromage Frais and Quark						
- Chilled and Shelf Stable Desserts						
Other Dairy						
-- Chilled Dairy Desserts						
-- Shelf Stable Dairy Desserts						

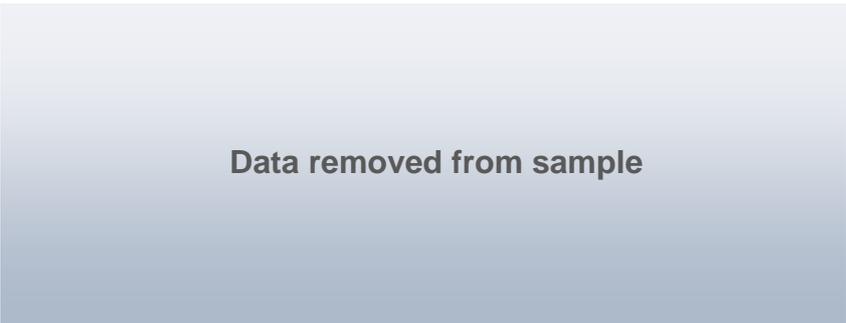
Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 3 Sales of Other Dairy by Category: % Volume Growth 2016-2021

% volume growth

	2020/21	2016-21 CAGR	2016/21 Total
- Condensed Milk	Data removed from sample		
-- Plain Condensed Milk			
-- Flavoured Condensed Milk			
- Coffee Whiteners			
- Cream			

- Chilled Snacks
- Fromage Frais and Quark
- Plain Fromage Frais and Quark
- Flavoured Fromage Frais and Quark
- Savoury Fromage Frais and Quark
- Chilled and Shelf Stable Desserts
- Other Dairy
- Chilled Dairy Desserts
- Shelf Stable Dairy Desserts



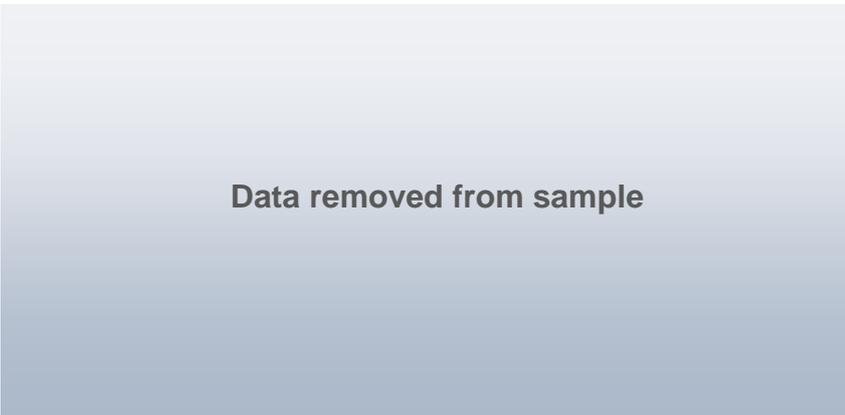
Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 4 Sales of Other Dairy by Category: % Value Growth 2016-2021

% current value growth

2020/21 2016-21 CAGR 2016/21 Total

- Condensed Milk
- Plain Condensed Milk
- Flavoured Condensed Milk
- Coffee Whiteners
- Cream
- Chilled Snacks
- Fromage Frais and Quark
- Plain Fromage Frais and Quark
- Flavoured Fromage Frais and Quark
- Savoury Fromage Frais and Quark
- Chilled and Shelf Stable Desserts
- Other Dairy
- Chilled Dairy Desserts
- Shelf Stable Dairy Desserts

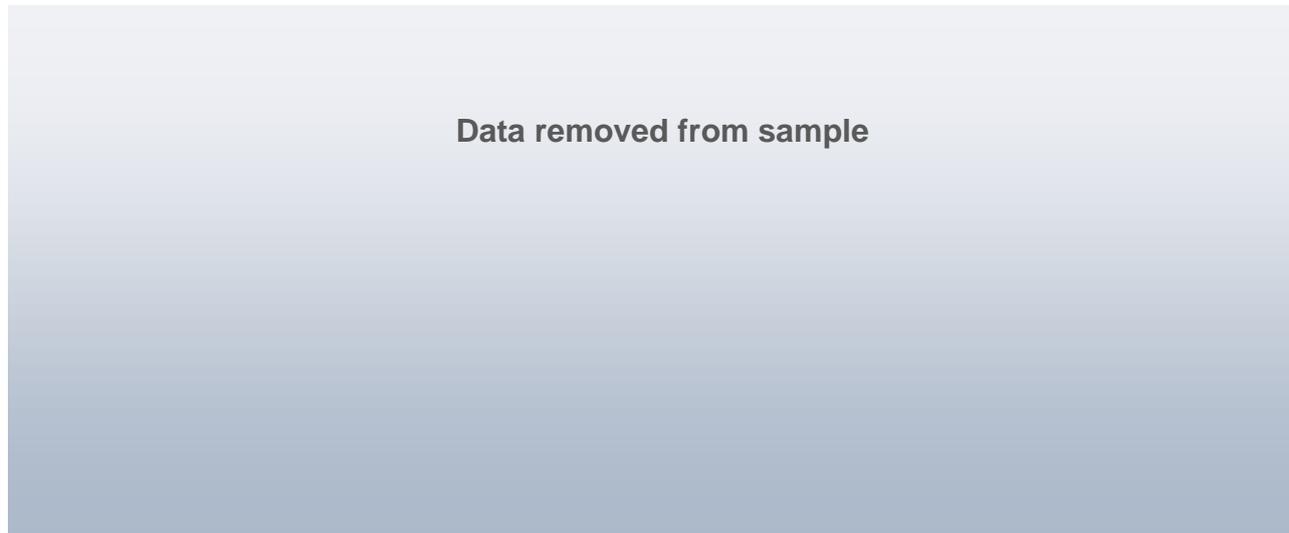


Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 5 NBO Company Shares of Other Dairy: % Value 2017-2021

% retail value rsp

Company 2017 2018 2019 2020 2021



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 6 LBN Brand Shares of Other Dairy: % Value 2018-2021

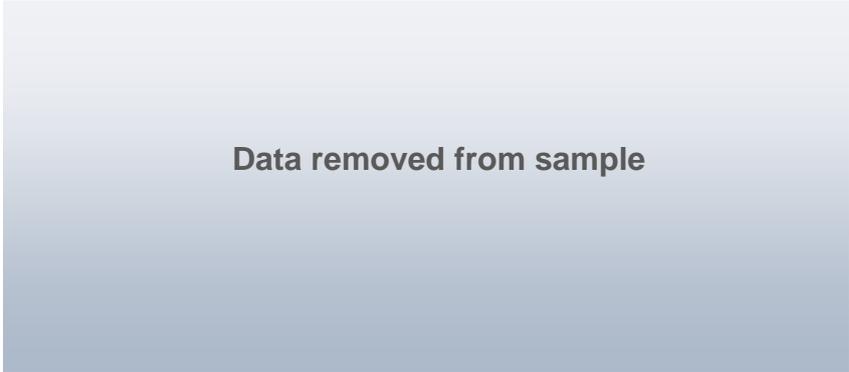
% retail value rsp Brand (GBO)	Company (NBO)	2018	2019	2020	2021
Data removed from sample					

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 7 Distribution of Other Dairy by Format: % Value 2016-2021

% retail value rsp	2016	2017	2018	2019	2020	2021
Store-Based Retailing	Data removed from sample					
- Grocery Retailers						
-- Modern Grocery Retailers						
--- Convenience Stores						
--- Discounters						
--- Forecourt Retailers						
--- Hypermarkets						
--- Supermarkets						
-- Traditional Grocery Retailers						
--- Food/drink/tobacco specialists						
--- Independent Small Grocers						

- Other Grocery Retailers
- Non-Grocery Specialists
- Health and Beauty Specialist Retailers
- Other Foods Non-Grocery Specialists
- Mixed Retailers
- Non-Store Retailing
- Vending
- Homeshopping
- E-Commerce
- Direct Selling
- Total



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 8 Forecast Sales of Other Dairy by Category: Volume 2021-2026

	2021	2022	2023	2024	2025	2026
- Condensed Milk (million litres)	Data removed from sample					
-- Plain Condensed Milk (million litres)						
-- Flavoured Condensed Milk (million litres)						
- Coffee Whiteners ('000 tonnes)						
- Cream ('000 tonnes)						
- Chilled Snacks ('000 tonnes)						
- Fromage Frais and Quark ('000 tonnes)						
-- Plain Fromage Frais and Quark ('000 tonnes)						
-- Flavoured Fromage Frais and Quark ('000 tonnes)						
-- Savoury Fromage Frais and Quark ('000 tonnes)						
- Chilled and Shelf Stable Desserts ('000 tonnes)						
Other Dairy (Not calculable)						
-- Chilled Dairy Desserts ('000 tonnes)						
-- Shelf Stable Dairy Desserts ('000 tonnes)						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 9 Forecast Sales of Other Dairy by Category: Value 2021-2026

EUR million

	2021	2022	2023	2024	2025	2026
- Condensed Milk	Data removed from sample					
-- Plain Condensed Milk						
-- Flavoured Condensed Milk						
- Coffee Whiteners						
- Cream						
- Chilled Snacks						
- Fromage Frais and Quark						
-- Plain Fromage Frais and Quark						
-- Flavoured Fromage Frais and Quark						
-- Savoury Fromage Frais and Quark						
- Chilled and Shelf Stable Desserts						
Other Dairy						
-- Chilled Dairy Desserts						
-- Shelf Stable Dairy Desserts						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 10 Forecast Sales of Other Dairy by Category: % Volume Growth 2021-2026

% volume growth	2021/22	2021-26 CAGR	2021/26 Total
- Condensed Milk	Data removed from sample		
-- Plain Condensed Milk			
-- Flavoured Condensed Milk			
- Coffee Whiteners			
- Cream			
- Chilled Snacks			
- Fromage Frais and Quark			
-- Plain Fromage Frais and Quark			
-- Flavoured Fromage Frais and Quark			
-- Savoury Fromage Frais and Quark			
- Chilled and Shelf Stable Desserts			
Other Dairy			
-- Chilled Dairy Desserts			
-- Shelf Stable Dairy Desserts			

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 11 Forecast Sales of Other Dairy by Category: % Value Growth 2021-2026

% constant value growth	2021/2022	2021-26 CAGR	2021/26 Total
- Condensed Milk	Data removed from sample		
-- Plain Condensed Milk			
-- Flavoured Condensed Milk			
- Coffee Whiteners			
- Cream			

- Chilled Snacks
- Fromage Frais and Quark
- Plain Fromage Frais and Quark
- Flavoured Fromage Frais and Quark
- Savoury Fromage Frais and Quark
- Chilled and Shelf Stable Desserts
- Other Dairy
- Chilled Dairy Desserts
- Shelf Stable Dairy Desserts

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

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DAIRY PRODUCTS AND ALTERNATIVES IN LITHUANIA - INDUSTRY OVERVIEW

EXECUTIVE SUMMARY

Dairy products and alternatives in 2021: The big picture

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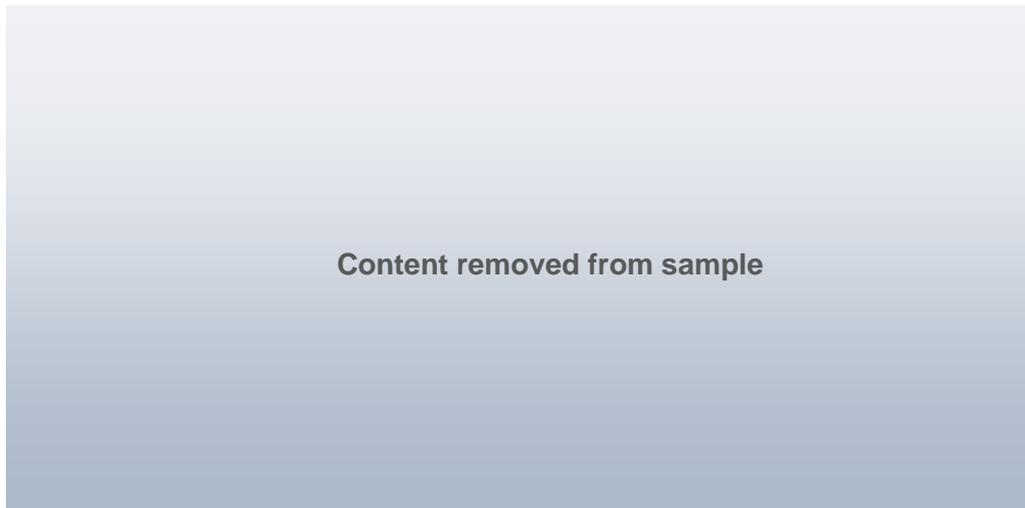
Key trends in 2021

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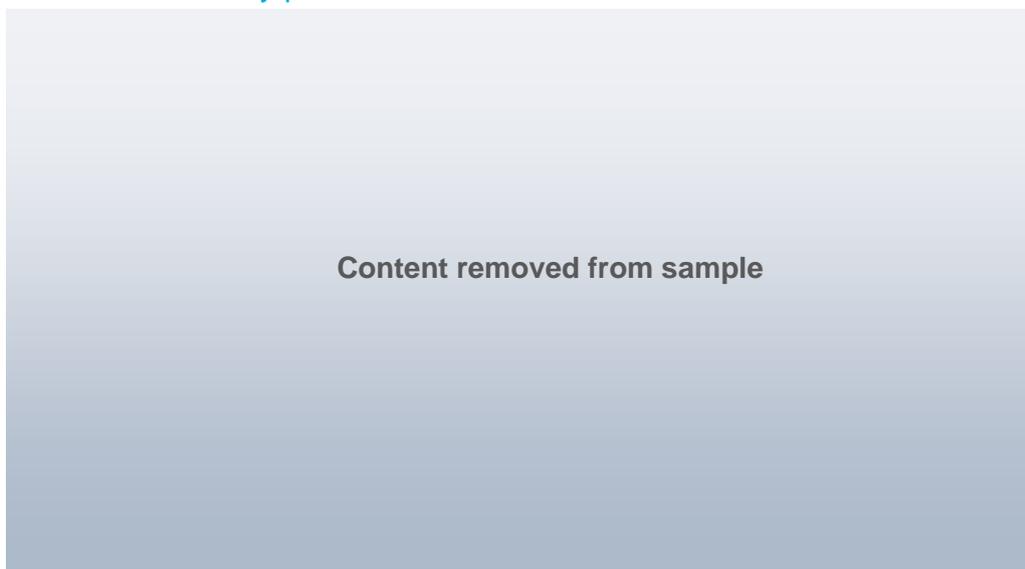
Competitive landscape

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Channel developments



What next for dairy products and alternatives?



MARKET DATA

Table 12 Sales of Dairy Products and Alternatives by Category: Value 2016-2021

EUR million

	2016	2017	2018	2019	2020	2021
Baby Food	Data removed from sample					
Dairy						
Dairy Products and Alternatives						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 13 Sales of Dairy Products and Alternatives by Category: % Value Growth 2016-2021

% current value growth

2020/21 2016-21 CAGR 2016/21 Total

Baby Food
Dairy
Dairy Products and Alternatives

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 14 NBO Company Shares of Dairy Products and Alternatives: % Value 2017-2021

% retail value rsp
Company

2017 2018 2019 2020 2021

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 15 LBN Brand Shares of Dairy Products and Alternatives: % Value 2018-2021

% retail value rsp Brand (GBO)	Company (NBO)	2018	2019	2020	2021
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% retail value rsp Brand (GBO)	Company (NBO)	2018	2019	2020	2021
Data removed from sample					

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 16 Penetration of Private Label by Category: % Value 2016-2021

% retail value rsp	2016	2017	2018	2019	2020	2021
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Baby Food Dairy Dairy Products and Alternatives	Data removed from sample					
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Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 17 Distribution of Dairy Products and Alternatives by Format: % Value 2016-2021

% retail value rsp	2016	2017	2018	2019	2020	2021
Store-Based Retailing	Data removed from sample					
- Grocery Retailers						
-- Modern Grocery Retailers						
--- Convenience Stores						
--- Discounters						
--- Forecourt Retailers						
--- Hypermarkets						
--- Supermarkets						
-- Traditional Grocery Retailers						
--- Food/drink/tobacco specialists						
--- Independent Small Grocers						
--- Other Grocery Retailers						
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-- Other Foods Non-Grocery Specialists						
- Mixed Retailers						
Non-Store Retailing						
- Vending						
- Homeshopping						
- E-Commerce						
- Direct Selling						
Total						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 18 Forecast Sales of Dairy Products and Alternatives by Category: Value 2021-2026

EUR million	2021	2022	2023	2024	2025	2026
Baby Food	Data removed from sample					
Dairy Products and Alternatives						
Dairy						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 19 Forecast Sales of Dairy Products and Alternatives by Category: % Value Growth 2021-2026

% constant value growth

2021/2022 2021-26 CAGR 2021/26 Total

Baby Food
Dairy Products and Alternatives
Dairy

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

DISCLAIMER

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SOURCES

Sources used during research include the following:

Summary 1 Research Sources

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Source: Euromonitor International