Consumer insight

Global cheese report 2021

The top six takeaways

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Report outline & methodology

Summary insight

Representing a good compromise between health and taste, cheese is benefiting from an increase in at-home consumption occasions.

Our major consumer study takes a deep dive into the global cheese market to explore the impact of the Covid-19 pandemic on consumption and investigates future trends and opportunities. The study explores why, when and where consumers purchase and eat cheese today, and how these patterns might change going forward. It also identifies three key market segments differentiated by consumer attitudes.

Conducted in January and February 2021, the research comprised 4,500 online interviews with consumers in nine countries: Brazil, China, Germany, India, Italy, Russia, South Africa, Turkey and the USA. The format was a quantitative questionnaire of about 25 minutes conducted in the local language. All participants were adults with grocery shopping responsibilities.

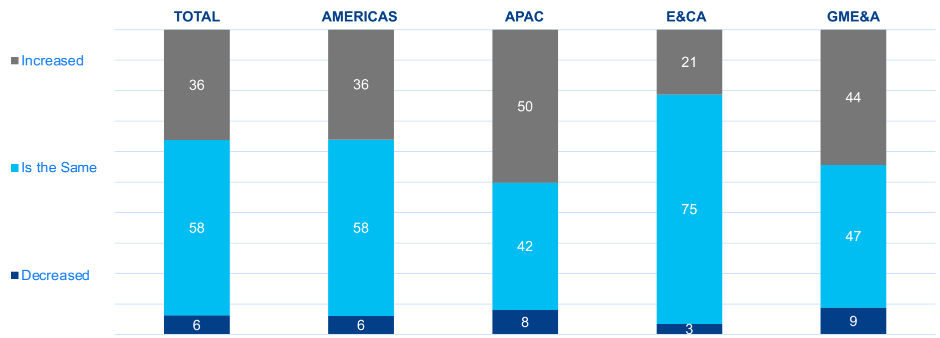
1. Pandemic boosts consumption

Consumers say that their consumption has increased as they spend more time at home during the pandemic. Globally, more than a third (36%) of participants report their consumption has increased, with just 6% saying it has gone down. The highest reported increase is in yellow cheese, with 39% globally saying they are eating more. The lowest is white cheese, but even for this, 29% of consumers globally say they are eating more. Generally, consumers recognise the different types of cheese but don't associate them with brands or formats.

Geographically, increased consumption is highest in Asia Pacific where 50% report an increase in consumption, and Greater Middle East & Africa where 44% say they are eating more cheese. There are notable variations by country, with India (60%), Turkey (54%), Brazil (46%) and China (41%) topping the lists for reports of consumption growth. Russia was the lowest (18%).

It's not just about the pandemic. A significant percentage of respondents (32% overall) say their consumption of cheese will also increase in the future – especially in India, China and Turkey. Processed unspreadable cheese shows the highest rate of predicted increased consumption (37%).

1. % Changes in cheese consumption due to Covid-19



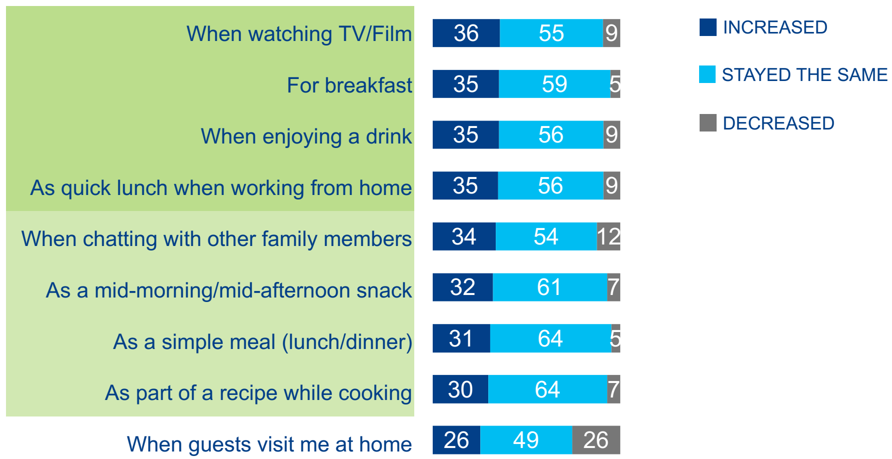
Consumption is up everywhere, particularly in Asia Pacific and Greater Middle East & Africa

2. Consumption occasions increase

More time spent in the home has also impacted positively on consumption occasions, which are up across the board – particularly in Asia Pacific. Cheese is consumed everywhere throughout the day. In-home snacking is a growing trend, with cheese widely enjoyed while watching TV (up 36%) or when enjoying a drink (up 35%) and mid-morning/mid-afternoon (up 32%). The choice of cheese tends to vary by occasion: for example, yellow cheese with a drink, unspreadable while watching TV and spreadable for a quick lunch.

Main meals are still the most important occasion, however, especially breakfast (eight out of nine countries), mentioned by 47% of participants, although dinner is not far behind (42%).

2. % Changes in at-home cheese consumption occasions globally



Changing consumption patterns show that in-home snacking is a growing trend

3. Taste and health are the main consumption drivers

Cheese is widely seen by consumers as healthy, with 56% of respondents making this association. It's also seen as very nutritious (51%), and high in protein (42%) and calcium (41%). Indeed, its healthiness is cited as the #2 reason for consumption, although this is far exceeded by tastiness, cited by 25% of respondents – up considerably from 20% in our last global cheese consumer research report conducted in 2018.

Tastiness is particularly important in Germany (41%), Brazil (31%) and the USA (30%), whereas healthiness rates highest in India (17%), Turkey (16%) and China (15%). Nutrition is China's strongest association, cited by 64% of respondents. The association with health is particularly strong in Asia Pacific (65%) and Greater Middle East & Africa (60%) – these regions also value cheese highly for its nutrition, protein and calcium. European participants notably value freedom from additives (30% versus the global average of 26%). Finally, when asked what drives their choice of purchase, consumers globally choose taste (48%), freshness (41%) and then price (36%).

4. Plant-based cheese is on the rise

The plant-based cheese market has been transformed since our last global cheese consumer research report in 2018, when it wasn't even on the radar. Today, it remains a niche product, but one with high potential for growth as awareness grows strongly.

Our 2021 research report shows awareness is highest in Asia Pacific, where plant-based is perceived as fresh, natural and low in calories: 80% of participants have heard of plant-based cheese here and 34% have tried it. Awareness is lowest in Greater Middle East & Africa, but it is still significant, with 57% being aware of it and 18% having tried it. At country level, awareness is lowest in the USA and South Africa, where only around half of consumers have heard of plant-based cheese.

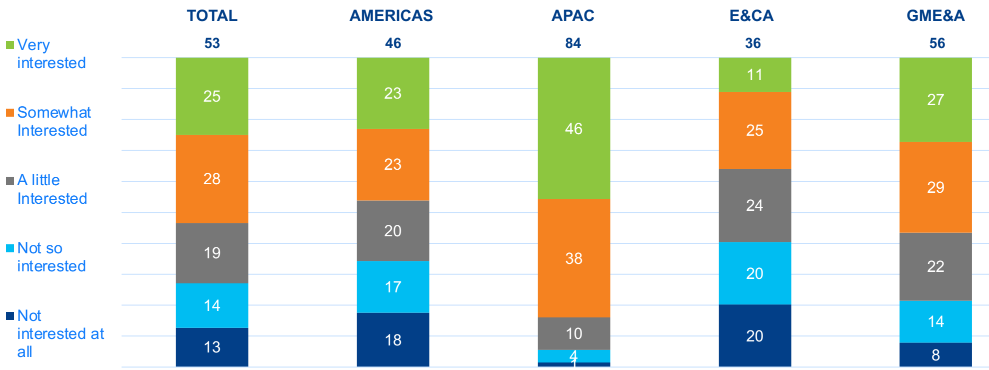
Globally, half of our participants express interest in buying the product, rising to striking highs of 82% in China and 86% in India. Purchase drivers include naturalness, taste, environmental friendliness, freshness and absence of additives.

3. % Associations with cheese globally

% Reasons for consumption globally

Cheese is widely seen as healthy and nutritious, but tastiness is the leading consumption driver

4. % Interest in buying plant-based cheese



Significant interest in plant-based cheese shows high potential growth for the category

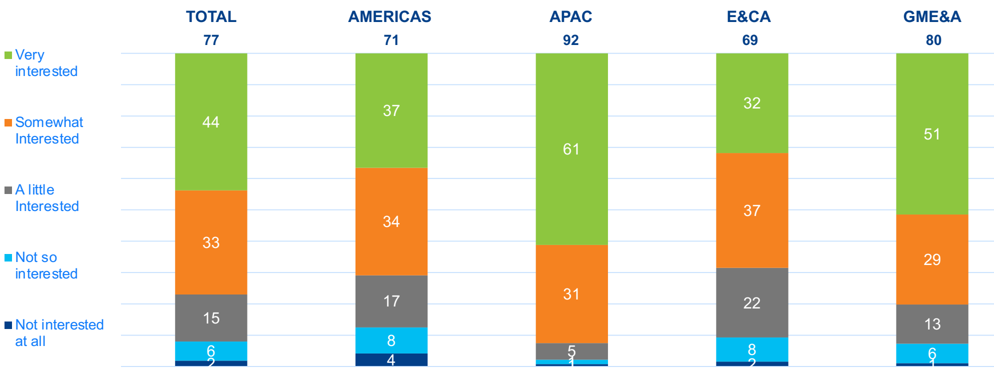
5. Transparency is key

Quality and safety are important to consumers everywhere. Interest in the cheese production process and a preference for natural ingredients are also high. Interest in production is notably strong in Asia Pacific, with 61% of participants saying they are “very interested”. At country level, India (96%), China (89%) and South Africa and Brazil (both 83%) express the strongest interest in cheese production.

Ingredients and provenance emerge as the most important production factors, particularly in Asia Pacific (with 79% saying they are interested). There is also a strong interest in heat treatments and sterile production in this region. At country level, India is particularly interested in ingredients, while China and Turkey show the strongest focus on sterile production.

As a medium for sharing such information, packaging is favoured more by Italy and China – although China’s most favoured media overall are video and social media, as is the case in India.

5. % Interest in cheese production



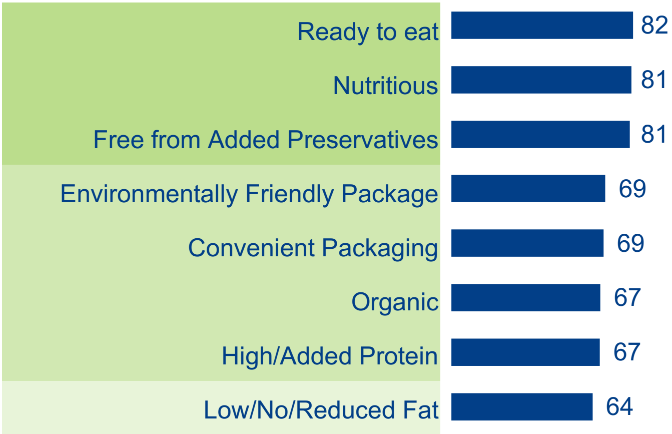
There is a striking level of interest in production everywhere, especially in Asia Pacific

6. Environmentally friendly packaging is valued

Environmentally friendly packaging matters to consumers in all the countries we surveyed. Globally, 69% feel it is relevant to them, placing it fourth as a desirable product attribute, after “ready to eat”, “nutritious” and “free from added preservatives”. It scores highest in Asia Pacific (81%) followed by Greater Middle East & Africa (76%). Individual country responses range from 85% in India, closely followed by Brazil, Turkey and China, with the lowest on 49%.

Convenient packaging also rates highly across countries. There is some variation in the perceived value of environmentally-friendly packaging depending on the cheese, with mozzarella scoring highest.

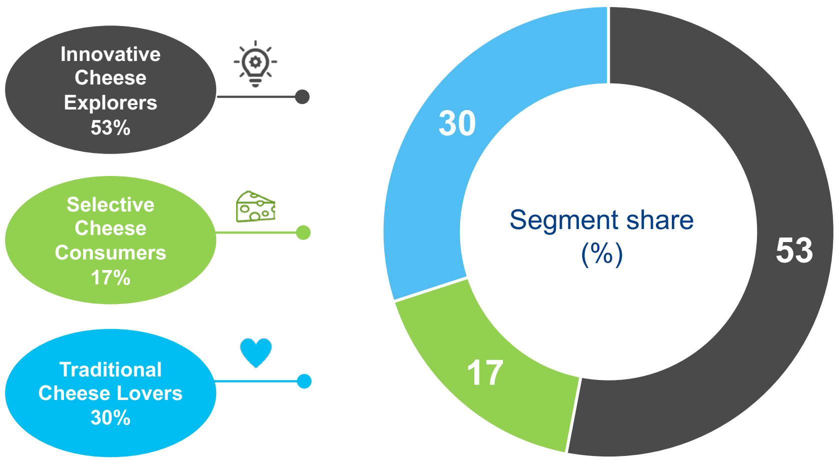
6. % Claims evaluation globally

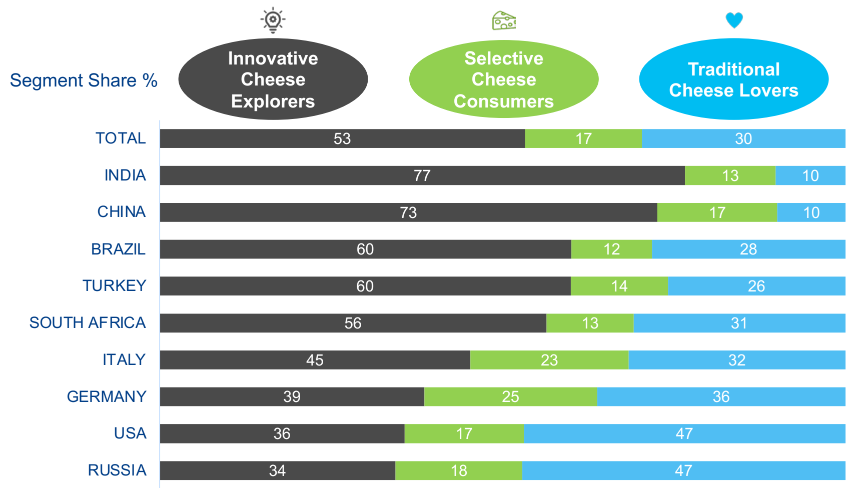


Environmental and convenient packaging attributes rate highly globally

Introducing the three types of cheese consumers

Based on the responses in our research study, we have divided the market into three segments





1. Innovative Cheese Explorers (53%)
Very fond of cheese, they like to search for innovations and novelties, to experiment with new tastes, flavours or textures and consequently consume a large variety of cheeses. They pay attention to how cheese is produced and are open to trying and buying new types of cheese, such as plant-based or cheeses with different flavours. This group is the largest overall, particularly dominating in India (77%) and China (73%).

2. Selective Consumers (17%)
This group consumes fewer types of cheese than the Innovative Explorers, but they purchase it very frequently. Even if more selective, they are interested in cheese characteristics and how it is produced, and are open to try something new, like plant-based cheese. This group is particularly strong in Germany (25%) and Italy (23%).

3. Traditional Cheese Lovers (30%)
This group is very traditional in their consumption, tending to mainly consume the same types of cheese, enjoying it both on its own and in recipes. They are less interested in the production process and are not really open to trying new things or experimenting. This is the largest group in the USA and Russia (both 47%).

"Cheese has been an essential part of our diet for centuries and it is set to remain so for many years to come. People are becoming more adventurous in terms of taste and texture, and we have the facility to accommodate this, ensuring that there is no compromise on the overall quality of the end result."

Fred Griemsmann, Vice President Cheese & Powder Systems, Tetra Pak

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