

MIDDLE EAST AND AFRICA

TRADITIONAL CULTURED MILK - A LONG-TIME FAVOURITE




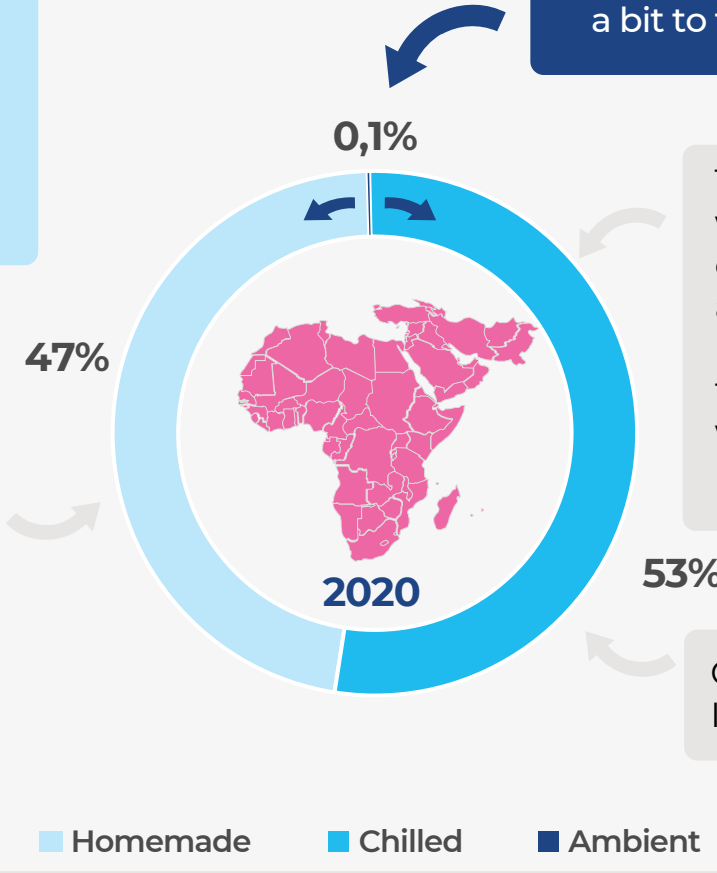
It's called Ayran, Doogh, Laban, Lassi, Rayeb, Ergo, Dahi, Lala, Mala and Maziwa among other things, and its taste and texture ranges from salty and thin to sweet and thick, depending on where you drink it. Middle Eastern and African consumers really enjoy their traditional cultured milk, but there are still plenty of opportunities for innovative producers. Have a look!

TOP 3 MARKET AREAS
 (Volume in litres 2020/growth rate 2020-2023)


- No. 1 Turkey & Iran** (2821/-0.3%)
- No. 2 West Africa** (1463/4.3%)
- No. 3 Arabia Area** (1304/2.4%)

A huge opportunity lies here.
 Stick to the tradition, but change it a bit to fit an out-of-home lifestyle.


 Homemade is mainly consumed in West Africa, Turkey, Pakistan and East Africa.



There is room for innovation when it comes to traditional cultured milk. Prepared for ambient distribution it can be consumed anywhere. And flavoured it can suit children who are not as traditional regarding taste.



Chilled is mainly consumed in Iran, Turkey and Arabia Area.



TRADITIONAL CULTURED MILK VOLUME

7.281 B LITRES

	Homemade	Chilled	Ambient
Growth rate (CAGR) 20-23	2.74%	1.04%	1.26%



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DRINKING YOGHURT - A NEW HEALTHY INDULGENCE

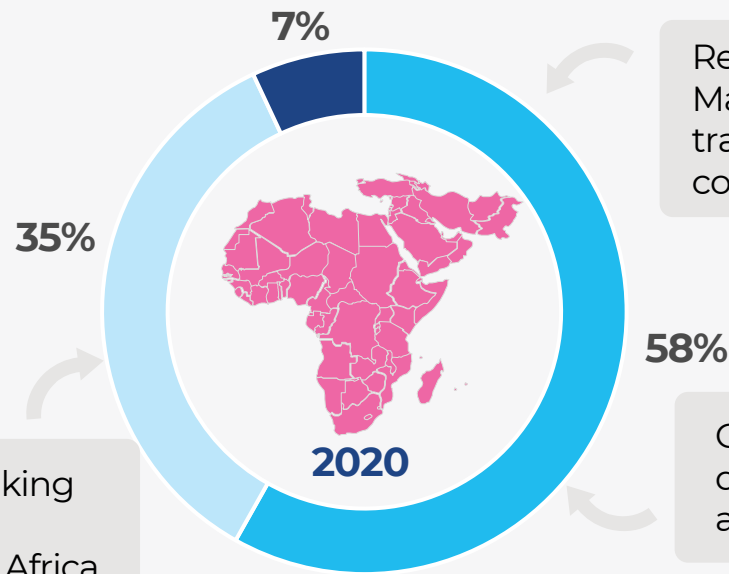
Drinking yoghurt has also proven to be a success in this region – a fast growing one! People enjoy it on many different occasion during the day. For breakfast. To refuel between meals. As a healthy indulgence in the evening. At home and on the go. The volume is not as large as the traditional fermented milk – yet. But prepared for ambient distribution, it has potential to reach consumers all across the region. And there's plenty of them.

Ambient distribution is relatively new but foreseen to grow fast.

A huge opportunity lies here.
Stick to the tradition, but change it a bit to fit a busy lifestyle.

TOP 3 MARKET AREAS
(Volume M litres 2020/ growth rate 2020-2023)

- No. 1 East Africa** (568/6.8%)
- No. 2 Maghreb** (513/3.2%)
- No. 3 West Africa** (224/8.3%)



Refrigeration is a barrier. Made ambient, this could be transported anywhere, and consumed on-the-go.

Chilled distribution is dominating Maghreb and West Africa.

DRINKING YOGHURT VOLUME



Homemade drinking yoghurt is more common in East Africa.

**1.426
B LITRES**

	Homemade	Chilled	Ambient
Growth rate (CAGR) 20-23	4.38%	6.58%	9.04%

The opportunity lies here

SUCCESS STORY

NIGERIA + DRINKING YOGHURT = TRUE



When the Hollandia brand launched the first ambient drinking yoghurt in Nigeria in 2005, they really filled a gap in people's lives. Finally, it was possible to have a tasty, healthy snack and store it in room temperature. Between 2013 and 2018 Hollandia experienced strong double-digit growth.

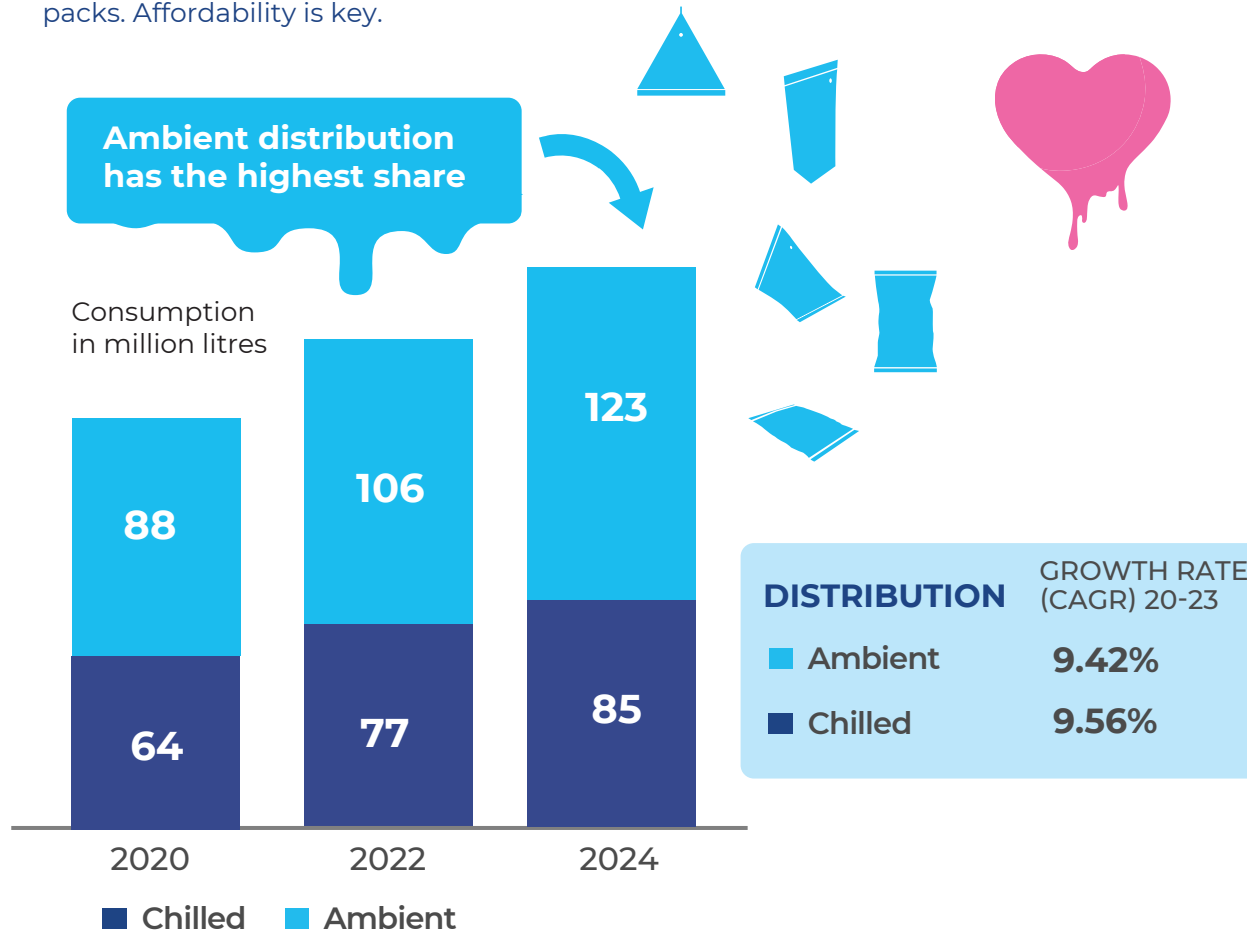
The convenient, hygienic, aseptic packaging made Hollandia yoghurt such a winner and allowed the introduction of multiple pack sizes, including portion packs. Affordability is key.



Why do you like yoghurt?

- It's sweet
- The taste is appealing
- It gives strength/energy

Ambient distribution has the highest share



Yoghurt is very popular with kids

Which of the following do you like?

