

Asia Pacific Dairy Products Market By Product Type (Milk, Cheese, Butter, Dairy Desserts, Yogurt, and Others), By Sales Channel (Supermarkets/Hypermarkets, Convenience Stores, Online, and Others), By Region, By Competition Forecast & Opportunities, 2018-2028F

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Abstracts

Asia Pacific Dairy Products Market has valued at USD 202.2 billion in 2022 and is anticipated to project robust growth in the forecast period with a CAGR of 4.15% through 2028. The Asia-Pacific dairy products market is a dynamic and rapidly evolving sector within the global dairy industry. This region encompasses diverse countries with varying dietary preferences and cultural influences, making it a complex yet lucrative market for dairy products.

The Asia-Pacific dairy products market is one of the largest and fastest-growing in the world. The region's large and growing population, increasing disposable incomes, and shifting dietary patterns are driving the demand for dairy products. In recent years, the market has witnessed robust growth, and this trend is expected to continue.

The Asia-Pacific dairy market offers a wide range of products, including milk, yogurt, cheese, butter, cream, and various dairy-based beverages. These products cater to different consumer preferences and cultural contexts, making the market highly diverse.

Consumer preferences in the Asia-Pacific region vary significantly from country to country. For example, dairy consumption in India is dominated by milk and traditional dairy products like yogurt and ghee, while countries like Japan and South Korea have a strong preference for yogurt and dairy beverages. Understanding these preferences is

crucial for dairy companies operating in the region.

There is a growing awareness of health and wellness in the Asia-Pacific region, leading to increased demand for functional dairy products like probiotic yogurt and low-fat milk. Consumers are seeking dairy products that offer specific health benefits, such as improved digestion and enhanced immunity.

Rapid urbanization in many Asia-Pacific countries has led to changes in lifestyle and dietary habits. The shift from traditional markets to modern retail channels, such as supermarkets and convenience stores, has facilitated easier access to dairy products for urban consumers.

Lactose intolerance is prevalent in some Asian populations, affecting the consumption of dairy products. This has prompted the development of lactose-free and dairy alternatives in the region. Additionally, the dairy supply chain in some countries faces challenges related to infrastructure, transportation, and storage. Ensuring the availability of fresh dairy products can be a logistical challenge. Furthermore, different countries have varying regulations and standards for dairy products, making it essential for companies to navigate complex regulatory landscapes.

Dairy alternatives like soy milk and almond milk are gaining popularity among consumers seeking plant-based options, presenting competition to traditional dairy products. Additionally, there is significant room for product innovation, including the development of dairy-based snacks, fortified dairy products, and premium dairy offerings.

In conclusion, the Asia-Pacific dairy products market is a diverse and rapidly expanding sector driven by changing consumer preferences, urbanization, and a growing focus on health and wellness. While it comes with its set of challenges, it also offers numerous opportunities for dairy companies to innovate, diversify their product offerings, and tap into the region's growing demand for dairy products.

Key Market Drivers

Shifting Dietary Preferences and Rising Income Levels

One of the primary drivers of the Asia-Pacific dairy products market is the changing dietary preferences of consumers across the region. As income levels rise and lifestyles become more urbanized, there is a notable shift in dietary habits. Traditionally, many

Asian countries had diets that were largely plant-based, with limited consumption of dairy products. However, as disposable incomes increase, there is a growing inclination toward a Western-style diet that includes a higher consumption of dairy products.

Consumers in countries like China and India, with their booming middle-class populations, are increasingly incorporating dairy into their diets. Milk, yogurt, cheese, and butter are becoming staples in many households, driven by the perception of dairy as a source of essential nutrients like calcium and protein. This shift in dietary preferences has created a substantial market for dairy products in the Asia-Pacific region.

Health and Wellness Trends

The rising awareness of health and wellness is another significant driver of growth in the Asia-Pacific dairy products market. Consumers are becoming more health-conscious, seeking products that not only provide taste but also offer functional benefits. Dairy products, known for their nutritional value, are well-positioned to meet these consumer demands.

Probiotic-rich yogurts and fermented dairy products are gaining popularity due to their perceived health benefits. These products are believed to promote gut health, boost immunity, and aid in digestion. Additionally, there is a growing interest in low-fat and low-sugar dairy options as consumers become more mindful of calorie intake and sugar content.

Furthermore, the aging population in several Asian countries has fueled the demand for dairy products fortified with vitamins and minerals that support bone health and overall well-being. As a result, dairy companies are increasingly investing in research and development to create dairy products that cater to specific health needs, capitalizing on the wellness trend in the Asia-Pacific region.

Evolving Trade Dynamics and International Expansion

The Asia-Pacific dairy products market has seen significant changes in trade dynamics and international expansion. On one hand, countries like New Zealand and Australia have leveraged their dairy industries to become major players in global dairy exports, supplying dairy products to markets in Asia and beyond. This has been facilitated by trade agreements and improved logistics, allowing for the efficient export of dairy goods.

On the other hand, Asian countries themselves are looking to expand their dairy industries and reduce reliance on imports. Governments in countries like China and India have been actively promoting domestic dairy production to meet the growing demand for dairy products. This includes investments in dairy farming infrastructure, breeding programs, and the development of dairy processing capabilities.

Moreover, international dairy companies are increasingly establishing a presence in the Asia-Pacific region. They are setting up production facilities, forming partnerships with local dairy players, and tailoring their product offerings to cater to the unique tastes and preferences of Asian consumers. This internationalization of dairy companies has contributed to the diversification of dairy product choices available in the region.

Key Market Challenges

Changing Dietary Preferences and Lactose Intolerance

One of the foremost challenges facing the Asia-Pacific dairy products market is the shifting dietary preferences of consumers. Traditionally, dairy has been an essential part of many Asian diets, particularly in countries like India, China, and Japan. However, as urbanization, globalization, and increased exposure to Western dietary patterns have become prevalent, there has been a noticeable change in consumption habits.

Lactose intolerance is a significant factor driving this shift. A significant portion of the Asian population is lactose intolerant, meaning they have difficulty digesting lactose, the sugar found in milk and dairy products. This has led to a growing demand for lactose-free and plant-based dairy alternatives such as soy milk, almond milk, and coconut milk.

Supply Chain and Infrastructure Challenges

The vast geographical expanse of the Asia-Pacific region presents unique supply chain and infrastructure challenges for the dairy industry. While some countries, like New Zealand and Australia, are major dairy exporters, others in the region struggle with inadequate infrastructure, inefficient transportation networks, and supply chain bottlenecks.

Cold chain logistics for dairy products are especially critical due to the need to maintain product freshness and safety. Ensuring consistent access to refrigerated storage and transportation facilities across the region remains a challenge, particularly in rural and less developed areas.

Additionally, cross-border trade complexities and varying regulatory requirements among Asian countries can hinder the smooth flow of dairy products within the region. This presents challenges for international dairy companies looking to expand their market presence.

Quality and Safety Concerns

Quality and safety concerns are paramount in the Asia-Pacific dairy products market. Several high-profile food safety incidents involving dairy products have eroded consumer trust and prompted governments to tighten regulations. Ensuring product quality, traceability, and safety is not only a challenge but also a necessity for dairy producers and regulators.

Food safety regulations vary from country to country within the region, and compliance can be complex for multinational dairy companies. The need to meet diverse regulatory standards requires a significant investment in quality control and assurance measures.

Counterfeiting and adulteration are ongoing issues that impact dairy products, particularly in countries like China. Counterfeit or substandard dairy products not only pose health risks to consumers but also undermine the reputation of legitimate dairy producers.

Opportunities for Growth and Innovation

While the Asia-Pacific dairy products market faces these challenges, it also presents substantial opportunities for growth and innovation. The region's large and increasingly affluent population continues to create a growing demand for dairy products, including milk, yogurt, cheese, and butter.

Innovation in product development is a key avenue for dairy companies. This includes the development of functional dairy products such as probiotic yogurts, fortified milk, and protein-enriched products that cater to health-conscious consumers.

Investment in dairy processing technology is another opportunity. Efficient and sustainable processing technologies can help address supply chain challenges and reduce waste in dairy production.

Diversification into value-added products such as dairy-based desserts, ready-to-eat

meals, and dairy snacks can capture consumer interest and boost revenues.

Moreover, sustainability is becoming increasingly important in the dairy industry. Companies that adopt eco-friendly practices, reduce greenhouse gas emissions, and focus on animal welfare can gain a competitive edge and meet the evolving expectations of consumers in the Asia-Pacific region.

Key Market Trends

Rising Demand for Health and Wellness Products

One of the most prominent trends in the Asia-Pacific dairy products market is the growing demand for health and wellness-focused dairy products. As consumers become increasingly health-conscious, there is a shift towards dairy items that offer functional and nutritional benefits. This trend is driven by factors such as:

Awareness of Nutritional Benefits: Consumers are becoming more aware of the nutritional benefits of dairy products, including their high protein content, calcium, and vitamins. This awareness has led to increased consumption of dairy products for better bone health, muscle growth, and overall well-being.

Functional Dairy Products: The market is witnessing a surge in demand for functional dairy products such as probiotic yogurt, kefir, and dairy-based beverages enriched with vitamins, minerals, and other bioactive compounds. These products are marketed for their digestive health benefits, immunity-boosting properties, and weight management features.

Plant-Based Alternatives: While traditional dairy products remain popular, there is also a growing interest in plant-based dairy alternatives such as almond milk, soy yogurt, and oat-based dairy substitutes. These products cater to lactose-intolerant consumers, vegans, and those seeking dairy-free options for health reasons.

Clean Label and Natural Ingredients: Consumers in the Asia-Pacific region are increasingly looking for dairy products with clean labels, minimal additives, and natural ingredients. This trend aligns with the preference for wholesome and minimally processed foods.

Premium and Fortified Products: Premium dairy products, including organic and grass-fed options, are gaining traction among consumers willing to pay a premium for higher

quality. Additionally, fortified dairy products with added vitamins, minerals, and omega-3 fatty acids are becoming popular for their health-enhancing properties.

E-Commerce and Digital Transformation

The Asia-Pacific dairy products market is experiencing a significant shift towards e-commerce and digitalization. This trend is driven by factors such as:

Online Retail Platforms: E-commerce platforms have become a preferred channel for consumers to purchase dairy products. The convenience of online shopping, coupled with a wide range of product choices, has fueled the growth of online dairy sales.

Direct-to-Consumer (DTC) Models: Some dairy producers are adopting DTC models, allowing them to establish a direct relationship with consumers. This approach enables personalized marketing, product customization, and greater control over distribution.

Digital Marketing: Dairy companies are leveraging digital marketing and social media platforms to engage with consumers, share nutritional information, and promote their products. Influencer marketing and online advertising play a crucial role in reaching a wider audience.

Supply Chain Optimization: Digitalization is enhancing supply chain efficiency, enabling better inventory management, tracking, and distribution. This ensures that dairy products reach consumers in optimal condition and with reduced wastage.

Data Analytics: Dairy companies are harnessing data analytics and artificial intelligence to gain insights into consumer preferences, demand patterns, and market trends. This data-driven approach helps in product development and marketing strategies.

Sustainable and Ethical Practices

Sustainability and ethical considerations are gaining prominence in the Asia-Pacific dairy products market. Consumers are increasingly concerned about the environmental and ethical impact of dairy production. Key aspects of this trend include:

Eco-Friendly Packaging: Dairy companies are adopting sustainable packaging materials and practices to reduce plastic waste and environmental impact. This includes the use of recyclable packaging and the promotion of responsible disposal.

Animal Welfare: Ethical considerations extend to animal welfare practices within the dairy industry. Consumers are seeking assurance that dairy products are produced in a humane and cruelty-free manner.

Local Sourcing: There is a preference for locally sourced dairy products, as they are perceived as having a lower carbon footprint and supporting local communities.

Sustainability Certifications: Many dairy producers are obtaining sustainability certifications, such as organic and fair-trade certifications, to demonstrate their commitment to ethical and sustainable practices.

Reduced Food Waste: Efforts to reduce food waste in the dairy supply chain are becoming more pronounced. This includes strategies to minimize spoilage and the use of unsold dairy products in innovative ways.

Segmental Insights

Type Insights

Milk, often referred to as the 'white gold' of the dairy industry, plays a pivotal role in the Asia-Pacific Dairy Products Market, commanding a significant share and serving as a cornerstone of the region's dairy sector. This vast and diverse market encompasses a wide range of dairy products, including milk, cheese, yogurt, butter, and more. Among these, milk stands out as a fundamental and versatile product with widespread consumption across the Asia-Pacific region.

Cultural Significance: Milk has deep cultural roots in many countries across the Asia-Pacific region. It is a staple in traditional diets and cuisines, often used in various forms, such as fresh milk, fermented milk products, and dairy-based sweets. In countries like India, Pakistan, and Sri Lanka, milk has cultural and religious significance, playing a central role in rituals and festivals.

Growing Population: The Asia-Pacific region is home to a significant portion of the world's population, with a growing middle-class segment. As incomes rise, consumers seek higher-quality diets, including dairy products. Milk, as a source of essential nutrients like calcium and protein, is an integral part of this dietary shift.

Urbanization: Rapid urbanization in many Asia-Pacific countries has led to changes in dietary preferences. Urban consumers often incorporate more dairy products into their

diets due to convenience and the availability of a wider range of dairy-based options.

Nutritional Benefits: Milk is highly regarded for its nutritional content. It provides essential vitamins, minerals, and proteins, making it a vital component of balanced diets, especially for children, pregnant women, and the elderly.

Diverse Dairy Products: The versatility of milk as an ingredient enables the production of various dairy products. From fresh milk to yogurt, cheese, and condensed milk, the dairy industry offers a diverse array of options to cater to different tastes and preferences.

Health and Wellness Trends: As consumers become more health-conscious, milk's reputation as a natural and nutritious beverage aligns with the growing demand for wholesome and functional foods. Fortified and specialty milk products cater to health and wellness trends.

Food Industry Applications: Milk is an essential ingredient in the food industry, used in the production of baked goods, confectionery, beverages, and dairy-based snacks. Its functional properties contribute to the texture, taste, and nutritional profile of many processed foods.

Dairy Farming and Supply Chain: The Asia-Pacific region has a significant dairy farming sector, with countries like India and New Zealand being major milk producers. A well-established supply chain ensures the availability of milk and dairy products in both urban and rural areas.

Export Opportunities: Several countries in the Asia-Pacific region are major exporters of dairy products, including milk powder and dairy ingredients. This export potential further underscores the significance of milk in the regional dairy market.

In conclusion, milk holds a substantial share in the Asia-Pacific Dairy Products Market due to its cultural importance, nutritional benefits, versatility, and its role as a foundational ingredient in various dairy products. As the region continues to experience population growth, urbanization, and evolving dietary preferences, milk is expected to maintain its central position in the diet and food industry of the Asia-Pacific countries.

Sales Channel Insights

The Asia-Pacific Dairy Products Market has witnessed a remarkable transformation in

recent years, with the online sales channel emerging as a significant player in this dynamic industry. The dairy sector in the Asia-Pacific region is vast and diverse, encompassing a wide range of products such as milk, cheese, yogurt, butter, and more. Traditionally, these products were primarily distributed through conventional brick-and-mortar retail channels, including supermarkets, hypermarkets, and local dairy stores. However, the rapid growth of e-commerce and online retail platforms has brought about a substantial shift in consumer buying patterns and market dynamics.

The rise of e-commerce in the Asia-Pacific region can be attributed to several factors. Firstly, the region has experienced a surge in internet penetration and smartphone adoption, making online shopping more accessible to a larger population. Additionally, changing consumer lifestyles, particularly in urban areas, have led to increased demand for convenient shopping options.

One of the key drivers of the online sales channel's significant share in the Asia-Pacific Dairy Products Market is the convenience it offers to consumers. Shoppers can browse through a wide variety of dairy products, compare prices, read reviews, and place orders from the comfort of their homes. This convenience is particularly appealing to urban consumers with busy lifestyles.

Online platforms provide an extensive array of dairy products from various brands and regions, giving consumers access to a broader selection than what may be available in local stores. This variety allows consumers to explore new products and brands, driving market growth and competition.

Online retailers often offer doorstep delivery services, ensuring that dairy products are delivered fresh and in a timely manner. This is especially important for products like milk and yogurt, which have a limited shelf life.

E-commerce platforms frequently run promotions, discounts, and loyalty programs that attract price-sensitive consumers. These incentives encourage shoppers to make bulk purchases or try new products, contributing to increased sales.

Online platforms also serve as valuable sources of information. Consumers can access detailed product descriptions, nutritional information, and user reviews, helping them make informed choices about the dairy products they purchase.

Maintaining the cold chain during transportation is crucial for dairy products' freshness and safety. Online retailers must invest in robust logistics and delivery systems to

ensure products reach customers in optimal condition. Additionally, ensuring the quality and safety of dairy products during storage and transit is essential. This requires rigorous quality control measures and adherence to food safety regulations. Furthermore, while e-commerce is booming in urban areas, it may still face challenges in reaching rural and remote regions where internet access and delivery infrastructure may be limited.

The online dairy products market is highly competitive, with numerous players vying for market share. To succeed, companies must differentiate themselves through product quality, pricing, and customer service.

In conclusion, the online sales channel has undeniably carved out a significant share in the Asia-Pacific Dairy Products Market. Its growth has been driven by factors such as convenience, accessibility, product variety, doorstep delivery, and promotional incentives. As e-commerce continues to evolve and expand, it is expected to play an increasingly influential role in shaping the dairy products industry across the Asia-Pacific region.

Regional Insights

China holds a prominent and substantial share in the Asia-Pacific Dairy Products Market, making it a pivotal player in the regional dairy industry. This dominance can be attributed to a combination of factors that have propelled China to the forefront of dairy production, consumption, and trade within the Asia-Pacific region.

Robust Domestic Demand: China boasts a massive population, and as its economy continues to grow, so does the demand for dairy products. Rising incomes and changing dietary preferences have led to an increased consumption of dairy, including milk, yogurt, cheese, and butter. This surge in domestic demand has had a significant impact on the Asia-Pacific dairy market, with China being a major contributor.

Diverse Product Portfolio: China's dairy industry has diversified its product offerings to cater to a wide range of consumer preferences. This includes traditional dairy products like milk and yogurt, as well as innovative dairy-based products such as probiotic beverages, flavored yogurts, and specialty cheeses. The diverse product portfolio has helped capture various segments of the market.

Investment in Dairy Infrastructure: China has made substantial investments in dairy infrastructure, including modern dairy farms, processing facilities, and distribution

networks. These investments have not only increased domestic production capacity but also improved the quality and safety of dairy products.

Importance of Dairy in the Diet: Dairy products have become increasingly important in Chinese diets due to their nutritional value. As consumers become more health-conscious, dairy is perceived as a source of essential nutrients, such as calcium and protein. This trend has further boosted the demand for dairy products in the country.

International Trade: China has emerged as a significant player in international dairy trade. It is both a major importer and exporter of dairy products. China imports dairy products, such as milk powder, to meet domestic demand, while also exporting processed dairy goods to neighboring countries in the Asia-Pacific region.

Investment in Research and Development: China has made strides in dairy research and development, leading to advancements in product innovation and quality. This has enabled the country to produce dairy items that cater to the preferences and dietary requirements of its diverse consumer base.

Challenges and Opportunities: Despite its significant share, China's dairy industry faces challenges, including concerns about food safety and sustainability. These challenges present opportunities for further growth, as the industry works to enhance quality control and sustainability practices.

Key Market Players

Gujarat Cooperative Milk Marketing Federation Ltd. (GCMMF)

Yili Group

Nestle SA

Yakult Honsha Co., Ltd.

Meiji Holdings Company, Ltd.

Mother Dairy Fruit & Vegetable Pvt. Ltd.

Dean Foods Company

The Kraft Heinz Company

Bright Dairy & Food Co., Ltd.

Fonterra Co-operative Group Limited

Report Scope:

In this report, the Asia Pacific dairy products market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Asia Pacific Dairy Products Market, By Product Type:

Milk

Cheese

Butter

Dairy Desserts

Yogurt

Others

Asia Pacific Dairy Products Market, By Sales Channel:

Supermarkets/Hypermarkets

Convenience Stores

Online

Others

Asia Pacific Dairy Products Market, By Country:

China

Japan

India

South Korea

Australia

Indonesia

Singapore

Vietnam

Malaysia

Thailand

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Asia Pacific dairy products market.

Available Customizations:

Asia Pacific Dairy Products Market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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