

India Dairy Alternatives Market By Type (Milk, Butter, Yogurt, Cheese, Others (Ice Cream, Cream, Tofu, Smoothies, etc.)), By Formulation (Unsweetened and Sweetened), By Source (Soy, Coconut, Almond, Others (Rice, Oats, Hemp, Walnut, Hazelnut, Cashew, etc.)), By Sales Channel (Supermarkets/Hypermarkets, Convenience Stores, Online, Others (Specialty Stores, Pharmacies, Direct Sales, etc.)), By Region, By Competition Forecast & Opportunities, 2019-2029F

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Abstracts

India Dairy Alternatives Market has valued at USD 96.99 million in 2023 and is anticipated to project robust growth in the forecast period with a CAGR of 11.51% through 2029. The India Dairy Alternatives Market is experiencing a significant surge in popularity and growth as an increasing number of consumers seek dairy-free options for various reasons, including dietary preferences, health concerns, and environmental sustainability. This market encompasses a wide array of plant-based products that are designed to mimic traditional dairy items while offering numerous benefits.

The India Dairy Alternatives Market boasts a diverse range of products, including plant-based milk alternatives (such as almond milk, soy milk, and coconut milk), yogurt, cheese, ice cream, and butter. These alternatives are created from a variety of plant sources, such as almonds, soybeans, coconuts, oats, and cashews, allowing consumers to choose options that align with their dietary preferences and requirements.

An increasing number of consumers in India are turning to dairy alternatives due to health considerations. Many individuals are lactose intolerant or have dairy allergies,

making dairy alternatives a crucial part of their diet. Additionally, plant-based dairy alternatives are often lower in saturated fats and free from cholesterol, making them attractive to health-conscious consumers.

The growing popularity of veganism and plant-based diets has been a major driver of the dairy alternatives market in India. People following these diets opt for plant-based dairy alternatives to replace traditional dairy products. The ethical and environmental concerns associated with animal agriculture have also contributed to the rise of veganism.

Lactose intolerance is prevalent in India, and a substantial portion of the population experiences discomfort or digestive issues when consuming dairy products. This has prompted many to seek lactose-free options in the form of dairy alternatives.

Concerns about the environmental impact of dairy production, including greenhouse gas emissions, land use, and water consumption, have led environmentally conscious consumers to explore dairy alternatives. Plant-based options often have a smaller ecological footprint, aligning with sustainability goals.

The dairy alternatives market is characterized by constant product innovation. Manufacturers are developing innovative dairy-free products that closely mimic the taste and texture of traditional dairy. This focus on product quality and taste has expanded the appeal of dairy alternatives to a wider consumer base.

In conclusion, the India Dairy Alternatives Market is flourishing as consumers increasingly seek dairy-free options driven by health concerns, dietary preferences, environmental considerations, and ethical beliefs. The market's diverse product range, health-conscious consumer base, and growing market competition make it a dynamic and evolving sector within the broader food industry in India. As consumers continue to explore and adopt dairy alternatives, the market is expected to see sustained growth and innovation in the coming years.

Key Market Drivers

Shifting Consumer Preferences

Changing consumer preferences and dietary choices are one of the primary drivers behind the growth of the dairy alternatives market in India. There is a noticeable shift towards plant-based diets, vegetarianism, and veganism. Many consumers are

becoming more health-conscious, environmentally aware, and animal welfare-oriented. As a result, they are looking for alternatives to traditional dairy products, which often contain saturated fats and cholesterol.

Plant-based dairy alternatives offer a solution for individuals seeking to reduce or eliminate their dairy consumption. Products like almond milk, soy milk, coconut milk, and oat milk provide the creamy texture and nutritional benefits of dairy without the associated health concerns. Additionally, these alternatives are often fortified with vitamins and minerals, making them an attractive choice for those looking to maintain a balanced diet.

The rise of lactose intolerance and dairy allergies also contributes to the demand for dairy alternatives. A significant portion of the Indian population is lactose intolerant, and dairy alternatives offer a viable option for individuals seeking relief from digestive discomfort caused by dairy consumption.

Health and Wellness Trends

The growing emphasis on health and wellness is another key driver of the dairy alternatives market in India. Consumers are increasingly mindful of the impact of their food choices on their overall health. They are looking for dairy alternatives that align with their health goals, such as weight management, reduced cholesterol intake, and improved digestion.

Plant-based dairy alternatives are often perceived as healthier choices due to their lower saturated fat content and the absence of cholesterol. Additionally, many dairy alternatives are fortified with vitamins and minerals, such as calcium and vitamin D, to match the nutritional value of dairy milk. These factors make dairy alternatives an attractive option for health-conscious consumers.

Furthermore, the presence of chronic health conditions like heart disease and diabetes in India has encouraged individuals to explore dietary changes, including the incorporation of dairy alternatives. The market has responded with an array of products that cater to specific health needs, such as low-sugar, low-calorie, and high-protein dairy alternatives.

Environmental and Ethical Concerns

Concerns about the environmental impact and ethical considerations related to dairy

production have driven many consumers to opt for dairy alternatives. Traditional dairy farming can be resource-intensive, leading to deforestation, water depletion, and greenhouse gas emissions. In India, where agriculture is a significant contributor to the economy, these concerns have resonated strongly with environmentally conscious consumers.

The dairy alternatives market aligns with sustainable and ethical consumer choices. Many plant-based milk and dairy products are perceived as more environmentally friendly because they often have a lower carbon footprint and reduce the demand for water and land resources compared to conventional dairy farming. This environmental consciousness has particularly gained traction among younger consumers and urban populations.

Additionally, ethical concerns about animal welfare have prompted many consumers to seek dairy alternatives. Veganism, which excludes all animal products, is a growing movement in India, especially among younger generations. The desire to avoid supporting industries that involve animal exploitation has led individuals to explore dairy alternatives that offer a cruelty-free option without compromising on taste and nutrition.

Key Market Challenges

Market Education and Awareness

One of the foremost challenges in the India Dairy Alternatives Market is the need for extensive market education and awareness. Despite the growing popularity of dairy alternatives, there is still a substantial section of the population that remains unaware of these products, their benefits, and the variety available. The dairy industry has a long-established presence, and traditional dairy products are deeply ingrained in Indian diets and culinary traditions.

Consumer Knowledge: Many consumers are unfamiliar with the different dairy alternatives like almond milk, soy milk, coconut milk, and oat milk. Educating consumers about the nutritional benefits, usage in recipes, and environmental advantages of these products is essential.

Nutritional Awareness: Another challenge is dispelling misconceptions or concerns related to the nutritional content of dairy alternatives. Consumers need to be informed about how these products can be excellent sources of vitamins, minerals, and proteins without the drawbacks of dairy, such as lactose intolerance or cholesterol.

Market Diversity: The market for dairy alternatives is not homogeneous, and products can significantly vary in terms of ingredients, processing methods, and quality. Consumers need education about how to differentiate and choose products based on their dietary preferences and health needs.

Taste and Palatability

Taste and palatability remain a significant challenge in the India Dairy Alternatives Market. Traditional dairy products, such as milk and yogurt, have distinctive flavors and textures that consumers have grown accustomed to over generations. To compete effectively, dairy alternatives must match or exceed the sensory experience provided by their dairy counterparts.

Product Development: Developing dairy alternatives that not only mimic but also improve upon the taste and texture of traditional dairy is a significant challenge. Achieving the creaminess of dairy milk in plant-based milk, or the tanginess of yogurt in dairy-free yogurt, can be complex and requires innovation in ingredient selection and processing.

Cultural Adaptation: India is a diverse country with a wide range of culinary traditions and regional tastes. Adapting dairy alternatives to suit these diverse preferences can be a challenge, as consumers from different regions may have specific expectations regarding flavor profiles and product usage.

Consumer Acceptance: Convincing consumers to switch from traditional dairy products to dairy alternatives can be challenging. Many consumers are initially hesitant to try new products, especially when there is a perception that dairy alternatives may not taste as good as traditional dairy.

Supply Chain and Price Competitiveness

The dairy alternatives market also faces challenges related to supply chain efficiency and price competitiveness. Ensuring a consistent supply of high-quality ingredients and products at competitive prices is crucial for market growth.

Sourcing Raw Materials: A significant portion of dairy alternatives relies on plant-based ingredients like almonds, soybeans, and oats. Sourcing these raw materials sustainably and efficiently can be a logistical challenge. Fluctuations in raw material prices and

availability can impact production costs.

Processing Facilities: Establishing and maintaining processing facilities for dairy alternatives that meet hygiene and quality standards is another challenge. Ensuring that products are produced and distributed efficiently without compromising on taste and quality can be resource-intensive.

Price Competition: Traditional dairy products are often available at competitive prices due to economies of scale in the dairy industry. Dairy alternatives, which may rely on smaller-scale production, can be perceived as more expensive. Making dairy alternatives cost-competitive while maintaining product quality is a significant challenge.

Consumer Expectations: Indian consumers are often price-sensitive, and this impacts their choices in the grocery store. Convincing consumers to consider dairy alternatives at a slightly higher price point can be a hurdle, particularly when many traditional dairy products are readily available and affordable.

Key Market Trends

Surging Demand for Plant-Based Alternatives

One of the most prominent trends in the India Dairy Alternatives Market is the surging demand for plant-based alternatives. Consumers are increasingly turning to plant-based milk, yogurt, and cheese as substitutes for traditional dairy products. This trend is fueled by several factors:

Health and Wellness: Many consumers are making a conscious effort to adopt healthier diets. Plant-based dairy alternatives are often perceived as healthier choices, as they are typically lower in saturated fats and can be fortified with essential nutrients such as vitamins and minerals.

Lactose Intolerance and Allergies: A significant portion of the population in India is lactose intolerant or has dairy allergies. Plant-based alternatives offer a suitable solution for these individuals, allowing them to enjoy similar dairy experiences without discomfort.

Ethical and Environmental Concerns: Growing awareness of the environmental impact of traditional dairy production, including greenhouse gas emissions and land use, is prompting consumers to shift towards more sustainable options. Plant-based dairy

alternatives have a lower environmental footprint, making them an attractive choice for environmentally conscious consumers.

Dietary Preferences: The rising trend of vegetarianism and veganism in India is another factor driving the demand for plant-based dairy alternatives. These consumers seek dairy-free options that align with their dietary choices and values.

Product Innovation and Diversification

Product innovation and diversification are reshaping the India Dairy Alternatives Market. To meet the growing demand for dairy alternatives, companies are introducing a wide range of innovative and unique products:

Diverse Milk Varieties: Beyond traditional almond and soy milk, manufacturers are exploring a variety of plant sources, including oats, rice, cashews, and even more exotic options like hemp and flax. These diverse milk varieties cater to different tastes and dietary preferences.

Fortification: To address nutritional concerns, many dairy alternative products are fortified with vitamins, minerals, and protein. Fortified products provide a nutritionally competitive alternative to traditional dairy.

Flavored and Functional Variants: Manufacturers are introducing flavored and functional dairy alternatives, including options with added probiotics, prebiotics, and unique flavors such as chocolate, vanilla, and fruit-infused varieties. These options offer consumers a broader choice and enhanced taste experiences.

Cheese Alternatives: Plant-based cheese alternatives are gaining popularity, with products that melt, stretch, and taste like traditional dairy cheese. These alternatives are used in various culinary applications, including pizzas, sandwiches, and appetizers.

E-commerce and Online Retail Expansion

The rise of e-commerce and online retail has significantly impacted the distribution of dairy alternatives in India. Here's how this trend is shaping the market:

Accessibility: E-commerce platforms have made dairy alternative products accessible to consumers across the country, including those in remote areas where traditional retail infrastructure may be limited.

Convenience: Online shopping offers convenience, allowing consumers to explore and purchase a wide range of dairy alternatives from the comfort of their homes. It eliminates the need for physical store visits, making it a preferred option for busy urban dwellers.

Product Diversity: E-commerce platforms often host a broader variety of dairy alternatives, including niche and specialty products. This diversity allows consumers to explore and discover new options beyond what might be available in traditional stores.

Consumer Education: Online platforms provide a space for manufacturers to educate consumers about the benefits, uses, and nutritional aspects of dairy alternatives. This educational component plays a crucial role in driving consumer adoption.

Direct-to-Consumer Models: Some dairy alternative brands are adopting direct-to-consumer models, selling their products through their websites. This approach allows them to maintain a direct connection with their customers and gather valuable feedback.

Segmental Insights

Type Insights

Milk, a traditional staple in the Indian diet, undeniably holds a significant share in the India Dairy Alternatives Market. This dominance is a testament to the country's longstanding dairy culture and the inherent demand for alternatives driven by dietary preferences, health concerns, and sustainability considerations.

Milk has deep cultural and culinary significance in India. It plays a central role in various traditional recipes, religious rituals, and daily consumption. Indian households have long relied on milk for making an array of dairy products like ghee, curd, paneer, and sweets. The association between milk and auspiciousness in Indian culture ensures a consistent demand for dairy alternatives that emulate the taste and texture of milk.

India is a diverse country with a wide range of dietary preferences, influenced by regional, religious, and personal choices. While dairy milk is a crucial element of many diets, the country is also home to a substantial vegetarian and vegan population. This diversity of dietary preferences has led to the growth of dairy alternatives as a suitable option for those who avoid or limit dairy consumption.

Lactose intolerance and dairy allergies are prevalent concerns in India, affecting a significant portion of the population. As a result, many individuals seek dairy alternatives to address these health issues. Products like lactose-free milk, soy milk, almond milk, and others provide a viable solution for those who cannot tolerate traditional dairy products.

The global trend toward health and wellness has also influenced dietary choices in India. Consumers are increasingly conscious of the health benefits of plant-based alternatives. Dairy alternatives often provide lower fat content, fewer calories, and cholesterol, making them attractive to health-conscious individuals. These products may also be fortified with vitamins and minerals, further enhancing their appeal.

Growing awareness of environmental issues, including the carbon footprint associated with dairy farming, has led to the exploration of more sustainable options. Plant-based dairy alternatives, such as almond, soy, or coconut milk, are often considered more environmentally friendly compared to conventional dairy production. This aligns with the sustainability goals of many consumers.

The dairy alternatives market in India is marked by a wide variety of products. Apart from the well-known soy, almond, and coconut milk, there are innovations that include cashew, oat, and rice-based alternatives. The diversity of choices ensures that consumers can select the dairy alternative that best suits their taste and nutritional requirements.

The urbanization of India has resulted in increased access to modern retail outlets, supermarkets, and e-commerce platforms. Dairy alternatives are prominently displayed and readily available in these retail settings. The convenience of finding these products in urban areas has further fueled their demand.

Both domestic and international companies have recognized the potential of the dairy alternatives market in India. Well-established brands as well as new entrants are offering a range of options, contributing to the growth of the market. These brands invest in marketing and product development to cater to the evolving preferences of Indian consumers.

Sales Channel Insights

In recent years, online platforms have gained a significant share in the India Dairy Alternatives Market, marking a transformation in how consumers access and purchase

dairy-free products. This shift in consumer behavior is driven by a combination of factors, including increased health consciousness, dietary preferences, and the convenience of e-commerce.

Growing health consciousness among Indian consumers has been a driving force behind the increased demand for dairy alternatives. Many people are opting for plant-based milk and dairy substitutes due to concerns about lactose intolerance, milk allergies, and the desire for a healthier lifestyle. The online marketplace provides a platform for consumers to access a wide range of dairy-free products, including almond milk, soy milk, and coconut milk, all of which are perceived as healthier alternatives to traditional dairy.

Dietary preferences have also played a significant role in the surge of online sales in the Dairy Alternatives Market. India has a diverse population with a variety of dietary needs and restrictions. Some consumers follow vegetarian or vegan diets, while others choose to avoid dairy for ethical or environmental reasons. Online platforms offer a convenient way for people with specific dietary preferences to find and purchase dairy-free products tailored to their needs.

Online platforms have enabled a vast selection of dairy alternative products to become readily available to consumers. Shoppers can explore a wide range of plant-based milk options, including almond, soy, rice, oat, and coconut milk, along with dairy-free alternatives to yogurt, cheese, and ice cream. This variety allows consumers to experiment with different flavors and textures, ultimately driving the growth of the dairy alternative market.

The convenience of online shopping has made it increasingly attractive to consumers. With just a few clicks, individuals can access a wide array of dairy-free options without having to visit multiple physical stores. This convenience is particularly appealing to urban dwellers and those with busy lifestyles who value time-saving solutions for their grocery needs.

Online platforms have played a vital role in educating consumers about the benefits of dairy alternatives. Through product descriptions, customer reviews, and informative articles, consumers can learn more about the nutritional advantages, taste profiles, and sustainability benefits of plant-based dairy alternatives. This educational aspect has empowered consumers to make informed choices and embrace dairy-free products.

The overall growth of e-commerce in India has significantly contributed to the expansion

of online sales in the Dairy Alternatives Market. Online retail platforms have seen a surge in user engagement and increased investments, leading to enhanced customer experiences, faster deliveries, and a wider reach to consumers in both urban and rural areas.

Online platforms provide a stage for dairy alternative brands to showcase their products and reach a broader audience. Brands can effectively promote their products through digital marketing, social media, and online advertising, which has contributed to the growth of the dairy alternatives market.

Regional Insights

The southern region of India has emerged as a key player in the India Dairy Alternatives Market, contributing significantly to the growing popularity of non-dairy milk and dairy-free products. This prominence is the result of a combination of factors, including changing dietary preferences, health consciousness, and the availability of a diverse range of dairy alternatives. Here's a closer look at why the South has a substantial share in this market.

The southern region of India boasts a rich and diverse culinary heritage, with a wide variety of vegetarian and plant-based dishes. This cultural backdrop has made the South more receptive to dairy alternatives, as these products can seamlessly integrate into traditional recipes and cater to regional tastes.

In recent years, there has been a surge in health-conscious consumers across India, and the South is no exception. Many individuals are turning to dairy alternatives due to concerns related to lactose intolerance, allergies, and dietary choices. The health benefits of non-dairy products, such as lower cholesterol and reduced saturated fat, make them a preferred choice for those looking to make healthier dietary decisions.

The southern states of India, particularly Karnataka and Tamil Nadu, are known for their agricultural diversity. This abundance of crops, including coconut, almonds, soybeans, and cashews, provides a ready supply of ingredients for the production of dairy alternatives. The local availability of these raw materials has fueled the growth of the dairy alternatives industry in the region.

The South has a rich tradition of using non-dairy ingredients in its cuisine. Coconut milk and coconut-based products have been an integral part of South Indian cooking for centuries. These traditional non-dairy options have paved the way for a seamless

transition to modern dairy alternatives.

The South has become a hub for innovation and entrepreneurship in the food and beverage industry, including dairy alternatives. Start-ups and food tech companies in cities like Bengaluru and Chennai are driving product development and introducing a variety of dairy-free options, from plant-based milk to vegan curd and ice cream.

Consumers in the South often have specific dietary preferences influenced by regional cuisines and traditions. These preferences have led to the development of region-specific dairy alternatives that cater to the unique tastes of the southern population.

The southern states, especially metropolitan areas like Bengaluru, Hyderabad, and Chennai, have witnessed rapid urbanization and changing lifestyles. With busy schedules and a desire for convenience, urban consumers are turning to dairy alternatives as a practical and nutritious option for their dietary needs.

The South, like the rest of India, is experiencing a growing focus on health and wellness. This trend has driven many consumers to explore dairy alternatives that align with their health and dietary goals.

Key Market Players

Blue Diamond Growers

Dabur India Ltd

Danone SA

Nestl? SA

ProSoya Foods

Raw Pressery

Sanitarium Health and Wellbeing Company

The Hershey Company

Dr. Oetker India Pvt Ltd.

Agro Tech Foods Limited (Sundrop)

Report Scope:

In this report, the India Dairy Alternatives market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

India Dairy Alternatives Market, By Type:

Milk

Butter

Yogurt

Cheese

Others

India Dairy Alternatives Market, By Formulation:

Unsweetened

Sweetened

India Dairy Alternatives Market, By Source:

Soy

Coconut

Almond

Others

India Dairy Alternatives Market, By Sales Channel:

Supermarkets/Hypermarkets

Convenience Stores

Online

Others

India Dairy Alternatives Market, By Region:

North

South

East

West

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the India dairy alternatives market.

Available Customizations:

India Dairy Alternatives 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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