

India Gluten-Free Products Market By Product Type (Bakery Products, Pizzas & Pastas, Cereals & Snacks, Savories, Desserts & Ice-creams and Others), By Source (Oilseeds & Pulses, Rice & Corn, Dairy & Meat Products and Others), By Sales Channel (Supermarkets/Hypermarkets, Convenience Stores, Online, and Others), By Region, By Competition Forecast & Opportunities, 2019-2029F

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Abstracts

India Gluten-Free Products Market has valued at USD17.19 million in 2023 and is anticipated to project robust growth in the forecast period with a CAGR of 13.3% through 2029. The India gluten-free products market has witnessed significant growth and transformation in recent years, reflecting changing dietary preferences, increased awareness of gluten-related health concerns, and a surge in the demand for healthier food options. This burgeoning market offers a wide array of gluten-free products, catering to consumers with celiac disease, gluten sensitivity, or those choosing a gluten-free lifestyle for various health reasons.

The India gluten-free products market has experienced robust growth, driven by a growing health-conscious population and increasing awareness of gluten-related issues. The market includes a diverse range of products such as gluten-free flours, bread, pasta, snacks, and beverages. While still relatively small compared to global markets, the gluten-free product segment in India is expanding steadily.

A prominent factor driving the growth of gluten-free products is the prevailing health and wellness trend in India. As consumers become more health-conscious, they are actively

seeking products that align with their dietary preferences and nutritional requirements. Many individuals are adopting gluten-free diets to address gastrointestinal discomfort or improve overall well-being.

Celiac disease is an autoimmune disorder triggered by the consumption of gluten. In recent years, there has been an increase in awareness and diagnosis of celiac disease in India. This has led to a surge in demand for certified gluten-free products to cater to the needs of individuals with celiac disease.

Beyond celiac disease, there is a growing recognition of non-celiac gluten sensitivity, which encompasses individuals who experience adverse reactions to gluten without having celiac disease. This has prompted more people to explore gluten-free diets as a means to alleviate symptoms.

Manufacturers and food companies have responded to the demand for gluten-free products by introducing innovative alternatives. These products not only address dietary restrictions but also offer taste and texture similar to their gluten-containing counterparts. Gluten-free baked goods, in particular, have seen notable improvements in quality and taste.

The availability of gluten-free products has expanded beyond specialty health food stores to mainstream supermarkets and online retail platforms. This increased accessibility has further fueled the market's growth.

Despite its growth, the India gluten-free products market faces challenges. One significant challenge is the higher cost associated with gluten-free ingredients and production processes. This can make gluten-free products more expensive than their gluten-containing counterparts, potentially limiting their accessibility to certain consumer segments.

The future of the India gluten-free products market appears promising. As consumer awareness continues to grow, and more people adopt gluten-free diets, the market is likely to expand further. Additionally, advancements in food technology and ingredient sourcing may contribute to improved affordability and quality of gluten-free products, making them more accessible to a broader audience.

Key Market Drivers

Rising Awareness of Gluten-Related Disorders

One of the primary drivers propelling the growth of the gluten-free products market in India is the increasing awareness of gluten-related disorders, particularly celiac disease and non-celiac gluten sensitivity (NCGS). Celiac disease is an autoimmune disorder in which the ingestion of gluten leads to damage in the small intestine, causing a range of gastrointestinal and systemic symptoms. NCGS, on the other hand, is characterized by similar symptoms without the autoimmune component.

As awareness about these conditions has grown, more people are seeking diagnosis and adopting gluten-free diets to manage their health. Medical professionals, nutritionists, and advocacy groups have played a crucial role in educating the public about the importance of gluten-free diets for individuals with these disorders. Consequently, a rising number of individuals are actively seeking gluten-free alternatives to traditional wheat-based products.

This heightened awareness has spurred demand for gluten-free products in various categories, including bread, pasta, snacks, and baked goods. Gluten-free labeling and certification have become essential for consumers, ensuring they can make informed choices when purchasing food products. As the medical community continues to emphasize the importance of diagnosing and managing gluten-related disorders, the India Gluten-Free Products Market is expected to benefit from this growing awareness.

Increasing Health and Wellness Consciousness

Another significant driver of the gluten-free products market in India is the overall shift toward health and wellness. An increasing number of consumers are adopting healthier lifestyles and making conscious dietary choices. Gluten-free diets are often perceived as healthier options, even for individuals without gluten-related disorders. This perception is driven by the belief that gluten-free diets may lead to better digestion, increased energy, and weight management.

Health-conscious consumers are exploring gluten-free alternatives to traditional wheat-based products as part of their pursuit of a balanced and wholesome diet. This trend has encouraged food manufacturers to introduce a wide variety of gluten-free options, from cereals and flours to snacks and desserts. Additionally, many gluten-free products are fortified with vitamins and minerals to meet the nutritional needs of health-conscious consumers.

The health and wellness movement also intersects with fitness and sports nutrition,

where gluten-free products have gained popularity among athletes and fitness enthusiasts. These individuals often seek gluten-free options to support their training and recovery goals. As the health and wellness trend continues to grow in India, the demand for gluten-free products is likely to increase, making this a significant driver for the market.

Expanding Retail and Online Availability

The third driver shaping the India Gluten-Free Products Market is the expanding availability of these products through various retail channels, including supermarkets, health food stores, specialty stores, and online platforms. In the past, finding gluten-free products in India could be challenging, but the retail landscape has evolved to meet the growing demand.

Supermarkets and hypermarkets now allocate dedicated sections to gluten-free products, making it more convenient for consumers to access a wide range of options. Health food stores and specialty outlets focus on providing niche products catering to specific dietary needs. The online marketplace has also played a pivotal role in making gluten-free products accessible to consumers across the country, even in areas where physical retail presence is limited.

E-commerce platforms offer a broad selection of gluten-free items, allowing consumers to browse and purchase products from the comfort of their homes. This increased availability and convenience have facilitated the adoption of gluten-free diets, as consumers no longer face the same challenges they once did in sourcing these products.

Key Market Challenges

Lack of Awareness and Education

One of the foremost challenges in the India Gluten-Free Products Market is the widespread lack of awareness and education about gluten-related disorders. Celiac disease and non-celiac gluten sensitivity are often underdiagnosed or misdiagnosed in India due to a lack of understanding among both the general population and healthcare professionals.

Celiac disease, an autoimmune disorder triggered by the ingestion of gluten, often goes undiagnosed for years. This is partly because its symptoms, which include digestive

issues, fatigue, and skin problems, are sometimes attributed to other conditions. Non-celiac gluten sensitivity, a condition characterized by similar symptoms but without the autoimmune response seen in celiac disease, is even less understood.

Moreover, many Indian consumers are unfamiliar with the concept of gluten itself, as gluten-free diets are relatively new to the country. This lack of awareness hampers the growth of the gluten-free products market, as potential consumers may not realize they have a dietary need for such products.

To address this challenge, there is a need for comprehensive educational initiatives aimed at both consumers and healthcare professionals. Raising awareness about gluten-related disorders and the benefits of gluten-free diets can help expand the market and ensure that those who need these products have access to them.

Limited Product Availability and Accessibility

While the availability of gluten-free products has improved in recent years, access to a wide variety of these products can still be limited, especially in non-metropolitan areas. Consumers in smaller towns and rural areas may have limited access to specialized gluten-free products, which are often stocked in larger cities.

This challenge is further exacerbated by the relatively high cost of gluten-free products compared to their gluten-containing counterparts. The production of gluten-free items often requires specialized ingredients and processes, making them more expensive. This pricing disparity can deter many consumers, particularly those with lower incomes, from incorporating gluten-free products into their diets.

To address this challenge, it's essential for both manufacturers and retailers to expand their distribution networks to reach consumers in smaller towns and rural areas. Additionally, efforts should be made to promote affordability through economies of scale and competitive pricing. Government incentives or subsidies for gluten-free products could also help make them more accessible to a broader population.

Quality and Labeling Concerns

Another significant challenge in the India Gluten-Free Products Market is the issue of product quality and accurate labeling. As the market has grown, so too have concerns about the authenticity of gluten-free claims on product labels. Some products labeled as gluten-free may still contain trace amounts of gluten due to cross-contamination during

processing or ingredient sourcing.

Consumers with celiac disease or gluten sensitivity must rely on the accuracy of labeling to make safe choices. When products are mislabeled or when cross-contamination occurs, it poses a significant risk to their health.

To address this challenge, stricter regulations and standards regarding gluten-free labeling should be enforced. The Food Safety and Standards Authority of India (FSSAI) has made efforts to address this issue by setting specific standards for gluten-free products and labeling requirements. However, effective enforcement and monitoring of these regulations are essential to ensure that consumers can trust the accuracy of gluten-free labels.

Key Market Trends

Rising Health and Wellness Consciousness

One of the most prominent trends in the India Gluten-Free Products Market is the increasing health and wellness consciousness among consumers. As people become more aware of the potential health risks associated with gluten consumption, there is a growing demand for gluten-free alternatives. This trend is particularly pronounced among individuals with celiac disease, non-celiac gluten sensitivity, and those who follow gluten-free diets for various health reasons.

Health-conscious consumers are seeking gluten-free products not only as a dietary requirement but also as a lifestyle choice. They view gluten-free options as a way to promote overall well-being, manage weight, and alleviate digestive discomfort. This trend has led to the proliferation of gluten-free products across various categories, including bakery items, pasta, snacks, and even beverages.

Manufacturers are responding to this trend by offering a wider range of gluten-free products made from alternative flours such as rice flour, almond flour, coconut flour, and chickpea flour. Additionally, they are fortifying these products with essential nutrients to ensure that consumers do not miss out on vital vitamins and minerals by excluding gluten from their diets.

Diverse Product Innovation and Expansion

Another notable trend in the India Gluten-Free Products Market is the continuous

innovation and expansion of product offerings. Manufacturers are diversifying their gluten-free product portfolios to cater to different tastes and dietary preferences. This trend encompasses the development of gluten-free versions of traditional Indian foods, such as gluten-free chapatis, dosas, and idlis.

Moreover, gluten-free snacks and convenience foods have gained popularity, targeting the on-the-go consumer segment. These products include gluten-free chips, cookies, and ready-to-eat meals, which provide convenience without compromising on dietary requirements. This innovation has allowed individuals with gluten sensitivities to enjoy a wider variety of foods that were previously off-limits.

In addition to diversification, the market has seen the incorporation of healthier ingredients into gluten-free products. Manufacturers are focusing on making their products not just gluten-free but also nutritious. This involves using whole grains, seeds, and plant-based proteins to enhance the nutritional profile of gluten-free offerings.

Furthermore, the gluten-free trend has extended beyond the realm of food and beverages. Personal care and beauty products labeled as gluten-free have gained traction, as consumers are mindful of potential skin reactions and allergies related to gluten-containing cosmetics and skincare items.

Retail and E-commerce Expansion

The third significant trend in the India Gluten-Free Products Market is the expansion of retail channels and the increasing availability of gluten-free products through e-commerce platforms. Access to these products has improved significantly, making them more accessible to consumers across the country.

Traditional grocery stores, health food stores, and supermarkets have dedicated sections for gluten-free products. These retail outlets are partnering with gluten-free brands to provide a comprehensive selection, allowing consumers to explore a wide range of gluten-free options conveniently.

The growth of e-commerce has been a game-changer for the gluten-free market. Online platforms offer an extensive variety of gluten-free products, including those from international brands. This accessibility is especially beneficial for consumers in areas with limited physical retail options.

Moreover, e-commerce platforms provide a platform for niche gluten-free brands to

reach a broader audience. Consumers can easily compare prices, read reviews, and make informed decisions when purchasing gluten-free products online. This trend has not only increased the availability of gluten-free products but has also contributed to market growth.

Segmental Insights

Product Type Insights

In recent years, bakery products have carved out a significant share in the India gluten-free products market, reflecting changing dietary preferences and a growing awareness of gluten-related health concerns. Gluten-free bakery products, which are made without wheat, rye, barley, or their derivatives, have gained immense popularity among consumers in India who either have celiac disease or are adopting gluten-free diets for various health reasons. This shift in consumer behavior has transformed the gluten-free bakery segment into a thriving and competitive market within the broader gluten-free products industry.

The demand for gluten-free bakery products in India is being fueled by several key factors. First and foremost is the increasing prevalence of celiac disease and non-celiac gluten sensitivity. Celiac disease is an autoimmune disorder triggered by the consumption of gluten, and its diagnosis rate has been steadily rising. As awareness of these conditions grows, more individuals are seeking gluten-free alternatives to traditional wheat-based bakery products. This has created a substantial market for gluten-free bread, cakes, cookies, and pastries.

Moreover, the gluten-free trend is not limited to those with diagnosed gluten-related disorders. Many health-conscious consumers are adopting gluten-free diets as a lifestyle choice, believing that it can lead to improved digestion, increased energy levels, and weight management. This trend is further fueled by the perception that gluten-free bakery products are healthier and better aligned with overall wellness goals. As a result, gluten-free bakery products are finding their way into the shopping carts of an expanding consumer base.

The bakery industry in India has responded to this growing demand by introducing a wide array of gluten-free options. Bakeries, both large-scale and artisanal, are increasingly offering gluten-free versions of their popular items, ensuring that consumers with dietary restrictions can enjoy their favorite treats without compromising on taste or texture. These gluten-free products are often made using alternative flours

such as rice flour, almond flour, chickpea flour, and tapioca flour, among others, to replicate the mouthfeel and flavor of traditional baked goods.

One of the significant advantages of gluten-free bakery products is their versatility. They can cater to various dietary needs, including vegan, paleo, and keto diets, making them inclusive and appealing to a diverse consumer base. The availability of gluten-free bakery items is no longer limited to specialty stores; mainstream supermarkets and online retailers now stock a wide range of these products, further increasing their accessibility.

The growth of the gluten-free bakery segment has also encouraged innovation in the Indian food industry. Manufacturers are continually developing new recipes and formulations to improve the taste and texture of gluten-free bakery products, addressing a common criticism that gluten-free alternatives can be dry or lacking in flavor. Additionally, these products are often fortified with vitamins and minerals to enhance their nutritional value, further appealing to health-conscious consumers.

Sales Channel Insights

The online sales channel has emerged as a significant player in the India Gluten-Free Products Market, reshaping the way consumers access and purchase gluten-free products in the country. This transformation is driven by various factors, including changing consumer preferences, convenience, a wide product range, and increased internet penetration.

First and foremost, the rise of online shopping in India has been nothing short of a revolution. With the proliferation of smartphones and affordable internet access, consumers across the country are increasingly turning to online platforms to meet their shopping needs, including dietary-specific products like gluten-free items. This shift is particularly notable in urban areas where busy lifestyles and long commutes make traditional brick-and-mortar shopping less convenient.

The convenience of the online sales channel cannot be overstated. Gluten-free diets are often prescribed for individuals with celiac disease or gluten sensitivity, and finding suitable products in physical stores can be a challenging task. Online platforms offer a vast selection of gluten-free options, making it easier for consumers to find products that suit their dietary requirements. This convenience extends to those living in remote areas with limited access to specialty stores, providing them with a wider range of choices.

The diversity of gluten-free products available online is another key factor contributing to the channel's significant share in the market. Whether it's gluten-free flours, snacks, pasta, or baked goods, online platforms offer an extensive array of options catering to various dietary needs and tastes. This variety is especially appealing to consumers who wish to maintain a gluten-free diet without compromising on food quality or flavor.

Moreover, the online sales channel allows for easy comparison of products, prices, and customer reviews. Consumers can make informed decisions, read product labels, and assess the experiences of others who have purchased the same items. This transparency fosters consumer confidence in gluten-free products and helps them make choices that align with their dietary goals and preferences.

The India Gluten-Free Products Market is witnessing growth not only due to individuals with specific dietary restrictions but also because of the broader health and wellness trend. Many consumers are opting for gluten-free options as part of a healthier lifestyle, further boosting the demand for such products. The online sales channel effectively caters to this diverse consumer base, offering both specialty gluten-free brands and mainstream products that have adapted to this trend.

Regional Insights

The North region of India is poised to hold a substantial share in the India energy drinks market during the forecast period, and this dominance is influenced by several key factors that shape the energy drink industry in this region.

The North region, encompassing states like Delhi, Haryana, Punjab, Uttar Pradesh, and Himachal Pradesh, is characterized by a sizable urban population, including bustling metropolitan areas like Delhi and Chandigarh. The fast-paced urban lifestyle, with demanding work schedules and an active social scene, drives the demand for energy drinks as consumers seek quick and convenient sources of vitality and alertness.

The North region has witnessed a growing health and fitness culture, with more people embracing active lifestyles, engaging in fitness activities, and seeking products that complement their routines. Energy drinks, often marketed as performance-enhancing beverages, are favored by fitness enthusiasts and gym-goers for their ability to provide a boost of energy before or after workouts.

The North region experiences diverse climatic conditions, with hot summers and chilly winters. Energy drinks cater to both extremes. In summer, they offer refreshment and

hydration, while in winter, they provide warmth and energy. This seasonal versatility ensures a year-round demand for energy drinks, bolstering their prominence in the market.

Rising disposable incomes in the North region have made consumers more willing to spend on premium energy drinks, which are often positioned as lifestyle products. The ability to afford these beverages has contributed to their growing popularity.

The energy drinks market in the North region is fiercely competitive, with a mix of global and domestic players vying for market share. This competition drives innovation in terms of flavors, formulations, and marketing strategies, benefitting consumers and fueling market growth.

The North region's urban centers are hubs of awareness and accessibility. Energy drinks are readily available in convenience stores, supermarkets, gyms, and even educational institutions, making them easily accessible to a wide consumer base. Effective marketing campaigns and endorsements by fitness influencers and celebrities further boost awareness and consumption.

With a growing emphasis on health and wellness, consumers in the North region are increasingly inclined toward energy drinks that offer functional benefits beyond mere caffeine stimulation. Brands are responding by introducing variants with natural ingredients, vitamins, and reduced sugar content to cater to health-conscious consumers.

The North region has experienced significant growth in e-commerce, making it easier for consumers to access a wide range of energy drink options online. This digital expansion has contributed to the market's reach and growth.

Key Market Players

Amy's Kitchen Inc.

Dr. Schar

Kraft Heinz Company

General Mills Inc.

Genius Foods

Swmabhan Commerce Pvt. Ltd.

Wild Drum Beverages Private Limited

Bob's Red Mill

Boulder Brands Inc.

KRBL Limited

Report Scope:

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

India Gluten-Free Products Market, By Product Type:

Bakery Products

Pizzas & Pastas

Cereals & Snacks

Savories

Desserts & Ice-creams

Others

India Gluten-Free Products Market, By Source:

Oilseeds & Pulses

Rice & Corn

Dairy & Meat Products

Others

India Gluten-Free Products Market, By Sales Channel:

Supermarkets/Hypermarkets

Convenience Stores

Online

Others

India Gluten-Free Products Market, By Region:

North

South

East

West

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the India gluten-free products market.

Available Customizations:

India Gluten-Free 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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