

India Yogurt Market By Type (Non-Flavored, Flavored), By Fat Content, (Regular, Low Fat, Fat-Free), By Form (Conventional Yogurt, Set Yogurt, Greek Yogurt, Frozen Yogurt, Yogurt Drinks and Others), By Packaging (Pouches, Plastic Bottles, Tetra Packs and Others), By Sales Channel (Supermarkets/Hypermarkets, Convenience Stores, Online, Others), By Region, By Competition Forecast & Opportunities, 2019-2029F

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Abstracts

India Yogurt Market has valued at USD 29.55 billion in 2023 and is anticipated to project robust growth in the forecast period with a CAGR of 9.1% through 2029. The yogurt market in India has experienced remarkable growth and transformation in recent years. Once a niche product in the Indian dairy industry, yogurt has now become a mainstream food item, enjoyed by millions across the country. This surge in popularity can be attributed to several key factors that have shaped the India yogurt market.

Yogurt has a long history in Indian cuisine and culture. It is a staple ingredient in traditional Indian recipes like raita, lassi, and dahi, and is an integral part of daily meals for many. This cultural significance has contributed to yogurt's enduring popularity and acceptance in the Indian market. Manufacturers have introduced a wide range of yogurt flavors, catering to the diverse taste preferences of Indian consumers. From classic fruit flavors to more unique options like masala chai and saffron, yogurt brands have capitalized on the variety of regional and cultural influences that shape Indian culinary traditions.

The availability of yogurt in convenient packaging, including single-serving cups and pouches, has made it a popular on-the-go snack. Yogurt has become a quick and nutritious option for busy urban lifestyles, particularly in metropolitan areas where convenience is highly valued. The Indian yogurt market is not limited to traditional plain yogurt; it includes a variety of product offerings. Greek yogurt, low-fat options, and yogurt-based drinks have gained popularity among consumers seeking healthier alternatives.

Yogurt manufacturers have invested in marketing and promotional campaigns to create awareness about the benefits of yogurt consumption. These efforts have highlighted yogurt's role in promoting gut health and overall well-being. As disposable incomes in India have risen, consumers are more willing to spend on premium and health-conscious products. Yogurt, with its array of offerings, has attracted a growing base of consumers willing to invest in quality dairy products.

Urbanization has led to changes in dietary preferences and increased exposure to international food trends. Yogurt fits well into this changing landscape, as it aligns with modern dietary requirements and is easily incorporated into a variety of cuisines. Leading global yogurt brands have entered the Indian market, bringing with them their expertise in yogurt production and marketing. Their presence has not only expanded the market but has also improved product quality and variety.

In conclusion, the India yogurt market is witnessing dynamic growth, with yogurt transitioning from a traditional dairy product to a symbol of health and modern lifestyle. As consumer awareness of the nutritional benefits of yogurt continues to rise and as manufacturers introduce innovative flavors and packaging, the market is poised for further expansion. Yogurt's versatility, cultural relevance, and adaptability to changing consumer preferences make it a significant and enduring part of the Indian dairy industry.

Key Market Drivers

Health and Wellness Trends

One of the primary drivers of the burgeoning Indian yogurt market is the increasing focus on health and wellness among consumers. In recent years, there has been a noticeable shift towards healthier dietary choices, with more people seeking products that offer not only taste but also substantial health benefits. Yogurt, often touted as a nutritious superfood, aligns perfectly with these evolving consumer preferences.

Yogurt is rich in essential nutrients, including calcium, probiotics, vitamins, and protein. Probiotics, in particular, have gained immense popularity due to their positive impact on gut health and overall well-being. As more consumers become health-conscious and seek products that aid digestion and support the immune system, yogurt has become a staple in many Indian households.

The concept of yogurt as a 'functional food' is becoming increasingly prevalent. Consumers are actively looking for yogurt with added ingredients like fruits, nuts, and seeds to enhance its nutritional value. This trend has given rise to a variety of yogurt-based products, such as Greek yogurt, yogurt drinks, and yogurt parfaits, further diversifying the market.

Moreover, yogurt is seen as a healthy snack option, making it popular among the younger generation and urban professionals who prefer on-the-go, nutrient-packed foods. As a result, the Indian yogurt market has expanded to include various product formats catering to different consumption occasions.

The Indian yogurt market is also responding to the increasing demand for lactose-free and plant-based options. Lactose intolerance is prevalent in India, and as awareness of this issue grows, so does the demand for dairy-free yogurt made from almond, soy, coconut, and other plant-based sources. This expansion of the product range caters to a broader spectrum of dietary requirements and preferences.

Rising Disposable Income and Urbanization

The Indian yogurt market is experiencing significant growth due to the rise in disposable income and urbanization. With more consumers living in urban areas and experiencing an increase in income levels, there is a greater capacity to spend on convenient, nutritious, and value-added food products like yogurt.

Urbanization has led to busier lifestyles, with many individuals seeking convenient and portable snack options. Yogurt, available in various packaging sizes and often fortified with added ingredients, offers a convenient and healthy snack solution for urban consumers. The 'on-the-go' yogurt cups and pouches are particularly popular among busy professionals and students.

In addition to urbanization, the Indian yogurt market is witnessing growth in semi-urban and rural areas. Increased awareness of the nutritional benefits of yogurt and the

proliferation of dairy cooperatives and private dairy players in these regions have made yogurt more accessible to a wider population. This has driven significant growth, as yogurt is perceived as an affordable and healthy source of essential nutrients.

The increasing consumer awareness and demand for yogurt have prompted various dairy companies to expand their reach and invest in marketing and distribution networks, even in remote areas of the country. This expansion into underserved regions is contributing to the yogurt market's growth.

Flavor Innovation and Cultural Adaptation

The third driver of the Indian yogurt market is the ever-expanding landscape of flavors and cultural adaptations. India's diverse cultural and culinary heritage is reflected in the yogurt market, as companies experiment with a wide range of flavors and formulations to cater to regional tastes.

For instance, 'lassi,' a traditional Indian yogurt-based drink, is now available in various flavors, including mango, rose, and saffron, to appeal to local preferences. In addition, the fusion of yogurt with spices, herbs, and fruits has resulted in unique and regionalized variations that attract a broad spectrum of consumers.

To cater to the younger demographic and the health-conscious segment, Greek yogurt, which is thicker and protein-rich, has made its presence felt in the market. This variety has been well-received due to its versatility and suitability for both sweet and savory applications.

Moreover, yogurt-based desserts, such as 'shrikhand' and 'mishti doi,' have become popular, indicating the cultural adaptability of yogurt in Indian cuisine. These traditional desserts with a yogurt base are experiencing a resurgence in popularity, especially during festivals and special occasions.

The Indian yogurt market is also witnessing innovation in packaging and portion sizes. Smaller, single-serving yogurt cups have gained traction, making yogurt a convenient and portion-controlled snack. Larger tubs and family-sized containers are also available, catering to households and families.

Key Market Challenges

Intense Competition and Price Sensitivity

One of the major challenges in the Indian yogurt market is the intense competition among various players, both domestic and international. The market is flooded with a plethora of yogurt brands, offering a wide range of flavors, textures, and packaging options. This competition often leads to price wars as brands strive to gain a competitive edge.

Price sensitivity among Indian consumers is a significant hurdle for yogurt manufacturers. While yogurt is considered a healthy and nutritious product, many consumers remain price-conscious, particularly in a market where affordability is a key consideration. This challenge is further exacerbated by the presence of local dairies and small-scale yogurt producers, which offer yogurt at lower price points, making it difficult for larger brands to maintain premium pricing.

To address this challenge, yogurt manufacturers must strike a delicate balance between offering competitive pricing and maintaining product quality. Differentiated marketing strategies, such as promoting the health benefits of yogurt, can also help brands stand out in a crowded market.

Supply Chain and Infrastructure Challenges

The yogurt market in India faces logistical and supply chain challenges that can affect product quality and availability. The country's vast geographical expanse and variable infrastructure can lead to issues related to transportation, cold storage, and distribution. Maintaining the cold chain is particularly crucial for yogurt products, as temperature control is essential to preserving freshness and quality.

While urban areas may have a relatively well-established supply chain infrastructure, reaching rural and remote regions can be challenging. As yogurt consumption is not limited to urban areas, extending the distribution network to serve these diverse markets is a critical issue. Inadequate cold storage facilities can result in spoilage and wastage of yogurt products, impacting both manufacturers and consumers.

To overcome these challenges, yogurt manufacturers need to invest in robust supply chain management, cold storage facilities, and efficient transportation systems. Additionally, public and private sector collaboration is essential to improve infrastructure and expand the reach of yogurt products to rural and underserved areas.

Dairy Industry Fluctuations and Ingredient Sourcing

The Indian yogurt market heavily relies on the dairy industry for its primary ingredient, milk. The dairy industry in India is characterized by fluctuations in milk production, which can be influenced by factors such as seasonal variations, climate conditions, and the health of dairy animals. These fluctuations can lead to supply constraints and price volatility for milk and dairy products.

Furthermore, ensuring a consistent and high-quality supply of milk is crucial for yogurt manufacturers to maintain product standards. The sourcing of milk from various regions with varying quality standards can be a challenge. Maintaining quality control and traceability throughout the supply chain becomes vital to produce safe and reliable yogurt products.

The dairy industry also faces issues related to milk adulteration, which can affect the quality and safety of dairy-based products like yogurt. Ensuring the authenticity and purity of milk sourced for yogurt production is an ongoing challenge.

Key Market Trends

Growing Demand for Health and Wellness Products

One of the most prominent trends in the Indian yogurt market is the surging demand for health and wellness products. Yogurt, with its rich nutritional profile and probiotic content, perfectly aligns with the increasing health-consciousness of Indian consumers. Yogurt is perceived as a healthy snack or meal option, offering benefits such as improved digestion, enhanced gut health, and a rich source of essential nutrients like calcium and protein.

Consumers in India are becoming more health-aware, particularly in urban areas. The desire for nutritious and convenient food options has led to a rising preference for yogurt as a healthy alternative to traditional snacks or desserts. Manufacturers have recognized this trend and are responding by introducing a variety of yogurt products, including low-fat, low-sugar, and probiotic-rich options to cater to different health needs.

Additionally, the Indian yogurt market is witnessing an influx of innovative and functional yogurt products. These include yogurts enriched with vitamins, minerals, and antioxidants, as well as lactose-free and dairy-free yogurt alternatives to accommodate consumers with dietary restrictions or sensitivities. This diversification in yogurt offerings reflects the industry's commitment to meeting the evolving health and wellness

preferences of the Indian consumer.

Flavor and Ingredient Diversification

Another significant trend in the Indian yogurt market is the growing diversity of flavors and ingredients. Indian consumers are increasingly seeking unique and exotic flavor experiences, prompting yogurt manufacturers to innovate and expand their product portfolios. Traditional flavors like mango and strawberry remain popular, but newer options such as blueberry, pomegranate, and exotic fruit blends are gaining traction.

The influence of global cuisines and culinary trends has encouraged the exploration of diverse ingredients in yogurt. Ingredients such as honey, nuts, seeds, and ancient grains are being incorporated into yogurt products to enhance both taste and nutritional value. Savory yogurt options with ingredients like herbs, spices, and vegetables are also emerging to cater to consumers looking for non-traditional yogurt experiences.

Moreover, yogurt-based snacks and desserts are becoming increasingly popular, offering convenience and indulgence in a single product. Yogurt parfaits, yogurt with granola, and yogurt-based smoothies have become go-to options for those seeking a balanced and satisfying snack or meal.

The expansion of flavor and ingredient options in the Indian yogurt market demonstrates the industry's commitment to meeting diverse consumer preferences and appealing to a broader audience.

Premiumization and Packaging Innovations

The third notable trend in the India yogurt market is the premiumization of yogurt products and packaging innovations. Consumers are willing to pay more for yogurt products that offer high-quality ingredients, unique flavors, and enhanced nutritional value. This trend is reflected in the introduction of premium and organic yogurt lines that cater to discerning consumers who prioritize product quality.

In response to this trend, yogurt manufacturers are focusing on packaging innovations. Eye-catching and environmentally friendly packaging designs are being utilized to attract consumers and convey the premium nature of the product. Packaging is no longer just a functional element; it has become a vital marketing tool that communicates the product's value and uniqueness.

Additionally, the on-the-go lifestyle of many urban consumers has led to the development of single-serving and portable yogurt options. Yogurt cups with built-in compartments for toppings and mix-ins have become popular, allowing consumers to customize their yogurt experience. These innovative packaging solutions enhance convenience and provide a premium, tailored experience.

Furthermore, the use of sustainable and eco-friendly packaging materials is gaining traction, reflecting a broader global movement towards environmental responsibility. Many yogurt brands are adopting recyclable or biodegradable packaging materials, demonstrating their commitment to reducing their environmental footprint.

Segmental Insights

Type Insights

Flavored yogurt has gained a significant share in the India yogurt market, representing a remarkable transformation in the preferences of Indian consumers. While traditional plain yogurt remains a staple in Indian diets, the burgeoning popularity of flavored yogurt has been a key driver of growth in the dairy industry. Several factors contribute to the dominance of flavored yogurt in the market.

One of the primary drivers of flavored yogurt's prominence is the evolving taste preferences of Indian consumers. As India undergoes rapid urbanization and globalization, the palates of consumers have become more diverse and experimental. Flavored yogurt offerings provide an array of options, from classic fruit flavors like mango and strawberry to innovative choices such as blueberry, caramel, and even savory flavors like mint and herb. This variety caters to the evolving taste preferences of the modern Indian consumer, making yogurt consumption a more enjoyable and versatile experience.

Health-conscious consumers have also embraced flavored yogurt as a nutritious and indulgent snack option. Manufacturers have responded by introducing low-fat and low-sugar variants, addressing concerns related to calorie content and sugar intake. The inclusion of probiotics in flavored yogurt has further increased its appeal, as consumers are increasingly recognizing the health benefits associated with probiotics, such as improved gut health and enhanced immunity.

Flavored yogurt has bridged the generational gap, appealing to both the younger and older demographics in India. While younger consumers are drawn to the exciting flavors

and the perception of yogurt as a trendy snack, older generations appreciate the health benefits of yogurt and its potential to serve as a meal replacement or a source of essential nutrients. This cross-generational appeal has expanded the market for flavored yogurt significantly.

The convenience factor also plays a pivotal role in the success of flavored yogurt. In a fast-paced society, consumers are seeking on-the-go options that are both nutritious and tasty. Flavored yogurt fits this need perfectly, with its portable and easily consumable packaging. It serves as a quick breakfast or a healthy snack during the day, making it a practical choice for busy individuals and families.

Moreover, flavored yogurt has found favor with children, and parents are choosing it as a healthier alternative to sugary snacks and desserts. Many flavored yogurt products are marketed as child-friendly, featuring playful packaging and lower sugar content than traditional desserts. Parents view flavored yogurt as a guilt-free option that can satisfy their children's sweet cravings while providing essential nutrients.

The aggressive marketing and advertising campaigns by yogurt manufacturers have further fueled the growth of flavored yogurt in India. These companies have leveraged the popularity of celebrities and social media influencers to promote their products, targeting a younger and digitally connected demographic. Such marketing strategies have raised brand awareness and driven consumer interest in flavored yogurt.

Sales Channel Insights

Online retail channels have secured a significant share in the India Yogurt Market, transforming the way consumers purchase this popular dairy product. Yogurt, a staple in Indian diets for its health benefits and versatility, has traditionally been bought through brick-and-mortar stores. However, with the rise of e-commerce and online grocery shopping, the dynamics of the yogurt market have evolved.

The growth of online yogurt sales can be attributed to several key factors. Firstly, the convenience of online shopping has enticed consumers to explore this option for their yogurt needs. Shoppers can now browse through a wide variety of yogurt brands, flavors, and types from the comfort of their homes or on the go. This convenience is particularly appealing to busy urban consumers who value time-saving solutions.

Online platforms have also made it easier for consumers to access a broader range of yogurt products. While local grocery stores may have limited shelf space, online

retailers can offer a diverse selection, including regional and international yogurt brands. This variety caters to different tastes and dietary preferences, making online shopping an attractive choice for those seeking specialized or hard-to-find yogurt options.

Moreover, the availability of subscription and delivery services has streamlined the yogurt buying process. Consumers can set up recurring orders, ensuring that they never run out of their favorite yogurt. This automated approach to grocery shopping simplifies life for many, as they can skip the hassle of making frequent trips to physical stores.

Additionally, the pandemic has accelerated the adoption of online shopping in India, including for yogurt. Consumers' concerns about safety and social distancing prompted many to turn to online platforms for their grocery needs. Yogurt, being a refrigerated and essential product, found a substantial market in online grocery delivery services, further contributing to the sector's growth.

The transparency and convenience of online reviews and ratings have played a significant role in shaping consumer choices. Shoppers can read about the experiences of others and make informed decisions about the yogurt they purchase. This dynamic has influenced the reputation and success of various yogurt brands in the online marketplace.

Regional Insights

The northern region of India has emerged as a prominent and influential player in the country's yogurt market. Yogurt, a versatile dairy product with a rich history in Indian cuisine, has garnered a significant share in the North due to various factors such as changing dietary preferences, cultural significance, and evolving consumer habits.

One of the primary reasons for the North's dominance in the Indian yogurt market is the region's strong connection to traditional dairy-based foods. Yogurt has been an integral part of the North Indian diet for centuries. Various forms of yogurt, including the popular 'dahi' or curd, are consumed in diverse culinary preparations, both as a standalone dish and as an essential ingredient in curries, raitas, and desserts. This cultural affinity for yogurt has made it a staple food item in North Indian households.

Changing dietary preferences and a growing focus on health and wellness have played a significant role in the region's yogurt market growth. Yogurt is known for its nutritional benefits, as it is a rich source of probiotics, calcium, and protein. Health-conscious consumers in the North are increasingly recognizing the importance of including yogurt

in their daily diets, leading to a surge in demand. Yogurt's probiotic properties, in particular, are highly valued for promoting digestive health, which aligns with the growing trend of wellness-conscious eating.

The North's diverse culinary traditions also contribute to its strong presence in the yogurt market. The region boasts a wide array of yogurt-based dishes, including the famous 'lassi,' a yogurt-based beverage that is a popular choice during the scorching North Indian summers. The versatility of yogurt in both sweet and savory preparations makes it a versatile ingredient in the regional cuisine, thereby driving its consistent consumption.

The region's expansive and flourishing dairy industry further bolsters the yogurt market. North India is home to numerous dairy cooperatives, private dairies, and milk processing units, contributing to the availability and freshness of dairy products, including yogurt. This has a direct impact on the quality and variety of yogurt products available to consumers.

Furthermore, the North's urbanization and changing consumer habits have led to the emergence of a dynamic yogurt market. With a growing urban population, there is an increased demand for convenient and ready-to-eat yogurt products, including flavored yogurts, yogurt drinks, and yogurt-based snacks. The northern region's cities and towns have witnessed the proliferation of modern retail outlets, making it easier for consumers to access a wide range of yogurt products.

Key Market Players

Amul (Gujarat Co-operative Milk Marketing Federation Limited)

Britannia Industries Limited

Cocoberry Retail Pvt. Ltd.

Drums Food International Private Limited

Heritage Novandie Foods Private Limited

Karnataka Milk Federation

Milky Mist Dairy

Mother Dairy Fruit & Vegetable Private Limited

Nestlé India Limited

Parag Milk Foods

Report Scope:

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

India Yogurt Market, By Type:

Non-Flavored

Flavored

India Yogurt Market, By Fat Content:

Regular

Low Fat

Fat-Free

India Yogurt Market, By Form:

Conventional Yogurt

Set Yogurt

Greek Yogurt

Frozen Yogurt

Yogurt Drinks

Others

India Yogurt Market, By Packaging:

Plastic Bottles

Tetra Packs

Others

India Yogurt Market, By Sales Channel:

Supermarkets/Hypermarkets

Convenience Stores

Online

Others

India Yogurt Market, By Region:

North

South

East

West

Competitive Landscape

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

Available Customizations:

India Yogurt market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization

India Yogurt Market By Type (Non-Flavored, Flavored), By Fat Content, (Regular, Low Fat, Fat-Free), By Form (C...

options are available for the report:

Company Information

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

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