

Lactose Intolerance Market - Global Industry Size, Share, Trends, Opportunity & Forecast, Segmented By Type (Primary, Secondary, Congenital, Developmental), By Diagnosis (Hydrogen breath test, Glucose blood test, Stool acidity test), By Region & Competition, 2021-2031F

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Abstracts

The global lactose intolerance market is projected to expand significantly, from USD 21.67 billion in 2025 to USD 32.14 billion by 2031, growing at a 6.79% CAGR. This market includes specifically formulated lactose-free dairy products, such as milk, yogurt, and cheese, alongside lactase enzyme supplements designed to aid individuals with lactose malabsorption. Key drivers supporting this growth are the increasing diagnosis of digestive sensitivities and a rising consumer preference for products offering dairy's nutritional benefits without gastrointestinal discomfort. Furthermore, technological advancements in enzymatic processes have greatly enhanced the flavor profile of lactose-free offerings, eliminating the previous overly sweet taste and thereby boosting consumer acceptance, as evidenced by a 13.6% dollar growth in US lactose-free milk sales in 2024.

Despite this growth, a significant challenge hindering broader market expansion is the intense competition from the burgeoning plant-based dairy alternative sector. Consumers are increasingly gravitating towards naturally lactose-free options like oat, almond, and soy beverages, which are often perceived as more environmentally sustainable and ethically preferable to animal-derived dairy. This shift forces lactose-free dairy manufacturers to contend not only with taste and price competition but also with changing lifestyle values that divert a portion of the target demographic toward non-dairy substitutes.

Market Driver

Strategic product diversification and portfolio expansion by key players have become a primary engine for market growth, with major dairy conglomerates investing in premium lactose-free formulations to cater to evolving tastes. Companies are moving beyond basic fluid milk to offer ultra-filtered, high-protein, and flavored options that retain nutritional value while eliminating digestive discomfort. This strategy effectively captures mainstream consumers who might otherwise drift to plant-based alternatives, as evidenced by the Fairlife brand's 28% year-over-year dollar sales surge to \$782 million in the refrigerated white milk category, underscoring the commercial viability of specialized portfolios and mirroring the overall 8.5% dollar value increase in lactose-free dairy product sales for the 52 weeks ending July 13, 2025.

Concurrently, the growing consumer focus on digestive wellness and gut health is reshaping demand, prompting shoppers to prioritize products offering gastrointestinal comfort. This trend is particularly evident in fermented dairy, where perceived probiotic benefits are amplified by lactose-free claims, appealing to health-conscious demographics seeking functional nutrition. This shift represents a move toward actively managing gut biomes rather than merely avoiding intolerance symptoms, with lactose-free yogurt sales rising by 43% compared to the prior year, validating the strong correlation between digestive health positioning and consumer purchasing behavior and indicating that digestive wellness is a central global consumption driver.

Market Challenge

Competition from the plant-based dairy alternative sector poses a direct impediment to the growth of the Global Lactose Intolerance Market. While specifically formulated lactose-free dairy products address the medical necessity of avoiding lactose, plant-based beverages such as oat and almond intrinsically offer a lactose-free profile that naturally appeals to the same consumer base. This overlap creates a divided market where individuals seeking relief from digestive discomfort are increasingly swayed by the additional environmental and ethical value propositions of plant-based options. Consequently, this shift diverts a portion of the core demographic away from reformulated animal-based dairy, eroding the potential market share for manufacturers who rely on these consumers for revenue expansion.

The magnitude of this competitive pressure is evidenced by the financial performance of the non-dairy sector, which saw global sales of non-dairy alternatives reach \$22.4 billion

in 2024, representing a 5 percent increase from the prior year. This sustained growth demonstrates that consumers are actively choosing non-dairy solutions over modified dairy products. As a result, lactose-free dairy producers face a shrinking captive audience, forcing them to contend with a competitor that satisfies the primary need for digestive comfort while simultaneously addressing lifestyle values that animal-derived products cannot match.

Market Trends

The expansion of private label and retailer-owned brands is fundamentally altering the competitive landscape, as major grocers aggressively develop proprietary lactose-free lines to offer cost-effective alternatives to national brands. This trend is driven by price-sensitive consumers who require the digestive benefits of lactose-free staples, such as milk and cheese, but are increasingly deterred by the premium pricing of branded functional dairy. Retailers are responding by optimizing their supply chains to deliver high-quality, store-brand formulations that mimic the taste and nutritional profile of established competitors, thereby democratizing access to these essential products. The commercial impact of this shift is evident in recent performance metrics, with private label dollar sales across all outlets increasing by 4.4% for the six months ending June 15, 2025, significantly outpacing the 1.1% gain recorded by national brands, particularly in refrigerated products.

Simultaneously, the emergence of precision fermentation for animal-free dairy represents a technological leap designed to decouple dairy protein production from conventional animal agriculture while maintaining authentic taste and texture. Unlike plant-based substitutes that often struggle to replicate the melt and mouthfeel of casein and whey, precision fermentation utilizes microbial hosts to produce bio-identical dairy proteins, appealing to ethical consumers who demand the functional experience of real dairy without the environmental footprint or animal welfare concerns. This sector is rapidly moving from R&D to commercialization, attracting substantial capital to scale manufacturing capabilities, exemplified by the food ingredient company Vivici raising a \$34 million Series A funding round to expand operations and accelerate the market entry of fermentation-derived beta-lactoglobulin, signaling strong investor confidence in this animal-free category's long-term viability.

Key Market Players

Nestle S.A.

Danone S.A.

Fonterra Co-operative Group Limited

Valio Oy

Lactalis Group

Arla Foods amba

The a2 Milk Company Limited

Saputo Inc.

Abbott Laboratories

Johnson & Johnson Services, Inc.

Report Scope

In this report, the Global Lactose Intolerance Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Lactose Intolerance Market, By Type

Primary

Secondary

Congenital

Developmental

Lactose Intolerance Market, By Diagnosis

Hydrogen breath test

Glucose blood test

Stool acidity test

Lactose Intolerance Market, By Region

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Asia Pacific

China

India

Japan

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Lactose Intolerance Market.

Available Customizations:

Global Lactose Intolerance Market report with the given market data, TechSci 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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