MULTICLIENT STUDY

Business Review
Dairy Ingredients India
Producers, Product, Supply & Demand

India

2016-2021

January 2017

Sectors



Milk, Reconstituted milk, Yogurt, Dairy beverages , Cheese, Infant formula, Bakery, Ice cream, Powdered beverages, Packaged traditional Indian sweets, Confectionery, Packaged/branded household products, Food service, Pharma



Markets



India

GIRACT
Geneva, Switzerland

Transnational Business Research & Consultancy

Introduction



India has slowly turned from a milk-deficit to a milk-excess country, and Indian milk output reached 146 mio tons in 2014-15, thanks to ongoing demand-side developments and supply-side promotions. Currently India ranks first in milk production in the world accounting for approximately 18.5% of total world production. Liberal policies for setting up new dairy processing facilities has led to higher private investment in this sector and has increased consumption of processed dairy products, estimated at 55% of total marketed milk.

While developed countries continue to lose share, low-cost emerging dairy producers and exporters are encouraged by higher prices of the last three years.

Apart from occupying the first place in world milk production, the increasing sophistication in local consumption and encouraging trends in exports are pushing local producers to add value to their products both at commodity and specialty ingredient levels. Growing demand and growing production of dairy ingredients make India a very lucrative filed to explore. This offers a unique opportunity for Western producers to forge special links with Indian dairy units. As a key player or a company wishing to find new opportunities, this study enables you to consider your response in charting the strategy of your organization.

Objectives of this study

Dairy Ingredients India – Producers, Product, Supply and Demand



- To examine the impact of socio economic factors on milk production
- To estimate total production/trends and production shares of key dairy products
- To identify the major dairy/ingredient producers and to assess their strategies
- To establish the strengths and weaknesses of these key dairy/dairy ingredient producers
- To understand the legal and political implications of any eventual partnerships with Indian dairy/dairy ingredient companies; To estimate current demand for dairy ingredients across sectors; To identify key demand drivers and challenges across sectors

This unique study examines producers, products, supply & demand forecasts of Dairy Ingredients in India.

SCOPE

Products



- Skim milk powder
- Whole milk powder
- Milk protein
- Whey powders
- WPC
- WPI
- Lactose
- Casein/caseinates

Markets



- **INDIA**

STUDY HIGHLIGHT

Programme

The dominant element of the study is based on interviews with R&D/NPD departments of end-use companies (to note that the analysis has been restricted to the organised sector, and efforts has been made to provide limited explanations on the unorganised sector)

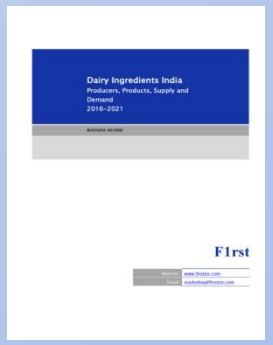
Current: 2016
Forecast: 2021

Timescale



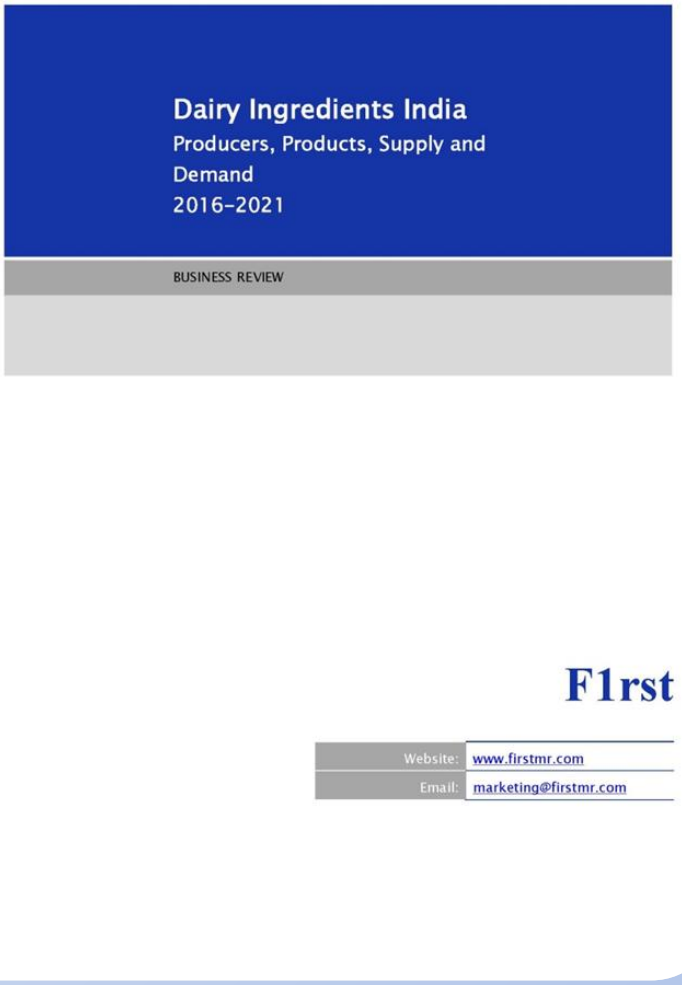
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1. **Electronic Copy** of report in searchable PDF format



2. Report published in **January 2017**

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Dairy Ingredients India
Producers, Products, Supply and Demand
2016-2021

BUSINESS REVIEW

F1rst

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1. EXECUTIVE SUMMARY

1.1. MARKET INSIGHT SUMMARY

the section will discuss about the various features of Indian Dairy Industry, the current market for dairy ingredients in India and the drivers of growth for the dairy ingredient market#

1.2. LEGISLATION

This section will discuss about the government legislation on the dairy and dairy ingredients#

1.3. MILK SUPPLY

Milk production trends in India 1999-2016

Year	Production (mio tons)	Per Capita Availability (g/day)
2005-06		
2006-07		
2007-08		
2008-09		
2009-10		
2010-11		
2011-12		
2012-13		
2013-14		
2014-15		

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1.4. LIVESTOCK POPULATION

Bovine heads

Bovine Type	Total (000s)	% of Total
Cross Breed		
Conventional		
Buffalos		
Total		

Key states having largest numbers of indigenous cows

State	Indigenous (000s)
Madhya Pradesh	
West Bengal	
Uttar Pradesh	
Maharashtra	
Orissa	
Rajasthan	
Bihar	
Chhatisgarh	
Andhra Pradesh	
Assam	

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Key states having largest numbers of indigenous buffalos

State	Indigenous (000s)
Uttar Pradesh	
Andhra Pradesh	
Rajasthan	
Madhya Pradesh	
Gujarat	
Maharashtra	
Haryana	
Punjab	
Bihar	
Karnataka	

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Key States having the largest numbers of crossbreed cows

State	Cross Breed ('000s)
Tamil Nadu	
Maharashtra	
Kerala	
Uttar Pradesh	
Karnataka	
Punjab	
Jammu & Kashmir	
Bihar	
West Bengal	
Andhra Pradesh	

Data Edited

1.5. RAW MILK PRICE STRUCTURE

1.5.1. PRICE SUPPORT SYSTEM

1.5.2. RETAIL PRICE

Retail price of processed milk

Year	Price INR/litre	Price USD/litre
2006		
2007		
2008		
2009		
2010		
2011		
2012		
2013		
2014		
2015		
2016		

Data Edited

2. LEGISLATION

2.1. MILK AND MILK PRODUCTS LEGISLATION

This section will discuss about various legislations related to dairy ingredients usage in India

2.2. IMPORT DUTY STRUCTURE AND EXPORT BENEFITS

#This section will discuss about the import duty structure of various dairy ingredients covered in this report. This will also compare past and present export benefits on the dairy ingredients#

Sample report pages

3. DAIRY INGREDIENTS -SUPPLY & DEMAND BY INGREDIENT

Scope of the ingredients covered in this study are: Processed cheese, Skim milk powder, Whole milk powder, milk protein, whey powders, WPC, WPI, lactose, casein/caseinates.

3.1. SMP/MILK SOLIDS/WMP

3.1.1. SUPPLY

The key producers of SMP/WMP in India:

Company	SMP	Milk Solids	WMP
Company 1			
Company 2			
Company 3			
Company 4			
....			
....			
....			
Sub-total			
Captive production			
Total production			

Data Edited

#The comprehensive list of companies producing the SMP/WMP in India will be produced in the table. #

3.1.2. AVAILABILITY

Availability of SMP/Milk solids/WMP in India in 2016 is thus estimated:

SMP/milk solids/WMP	SMP	Milk Solids	WMP
Production			
Captive production (Nestlé, GlaxoSmithKline, etc.)			
Exports			
Imports			
Availability			

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3.1.3. PRICES TRENDS:

This section will discuss about the current price trends of the SMP/Milk solids/WMP and the factor which affect the price

3.1.4. DEMAND

The overall demand for SMP/Milk Solids/WMP in 2016 and forecast in 2021 can be summarised as follows:

	2016			2020			CAGR (%)		
Sectors	SMP	Milk Solids	WMP	SMP	Milk Solids	WMP	SMP	Milk Solids	WMP
Bakery and Cereals									
Dairy Beverages (Low fat and 4.5% fat)									
Dairy Desserts									
Flavored Milk									
Probiotic Drinks									
Yogurt/curd									
Ice Cream									
Infant formula									
Baby food									
Nutrition Bars									
Functional drinks									
Slimming products									
Supplement products									
Packaged Indian Traditional Sweets									
Food Service									
Pharma									
Total									

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*products presented in detail in annex

**Cheese, condensed milk, ice cream, soups, vending, CMR, etc.

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3.2. CASEIN/CASEINATES

3.2.1. SUPPLY

Company	Ownership	Casein/Caseinate (kt)
Company 1		
Company 2		
Company 3		
Company 4		
....		
....		
....		
Total		

Data Edited

3.2.2. AVAILABILITY

Availability of casein/caseinates in India in 2016 is thus estimated:

	Kt
Production	
Exports	
Imports	
Availability	

3.2.3. PRICES

3.3. WPC

3.3.1. SUPPLY

Production of WPC in India in 2016: kt

Company	WPC 35	WPC 70	WPC 80
Company 1			
Company 2			
Company 3			
Company 4			
....			
....			
....			
Total			

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3.3.2. AVAILABILITY

Availability of WPC in India in 2016 is thus estimated: kt

	WPC 35	WPC 70	WPC 80
Production			
Exports			
Imports			
Availability			

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3.3.3. PRICES

This section will discuss about the current price trends of the WPC and the factors which affect the price

Sample report pages

3.3.4. DEMAND

The demand pattern for WPC in 2016 and forecast 2021 in India can be estimated as follows:

kt

	2016			2020			CAGR (%)		
Sectors	WPC 35	WPC 70	WPC 80	WPC 35	WPC 70	WPC 80	WPC 35	WPC 70	WPC 80
Bakery and Cereals									
Dairy Beverages									
Dairy Desserts									
Flavored Milk									
Probiotic Drinks									
Yogurt/curd									
Ice Cream									
Infant formula									
Baby food									
Nutrition Bars									
Functional drinks									
Slimming products									
Supplement products									
Packaged Indian Traditional Sweets									
Food Service									
Pharma									
Total									

Data Edited

3.4. LACTOSE

3.4.1. SUPPLY

Key producers of lactose in 2016 in India are shown in the following table

Company	Lactose (kt)
Company 1	
Company 2	
Company 3	
Company 4	
....	
....	
....	
Total	

Data Edited

3.4.2. AVAILABILITY

Availability for lactose in India in 2016 can be summarised as follows:

	kt
Production	
Exports	
Imports	
Availability	

Data Edited

3.4.3. PRICES

#This section will discuss about the current price trends of lactose and the factors which affect the price changes#

Sample report pages

3.4.4. DEMAND

The pharma sector accounts for the clear majority of consumption of lactose in India. The demand dispersion for lactose in India in 2016 is shown below:

kt

Sectors	2016 Lactose	2020 Lactose	CAGR (%) Lactose
Bakery and Cereals			
Dairy Beverages (Low fat and 4.5% fat)			
Dairy Desserts			
Flavored Milk			
Probiotic Drinks			
Yogurt/curd			
Ice Cream			
Infant formula			
Baby food			
Nutrition Bars			
Functional drinks			
Slimming products			
Supplement products			
Packaged Indian Traditional Sweets			
Food Service			
Pharma			
Total			

Data Edited

3.5. WPI

3.5.1. SUPPLY

Key producers of WPI in 2016 in India are shown in the following table

Company	WPI (kt)
Company 1	
Company 2	
Company 3	
Company 4	
....	
....	
....	
Total	

Data Edited

3.5.2. AVAILABILITY

Availability for WPI in India in 2016 can be summarised as follows:

	kt
Production	
Exports	
Imports	
Availability	

3.5.3. PRICES

#This section will discuss about the current price trends of WPI and the factors which affect the price changes#

3.5.4. DEMAND

The pharma sector accounts for the clear majority of consumption of lactose in India. The demand dispersion for lactose in India in 2016 is shown below

Sectors	2016 WPI	2020 WPI	CAGR (%) WPI
Bakery and Cereals			
Dairy Beverages (Low fat and 4.5% fat)			
Dairy Desserts			
Flavored Milk			
Probiotic Drinks			
Yogurt/curd			
Ice Cream			
Infant formula			
Baby food			
Nutrition Bars			
Functional drinks			
Slimming products			
Supplement products			
Packaged Indian Traditional Sweets			
Food Service			
Pharma			
Total			

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Sample report pages

3.6. MILK PROTIENS

3.6.1. SUPPLY

Key producers of Milk Proteins in 2016 in India are shown in the following table

Company	Milk Proteins (kt)
Company 1	
Company 2	
Company 3	
Company 4	
....	
....	
Total	

Data Edited

3.6.2. AVAILABILITY

Availability for Milk Proteins in India in 2016 can be summarised as follows:

	kt
Production	
Exports	
Imports	
Availability	

Data Edited

3.6.3. PRICES

3.6.4. DEMAND

The demand dispersion for lactose in India in 2016 is shown below

kt

Sectors	2016 Milk Proteins	2020 Milk Proteins	CAGR (%) Milk Proteins
Bakery and Cereals			
Dairy Beverages (Low fat and 4.5% fat)			
Dairy Desserts			
Flavored Milk			
Probiotic Drinks			
Yogurt/curd			
Ice Cream			
Infant formula			
Baby food			
Nutrition Bars			
Functional drinks			
Slimming products			
Supplement products			
Packaged Indian Traditional Sweets			
Food Service			
Pharma			
Total			

Data Edited

3.7. PROCESSED CHEESE

3.7.1. SUPPLY

Key producers of processed cheese in 2016 in India are shown in the following table

Company	Processed cheese (kt)
Company 1	
Company 2	
Company 3	
Company 4	
....	
....	
Total	

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3.7.2. AVAILABILITY

Availability for processed cheese in India in 2016 can be summarised as follows:

	kt
Production	
Exports	
Imports	
Availability	

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3.7.3. PRICES

#This section will discuss about the current price trends of processed cheese and the factors which affect the price changes#

3.7.4. DEMAND

The pharma sector accounts for the clear majority of consumption of lactose in India. The demand dispersion for lactose in India in 2016 is shown below:

kt

	2016	2020	CAGR (%)
Sectors	Processed Cheese	Processed Cheese	Processed Cheese
Bakery and Cereals			
Dairy Beverages (Low fat and 4.5% fat)			
Dairy Desserts			
Flavored Milk			
Probiotic Drinks			
Yogurt/curd			
Ice Cream			
Infant formula			
Baby food			
Nutrition Bars			
Functional drinks			
Slimming products			
Supplement products			
Packaged Indian Traditional Sweets			
Food Service			
Pharma			
Total			

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Ingredient	Reconst. Milk	Dairy Beverages	Infant foods	Bakery	Ice Cream	Powdered beverages	Traditional Indian foods	Confectionery	Packaged household products	Food service	Pharma	Total
SMP/milk solids/WMP												
Casein/ate												
WPC												
Lactose												
WPI												
Whey powder												
Milk protein												
Processed cheese												

Data Edited

5.5. DEMAND FORECAST FOR DAIRY INGREDIENTS BY SECTOR 2016

kt

Ingredients	Reconst. Milk	Dairy Beverages	Infant foods	Bakery	Ice Cream	Powdered beverages	Packaged traditional Indian foods	Confectionery	Packaged household products	Food service	Pharma	Total
SMP/milk solids/WMP												
Casein/ate												
WPC												
Lactose												
WPI												
Whey powder												
Milk protein												
Processed cheese												

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