

# Dairy Products and Alternatives in Pakistan

September 2023

Table of Contents

## Dairy Products and Alternatives in Pakistan

### EXECUTIVE SUMMARY

Dairy products and alternatives in 2023: The big picture

Key trends in 2023

Competitive Landscape

Channel developments

What next for dairy products and alternatives?

### MARKET DATA

Table 1 - Sales of Dairy Products and Alternatives by Category: Value 2018-2023

Table 2 - Sales of Dairy Products and Alternatives by Category: % Value Growth 2018-2023

Table 3 - NBO Company Shares of Dairy Products and Alternatives: % Value 2019-2023

Table 4 - LBN Brand Shares of Dairy Products and Alternatives: % Value 2020-2023

Table 5 - Distribution of Dairy Products and Alternatives by Format: % Value 2018-2023

Table 6 - Forecast Sales of Dairy Products and Alternatives by Category: Value 2023-2028

Table 7 - Forecast Sales of Dairy Products and Alternatives by Category: % Value Growth 2023-2028

### DISCLAIMER

### SOURCES

Summary 1 - Research Sources

## Baby Food in Pakistan

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Parents seek out milk formula due to referrals and nutritional benefits

Price and tax increases on baby formula milk

Consumers feel pressure of rising prices

#### PROSPECTS AND OPPORTUNITIES

New laws on labelling milk formula products

Formula milk and baby food is being replaced with breastfeeding

Preference for more sustainable products dependent on consumer purchasing power

### CATEGORY DATA

Table 8 - Sales of Baby Food by Category: Volume 2018-2023

Table 9 - Sales of Baby Food by Category: Value 2018-2023

Table 10 - Sales of Baby Food by Category: % Volume Growth 2018-2023

Table 11 - Sales of Baby Food by Category: % Value Growth 2018-2023

Table 12 - NBO Company Shares of Baby Food: % Value 2019-2023

Table 13 - LBN Brand Shares of Baby Food: % Value 2020-2023

Table 14 - Distribution of Baby Food by Format: % Value 2018-2023

Table 15 - Forecast Sales of Baby Food by Category: Volume 2023-2028

Table 16 - Forecast Sales of Baby Food by Category: Value 2023-2028

Table 17 - Forecast Sales of Baby Food by Category: % Volume Growth 2023-2028

Table 18 - Forecast Sales of Baby Food by Category: % Value Growth 2023-2028

## Butter and Spreads in Pakistan

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Packaged butter and ghee popular among urban consumers  
Upfield's Blue Band continues to dominate margarine  
Packaged butter brands offer value for money

#### PROSPECTS AND OPPORTUNITIES

Solid growth prospects for butter and spreads  
Modern channel is gaining ground in butter and spreads  
Home baking trend set to continue pushing butter and margarine sales

#### CATEGORY DATA

Table 19 - Sales of Butter and Spreads by Category: Volume 2018-2023  
Table 20 - Sales of Butter and Spreads by Category: Value 2018-2023  
Table 21 - Sales of Butter and Spreads by Category: % Volume Growth 2018-2023  
Table 22 - Sales of Butter and Spreads by Category: % Value Growth 2018-2023  
Table 23 - NBO Company Shares of Butter and Spreads: % Value 2019-2023  
Table 24 - LBN Brand Shares of Butter and Spreads: % Value 2020-2023  
Table 25 - Distribution of Butter and Spreads by Format: % Value 2018-2023  
Table 26 - Forecast Sales of Butter and Spreads by Category: Volume 2023-2028  
Table 27 - Forecast Sales of Butter and Spreads by Category: Value 2023-2028  
Table 28 - Forecast Sales of Butter and Spreads by Category: % Volume Growth 2023-2028  
Table 29 - Forecast Sales of Butter and Spreads by Category: % Value Growth 2023-2028

### Cheese in Pakistan

#### KEY DATA FINDINGS

##### 2023 DEVELOPMENTS

Cheese enjoys solid growth from urbanisation trend  
New competitors enter the cheese category  
Urban consumers drive cheese consumption

#### PROSPECTS AND OPPORTUNITIES

Cheese faces strong growth potential  
Urbanisation will remain a key driver of cheese consumption  
Grated cheese to become more popular due to the rising importance of convenience

#### CATEGORY DATA

Table 30 - Sales of Cheese by Category: Volume 2018-2023  
Table 31 - Sales of Cheese by Category: Value 2018-2023  
Table 32 - Sales of Cheese by Category: % Volume Growth 2018-2023  
Table 33 - Sales of Cheese by Category: % Value Growth 2018-2023  
Table 34 - Sales of Spreadable Processed Cheese by Type: % Value 2018-2023  
Table 35 - NBO Company Shares of Cheese: % Value 2019-2023  
Table 36 - LBN Brand Shares of Cheese: % Value 2020-2023  
Table 37 - Distribution of Cheese by Format: % Value 2018-2023  
Table 38 - Forecast Sales of Cheese by Category: Volume 2023-2028  
Table 39 - Forecast Sales of Cheese by Category: Value 2023-2028  
Table 40 - Forecast Sales of Cheese by Category: % Volume Growth 2023-2028  
Table 41 - Forecast Sales of Cheese by Category: % Value Growth 2023-2028

### Drinking Milk Products in Pakistan

#### KEY DATA FINDINGS

##### 2023 DEVELOPMENTS

Urbanisation leads shift towards packaged milk  
Nestlé's MilkPak is surpassed by Olper's in drinking milk products  
Milk prices pushed up by inflation

## PROSPECTS AND OPPORTUNITIES

Strong volume growth expected even as prices rise  
Cow's milk to remain preferred choice  
China and Pakistan to join forces and develop the dairy industry

## CATEGORY DATA

Table 42 - Sales of Drinking Milk Products by Category: Volume 2018-2023  
Table 43 - Sales of Drinking Milk Products by Category: Value 2018-2023  
Table 44 - Sales of Drinking Milk Products by Category: % Volume Growth 2018-2023  
Table 45 - Sales of Drinking Milk Products by Category: % Value Growth 2018-2023  
Table 46 - NBO Company Shares of Drinking Milk Products: % Value 2019-2023  
Table 47 - LBN Brand Shares of Drinking Milk Products: % Value 2020-2023  
Table 48 - Distribution of Drinking Milk Products by Format: % Value 2018-2023  
Table 49 - Forecast Sales of Drinking Milk Products Products by Category: Volume 2023-2028  
Table 50 - Forecast Sales of Drinking Milk Products Products by Category: Value 2023-2028  
Table 51 - Forecast Sales of Drinking Milk Products Products by Category: % Volume Growth 2023-2028  
Table 52 - Forecast Sales of Drinking Milk Products Products by Category: % Value Growth 2023-2028

## Yoghurt and Sour Milk Products in Pakistan

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Growing trend towards packaged yoghurts  
Flavoured yoghurt continues to gain traction as consumers look for convenient snacks  
Nestlé Pakistan grows share amid growing competition in the yoghurt category

### PROSPECTS AND OPPORTUNITIES

Sour milk products set to gain popularity  
Introducing different packaging sizes slated to have a positive impact on demand  
Preference for thicker yoghurt limits drinking and flavoured yoghurt

## CATEGORY DATA

Table 53 - Sales of Yoghurt and Sour Milk Products by Category: Volume 2018-2023  
Table 54 - Sales of Yoghurt and Sour Milk Products by Category: Value 2018-2023  
Table 55 - Sales of Yoghurt and Sour Milk Products by Category: % Volume Growth 2018-2023  
Table 56 - Sales of Yoghurt and Sour Milk Products by Category: % Value Growth 2018-2023  
Table 57 - NBO Company Shares of Yoghurt and Sour Milk Products: % Value 2019-2023  
Table 58 - LBN Brand Shares of Yoghurt and Sour Milk Products: % Value 2020-2023  
Table 59 - Distribution of Yoghurt and Sour Milk Products by Format: % Value 2018-2023  
Table 60 - Forecast Sales of Yoghurt and Sour Milk Products by Category: Volume 2023-2028  
Table 61 - Forecast Sales of Yoghurt and Sour Milk Products by Category: Value 2023-2028  
Table 62 - Forecast Sales of Yoghurt and Sour Milk Products by Category: % Volume Growth 2023-2028  
Table 63 - Forecast Sales of Yoghurt and Sour Milk Products by Category: % Value Growth 2023-2028

## Other Dairy in Pakistan

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Coffee whiteners remains most popular other dairy product  
Condensed milk use is limited to desserts  
Competitive landscape intensifies in cream

## PROSPECTS AND OPPORTUNITIES

Other dairy category faces strong growth phase  
Competition to intensify in other dairy category  
Retail distribution to shift towards modern retailers

## CATEGORY DATA

Table 64 - Sales of Other Dairy by Category: Volume 2018-2023  
Table 65 - Sales of Other Dairy by Category: Value 2018-2023  
Table 66 - Sales of Other Dairy by Category: % Volume Growth 2018-2023  
Table 67 - Sales of Other Dairy by Category: % Value Growth 2018-2023  
Table 68 - NBO Company Shares of Other Dairy: % Value 2019-2023  
Table 69 - LBN Brand Shares of Other Dairy: % Value 2020-2023  
Table 70 - Distribution of Other Dairy by Format: % Value 2018-2023  
Table 71 - Forecast Sales of Other Dairy by Category: Volume 2023-2028  
Table 72 - Forecast Sales of Other Dairy by Category: Value 2023-2028  
Table 73 - Forecast Sales of Other Dairy by Category: % Volume Growth 2023-2028  
Table 74 - Forecast Sales of Other Dairy by Category: % Value Growth 2023-2028

## About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link [www.euromonitor.com/dairy-products-and-alternatives-in-pakistan/report](https://www.euromonitor.com/dairy-products-and-alternatives-in-pakistan/report).