

# Entrepreneur India

106-E, Kamla Nagar, New Delhi-110007, India.

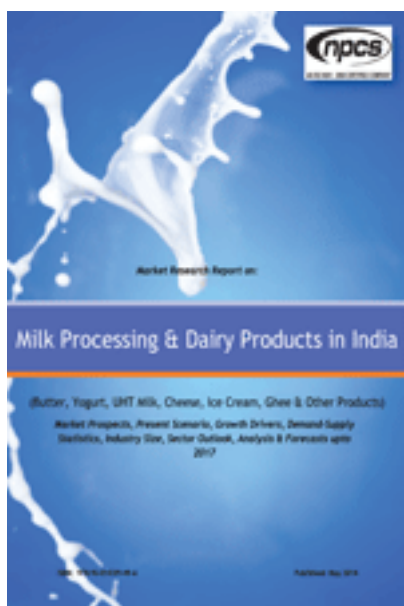
Tel: 91-11-23843955, 23845654, 23845886, +918800733955,

Mobile: +91-9811043595.

Email: [npcs.ei@gmail.com](mailto:npcs.ei@gmail.com), [info@entrepreneurindia.co](mailto:info@entrepreneurindia.co)

Website: [www.entrepreneurIndia.co](http://www.entrepreneurIndia.co)

## Milk Processing & Dairy Products in India (Butter, Yogurt, UHT Milk, Cheese, Ice Cream, Ghee & Other Products)-Market Research Report



<b>Code:</b>	ENI276
<b>Format:</b>	Paperback
<b>Indian Price:</b>	25000
<b>US Price:</b>	600
<b>Pages:</b>	
<b>ISBN:</b>	9789381039496
<b>Publisher:</b>	NIIR PROJECT CONSULTANCY SERVICES

## Market Research Report on Milk Processing & Dairy Products in India (Butter, Yogurt, UHT Milk, Cheese, Ice Cream, Ghee & Other Products) Market Prospects, Present Scenario, Growth Drivers, Demand-Supply Statistics, Industry Size, Sector Outlook, Analysis & Forecasts upto 2017

If you find yourself bewildered by innumerable variants of cheese, flavored yogurts, ice creams or UHT milk, in an expansive section of a modern retail store, then assume that you have hit the much evolved dairy section. Gone are the days when shopping of dairy products just meant choosing between plain curd or Cottage Cheese or basic sandwich spread, today dairy products have outdone their first forms and evolved into much urbanized and modern consumer centric products. To establish a better understanding of market potential of the evolved dairy products in India, Niir Project Consultancy Services has released a new study titled 'Market Research Report on Milk Processing & Dairy Products in India (Butter, Yogurt, UHT Milk, Cheese, Ice Cream, Ghee & Other Products)- Market Prospects, Present Scenario, Growth Drivers, Demand-Supply Statistics, Industry Size, Sector Outlook, Analysis & Forecasts upto 2017'. The report identifies the current & future market prospects of dairy products, the value drivers that will trigger the growth, opportunities & challenges faced by the sector coupled with government initiatives and porters 5 forces analysis of the industry. It helps you classify dairy industry on the basis of its business attractiveness and investment potential which can prove to be a vital link in prudent business decision making. The report provides a comprehensive analysis of the dairy products sector along with the financial details of dairy products companies.

It begins by a brief on global dairy sector and then proceeds to discuss the Indian scenario of dairy industry in detail. It discusses the present scenario, structure and classification of the industry while defining the scope of the report. The sector has moved away from large consumption of milk in unprocessed and fluid form to higher intake of processed dairy products. The known factors for such rising preference for processed dairy products include growing disposable incomes, urbanization, spiraling trend of modern retail and growing acceptability of processed products. The report analyzes the above mentioned factors in growth drivers section supported by graphical representation and forecasts of data points. Growing population of middle class households pose immense opportunities for a host of consumer industries; dairy being one of them. With higher incomes in their pockets and growing western influence on their taste buds, Indian middle class is well equipped to experiment with new products which will have a domino effect on the consumption of dairy products. Also, growing health consciousness among Indian population, low per capita consumption of various dairy products and rising food expenditure will provide ample opportunities for dairy players to seize. Further the report discusses various impediments faced by the dairy players while operating in the industry.

The report in its entirety can prove to be an indispensable tool for assessing the market potential of dairy products in India. It analyzes the demand supply situation in the industry from different angles to enable better understanding of the topic. Demand for dairy products in India is captured by determining the demand for various dairy products as well as total exports. Similarly supply side is taken into account by assessing the production of milk in the country and population of milch animals, the production of various dairy products and lastly by scrutinizing the capital expenditure projects announced in the industry. Moving forward, the report analyzes the attractiveness of the sector by evaluating the status of porters 5 forces prevalent in the industry. Any sector is said to be most attractive when the 5 forces are at their weakest and the report explicates the forces methodically to simplify the analysis. It also lists various initiatives undertaken by the Indian government to assist dairy industry as a whole.

Lastly to give a fair view of the competition in the industry, the report shares information about players operating in the dairy sector. It gives business profiles of key players like Amul, Parag Milk Foods Ltd,

Kwality Ltd and Mother Dairy Fruit & Vegetable Ltd. The next segment provides complete financial details of dairy players in the country like address of registered office, director's name and financial comparison covering balance sheet, profit & loss account and several financial ratios of the players. The report ends with a promising outlook of the sector.

Indian dairy industry has been at the forefront with impressive growth rates and immense potential for an effervescent future abetted by rising demand for value added dairy products in the country. Fluid milk market in India has reached a saturation point and the growing acceptance of value added dairy products has brought winds of change for the industry. The Indian market has witnessed a spur in the demand of value added dairy products like cheese, yogurt, packaged milk and probiotic drinks which has invigorated the growth in overall dairy industry. Rising western influence on Indian food habits, rising concerns about quality of dairy products, health consciousness and spiraling disposable incomes of consumers have resulted in higher demand for value added dairy products in India. Gauging the high demand potential in dairy products industry, a host of international and domestic players have set their foot in the Indian dairy domain. The share of milk processed in total milk produced has shown a healthy rise in the last 3-4 years. We anticipate the quantity of milk processed to cross 107 million tonnes by 2017 from ~66 million tonnes in 2013. Also we expect Indian dairy market to touch INR 6971 billion levels by 2017.

#### Reasons for Buying this Report:

- This research report helps you get a detail picture of the industry by providing overview of the industry along with the market definition, structure and its classification
- The report provides in-depth market analysis covering major growth driving factors for the industry and opportunities & challenges prevalent
- This report helps to understand the present status of the industry by elucidating a comprehensive porter 5 force analysis and scrutiny of the demand – supply situation
- Report provides analysis and in-depth financial comparison of major players/competitors
- The report provides forecasts of key parameters which helps to anticipate the industry performance

#### Our Approach:

- Our research reports broadly cover Indian markets, present analysis, outlook and forecast for a period of five years.
- The market forecasts are developed on the basis of secondary research and are cross-validated through interactions with the industry players
- We use reliable sources of information and databases. And information from such sources is processed by us and included in the report

#### Content:

## Table of Contents

### 1 OVERVIEW

#### 1.1 The Global Dairy Industry

#### 1.2 Indian Dairy Industry

##### 1.2.1 Structure

##### 1.2.2 Classification

### 2 GROWTH DRIVERS

#### 2.1 Rising Acceptance of Value Added Products

##### 2.1.1 Frozen Yogurt

##### 2.1.2 Cheese

##### 2.1.3 Premium Ice Creams

#### 2.2 The Urbanized Indian

#### 2.3 Surge in Organized Food Retail

#### 2.4 Rising Incomes

### 3 OPPORTUNITIES & CHALLENGES

#### 3.1 Opportunities

##### 3.1.1 Low Per Capita Consumption

##### 3.1.2 Growing Health Awareness

##### 3.1.3 Rising Middle Class

##### 3.1.4 Rising Dairy Expenditure

#### 3.2 Challenges

##### 3.2.1 Weak Supply Chain Infrastructure

##### 3.2.2 Fragmented Milk Production

##### 3.2.3 Rising Competition

### 4 REGULATIONS & INITIATIVES

#### 4.1 Initiatives

#### 4.2 Regulations

#### 4.3 Excise/Custom Duty

### 5 DEMAND-SUPPLY SCENARIO

#### 5.1 Demand Analysis

##### 5.1.1 Cheese

##### 5.1.2 Dairy Whiteners/Creamers

##### 5.1.3 Ice Creams

##### 5.1.4 Exports

#### 5.2 Supply Analysis

##### 5.2.1 Milk & Milch Animals

##### 5.2.2 Dairy Products

##### 5.2.3 Capex

### 6 PORTER'S 5 FORCE ANALYSIS

#### 6.1 Bargaining Power of Buyers

#### 6.2 Bargaining Power of Suppliers

#### 6.3 Threat of Substitutes

#### 6.4 Rivalry among Existing Players

#### 6.5 Threat of New Entrants

### 7 KEY PLAYERS

7.1	Key Player Profiles
7.1.1	Amul
7.1.2	Mother Dairy
7.1.3	Parag Milk Foods Pvt Ltd
7.1.4	Kwality Ltd
7.2	Peer Group Financials
7.2.1	Contact Information
7.2.1.1	Registered Office Address
7.2.1.2	Director's Name
7.2.2	Key Financials
7.2.2.1	Plant Location
7.2.2.2	Product Capacity & Sales
7.2.2.3	Raw Material Consumption
7.2.3	Financial Comparison
7.2.3.1	Assets
7.2.3.2	Liabilities
7.2.3.3	Structure of Assets & Liabilities
7.2.3.4	Growth in Assets & Liabilities
7.2.3.5	Income & Expenditure
7.2.3.6	Growth in Income & Expenditure
7.2.3.7	Cash Flow
7.2.3.8	Liquidity Ratios
7.2.3.9	Profitability Ratios
7.2.3.10	Return Ratios
7.2.3.11	Working Capital & Turnover Ratios
8	INDUSTRY SIZE & OUTLOOK
9	ABOUT NPCS
10	DISCLAIMER

## List of Figures & Tables

Figure 1	World's Cow Milk Production (2010-12, In Million Tonnes)
Figure 2	Indian Dairy Industry- Structure
Figure 3	Indian Dairy Industry- Classification
Figure 4	Indian Population- Rural & Urban (In Crores)
Figure 5	Population of India (2008-17, In Millions)
Figure 6	India's Annual Per Capita Income (2008-14, In INR)
Figure 7	Per Capita Consumption of Cheese in India and Other Countries (In Kgs)
Figure 8	Per Capita Consumption of Butter in India & Other Countries (In Kgs)
Figure 9	Per Capita Consumption of Ice-Cream in India & Other Countries (In Litres)
Figure 10	Per Capita Consumption of Skimmed Milk Powder in India & Other Countries (In Kgs)
Figure 11	Indian Middle Class Population (Current-2026)
Figure 12	Share of Dairy in Total Household Expenditure (In Percentage)
Figure 13	Indian Cheese Industry- Market Size (2007-17, In INR Billions)
Figure 14	Demand for Dairy Whiteners & Creamers in India (2007-17, In Thousand Tonnes)
Figure 15	Demand for Ice-Creams in India (2007-17, In Million Tonnes)
Figure 16	Exports of Dairy Products from India (2011-13)

Figure 17 Milk Production in India (FY09-17, In Million Tonnes)  
Figure 18 Livestock Population in India (In Millions, 1997-2007)  
Figure 19 Production of Butter & Ghee in India (2011-17, In Million Tonnes)  
Figure 20 Production of Butter & Ghee by Selected Producers (2009-11, In Tonnes)  
Figure 21 Production of Milk Powder & Condensed Milk by Selected Producers (2009-11, In Tonnes)  
Figure 22 Production of Infant Milk Foods by Selected Producers (2009-12, In Tonnes)  
Figure 23 Kwality Ltd- Shareholding Pattern (% , Mar 2014)  
Figure 24 Indian Dairy Industry- Market Size (2010-17, In INR Billions)  
Figure 25 Quantity of Milk Processed in India (2010-17, In Million Tonnes)

Table 1 International Yogurt Brands in India- Launch Year

Table 2 International Cheese Brands in India

Table 3 International Ice Cream Brands in India- Launch Year

Table 4 Presence of Key Food Retailers in India- Total Stores

Table 5 Excise and Customs Duty Rates for Dairy Products (2013-14)

Table 6 Production of Butter & Ghee by Selected Producers (2009-11)

Table 7 Production of Milk Powder & Condensed Milk by Selected Producers (2009-11)

Table 8 Production of Infant Milk Foods by Selected Producers (2009-12)

Table 9 Upcoming Projects in Dairy Industry

Table 10 Bargaining Power of Buyers

Table 11 Bargaining Power of Suppliers

Table 12 Threat of Substitutes

Table 13 Rivalry among Existing Players

Table 14 Threat of New Entrants

**Sample Chapter:**

## 1 OVERVIEW

Indian dairy industry has been at the forefront with impressive growth rates and immense potential for an effervescent future. The industry has evolved completely with the focus drifting from basic fluid milk and clarified butter & ghee to more advanced value added products like cheese, ice cream and, the more modern, yogurt.

This report aims at simplifying your research to a single step by providing the requisite information handy. It uncovers the industry from various parts like value driver's, growth inhibitors, demand-supply scenario, porters 5 force analysis and other vital statistics.

Firstly let's have a succinct view of the global scenario of the dairy industry.

### 1.1 The Global Dairy Industry

The global dairy industry is composed of a multitude of countries with unique production practices and inimitable consumer markets. The global dairy industry revenues are estimated at ~ USD 300 million in 2011 and are anticipated to cross USD 375 million by 2016.

Figure 1 World's Cow Milk Production (2010-12, In Million Tonnes)

World total cow milk production stood at 620 million tonnes in 2012, of which US was a major contributor with nearly 15% of the total share.

### 1.2 Indian Dairy Industry

Indian dairy industry holds an inimitable space in the country for its high employment potential and for ensuring the availability of nutritious yet affordable food for India's vast population. India is the largest producer as well as largest consumer of milk in the world. It contributes ~17% to the world milk production and consumes almost whole of its milk production by itself.

The tag of largest milk producer was not always in India's kitty. From being milk impoverished nation to the top producer has been an arduous and almost miraculous climb. Such unprecedented rise is docketed to Operation Flood and the historic dairy cooperative movement. During the pre-independence period dairy cooperative movement was limited to a few pockets of Kolkata, Chennai, Bengaluru and Gujarat. But post the independence Government took great initiative in setting up new Dairy Co-operatives in many parts of the country and The National Dairy Development Board (NDDB) was set up to take the lead.

The Operation Flood Programme was undertaken after the National Dairy Development Board had been formed in 1965. The programme was aimed at bringing the shortage of milk supply in the four Metropolitan cities of Kolkata, Mumbai, Chennai and Delhi into agreement with the abundance of milk production in adjoining villages of the cities.

The industry has been retorting positively to the changes in the consumer preferences towards value added products and has been growing at a steady rate.

#### 1.2.1 Structure

In India, only 20% of the milk production takes place in the organized sector while the rest is contributed by the unorganized segment of the industry.

The chart below discusses the structure of Indian dairy industry.

Figure 2 Indian Dairy Industry- Structure

#### 1.2.2 Classification

Figure 3 Indian Dairy Industry- Classification

Scope of the report

NIIR Project Consultancy Services (NPCS) is a reliable name in the industrial world for offering integrated technical consultancy services. Its various services are: Pre-feasibility study, New Project Identification, Project Feasibility and Market Study, Identification of Profitable Industrial Project Opportunities, Preparation of Project Profiles and Pre-Investment and Pre-Feasibility Studies, Market Surveys and Studies, Preparation of Techno-Economic Feasibility Reports, Identification and Selection of Plant and Machinery, Manufacturing Process and or Equipment required, General Guidance, Technical and Commercial Counseling for setting up new industrial projects and industry. NPCS also publishes various technology books, directory, databases, detailed project reports, market survey reports on various industries and profit making business. Besides being used by manufacturers, industrialists and entrepreneurs, our publications are also used by Indian and overseas professionals including project engineers, information services bureau, consultants and consultancy firms as one of the input in their research.

## **NIIR PROJECT CONSULTANCY SERVICES**

106-E, Kamla Nagar, New Delhi-110007, India.

Tel: 91-11-23843955, 23845654, 23845886, +918800733955

Mobile: +91-9811043595

Email: [npcs.ei@gmail.com](mailto:npcs.ei@gmail.com) , [info@entrepreneurindia.co](mailto:info@entrepreneurindia.co)

Website: [www.entrepreneurIndia.co](http://www.entrepreneurIndia.co)