

## **Europe Dairy - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2017 - 2029**

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### **Report description:**

The Europe Dairy Market size is estimated at USD 206.52 billion in 2024, and is expected to reach USD 253.08 billion by 2029, growing at a CAGR of 4.15% during the forecast period (2024-2029).

Strong presence of supermarkets and convenience stores is boosting the dairy sales

- The off-trade retail channel plays a major role in sales of Dairy products in Europe. Among the off-trade channels, supermarkets and hypermarkets accounted for the major market share as they provide them with the added advantage of influencing the consumer's decision to make the purchase among the large variety of products available in the market. This channel is considered the primary sales channel for the sales of dairy products as it holds more than 58.45% of overall sales across Europe.
- In Europe, convenience stores stand in second place in the sales of dairy products, behind Supermarkets and Hypermarkets. In 2022, the sales value of dairy products through convenience stores increased by 2.9% compared to 2021. Many convenience stores stay open for longer hours than traditional retail stores, resulting in more time in the day for the company's products to be sold.
- Online retail is the fastest-growing retail sales channel in the off-trade category. Online retailers, including Amazon, Sainsbury's, Asda, and Tesco, represent the most dominant platforms in terms of the sales of overall groceries, including dairy products, across the country. Milk and cheese have the highest sales through online retail channels. In 2022, cheese accounted for 66.3% of the value share in online retail channels.
- There is an increasing demand for dairy-based recipes from food service channels, further boosting market growth. The dairy sales in the on-trade channel are anticipated to grow by USD 36,245 million in 2024, compared to USD 33,579 million in 2022.

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Well-established dairy farms with adequate milk processing capacity fuels the industry growth

- Germany and Russia are identified as the major markets in the region, followed by the United Kingdom and France. Germany and Russia collectively accounted for 29.40% of the overall dairy products volume sales across the region in 2022. High production of raw milk, rising consumer preference for quality dairy products, and adequate industry regulation to facilitate the manufacturing of these products are identified as the key driving factors. Russia was the fifth-largest producer of raw milk globally in 2021. In 2020, industrialized dairy farms represented 41% of cow inventories, 42% of backyard farms, and small peasant farms accounted for 17% of cow inventories in Russia.
- Belgium and France are identified as the fastest-growing dairy markets in Europe. The Belgium market is anticipated to expand at a CAGR of 4.36% during the forecast period in terms of volume. Milk and cheese are the leading categories in the Belgium market, collectively accounting for 73.27% market volume share in 2022. Milk and cheese are important components of the daily diet in Belgian households. In Belgium, households spent 3.13 billion on dairy products between 1 July 2020 and 30 June 2021. This represented an increase of 5 % compared to the previous year.
- Demand for healthy dairy variants, such as no or reduced sugar, low-fat content, grass-fed, and organic, is anticipated to drive market growth in France during the forecast period. In 2022, Biolait, one of the leading suppliers of raw organic milk in France, represented 30% of organic milk collection in the country. In 2021, grass represented 97% of the feed for heifers and 73% of cow feed at the company's Belin farm.

## Europe Dairy Market Trends

The increase in dairy food consumption is attributed to the growing interest in organic and natural dairy products and rising demand for butter-based snacks

- In 2022, the per capita consumption of dairy in Europe grew by 2.9% compared to 2021. Domestic milk consumption increased due to the COVID-19 outbreak in 2020, which was substantially sustained in 2022. EU consumers have gradually become more interested in consuming milk and other dairy foods produced organically or using other natural techniques as they believe it to be more natural and healthier, such as the "hay milk" produced in Austria and Germany. However, this trend came to a standstill in 2022 due to rising manufacturing costs. By 2025, the per capita consumption of dairy products in Europe is expected to rise by 5.0% from 2023.
- European consumers are moving toward butter-based snack products like cookies and crunchies. As a result, the import volume of butter has increased. EU27 butter imports recovered in 2022 from a decrease in 2020 and 2021 due to Brexit. Butter imports are projected to level off in 2023 by 1.45%. EU butter imports are practically limited to imports from the United Kingdom. In contrast, EU27 butter imports into the GATT WTO tariff rate quota (TRQ) from New Zealand have been limited after Brexit.
- With the rising demand for baked foods, including pizza, baked macaroni with mortadella, and other cheese-based products, the demand for cheese is also rising in the region. Cheese imports into EU27 are limited to Switzerland and the United Kingdom. Imports from the United Kingdom decreased in 2021 as UK exporters faced new customs checks after Brexit. EU cheese imports slightly decreased in 2022 due to decreasing imports from Switzerland. They are projected to remain stable in 2023.

## Europe Dairy Industry Overview

The Europe Dairy Market is fragmented, with the top five companies occupying 16.42%. The major players in this market are Arla

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Foods Amba, Danone SA, Groupe Lactalis, Nestle SA and Unilever PLC (sorted alphabetically).

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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