

Saudi Arabia Dairy Enzymes Market By Type (Lactase, Chymosin, Microbial Rennet, Lipase and Others), By Application (Milk, Cheese, Ice-Cream & Desserts, Yogurt, Whey, Infant Formula and Others), By Source (Plant and Animal & Microorganisms), By Region, Competition, Forecast & Opportunities, 2020-2030F

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Report description:

Saudi Arabia Dairy Enzymes Market was valued at USD 121.66 Million in 2024 and is anticipated to reach USD 196.98 Million in the forecast period with a CAGR of 8.32% through 2030. Dairy enzymes are specialized proteins used in the dairy industry to improve the production, quality, and characteristics of dairy products. These enzymes play a crucial role in various stages of dairy processing, from milk collection and storage to the manufacturing of a wide range of dairy products such as cheese, yogurt, ice cream, and milk-based beverages. Dairy Enzymes Enhance product quality and consistency, Accelerate, and optimize production processes, improve flavor and texture, Enable the creation of specialty and artisanal dairy products, cater to dietary preferences, including lactose-free and vegetarian diets. Dairy enzymes are essential tools for dairy manufacturers seeking to produce high-quality, consistent, and innovative dairy products. They contribute to the diverse and dynamic world of dairy processing, allowing for a wide range of dairy items tailored to consumer preferences and dietary needs. Consumers in Saudi Arabia are becoming more health-conscious and are seeking dairy products that are not only delicious but also provide health benefits. Dairy enzymes are used to create products with reduced fat, lactose, and sugar, meeting the demand for healthier options. There is a growing awareness of lactose intolerance in the region, leading to increased demand for lactose-free and low-lactose dairy products. Dairy enzymes, particularly lactase, are crucial in producing such products. Dairy companies are continually innovating to introduce new and improved dairy products that cater to consumer preferences. Dairy enzymes play a vital role in creating innovative dairy items, including yogurt, cheese, and other dairy-based products. Convenience is a significant driver in the dairy market. Dairy enzymes are used to create dairy products with extended shelf life, improved texture, and enhanced flavor, which adds to consumer convenience. Economic growth in Saudi Arabia has led to increased consumer spending on premium and value-added dairy products, which often rely on dairy enzymes for production.

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Key Market Drivers

Growing Dairy Production

One of the major drivers of the Saudi Arabia dairy enzymes market is the continuous growth in the country's dairy production. Over the past few decades, Saudi Arabia has made significant strides in increasing its dairy output, with the development of advanced dairy farming techniques and infrastructure. The nation's dairy industry has become a key component of its agricultural sector, aiming to fulfill domestic demand and reduce reliance on imports. With major players such as Almarai, one of the largest dairy producers in the region, pushing for growth and increased production, the demand for dairy enzymes has risen correspondingly. In March 2023, in less than 50 years, Saudi Arabia has achieved 120 percent self-sufficiency in dairy products and their derivatives. The Kingdom is now one of the leading dairy exporters, not just in the Middle East, but globally. This accomplishment is the result of well-structured development plans and policies, particularly in the agricultural and livestock sectors. Recent data from the National Committee of Dairy Producers in the Federation of Saudi Chambers (FSC) reveals that dairy consumption has surged by 15%. Saudi Arabia's daily milk production exceeds 7 million liters, equivalent to more than 18 million bottles. Over 10,000 trucks are involved in the transportation and distribution of dairy products daily, and approximately 38,000 retail outlets receive dairy products each day.

Dairy enzymes play a crucial role in enhancing the efficiency and quality of dairy products. They are used to improve processes like cheese-making, milk fermentation, and the production of yogurt and other dairy products. As the demand for diverse and high-quality dairy products increases in Saudi Arabia, dairy manufacturers are increasingly relying on enzymes to ensure optimal product consistency, texture, and flavor. Enzymes are also key to improving shelf life, which is vital given the region's harsh climate and long supply chains. Moreover, Saudi Arabia's climate conditions make it challenging for traditional farming methods, but advancements in technology and innovation in the dairy industry, including enzyme usage, are helping overcome these challenges. Enzyme application in dairy processing is becoming a vital tool in ensuring that products remain of high quality and meet consumer expectations. These factors are expected to continue driving the growth of the dairy enzymes market in the country.

Rising Demand for Processed Dairy Products

The increasing demand for processed dairy products in Saudi Arabia is another major driver of the dairy enzymes market. Processed dairy products such as cheese, yogurt, butter, ice cream, and milk powders are becoming more popular among consumers, driven by changing lifestyles, urbanization, and increased disposable income. Saudi Arabia's growing population, combined with rising consumer preferences for convenience foods, has spurred a surge in the consumption of these products. In January 2024, Saudi food manufacturing giant Saudia Dairy and Foodstuff Company (SADAFCO) aims to enhance its operational and supply chain efficiencies with the launch of a new depot in Makkah, responding to the increasing demand from neighboring markets. Situated within the Saudi Authority for Industrial Cities and Technology Zones (MODON), the new facility is designed to optimize SADAFCO's value chain and seize growth opportunities in the region, as the company has noted a "steady increase" in demand for food supplies from surrounding countries.

Enzymes are essential in processing these dairy products. They help break down lactose in milk, improve texture, enhance flavor, and speed up fermentation processes. For instance, in cheese production, enzymes such as rennet are used to coagulate milk, aiding in the separation of curds and whey, a fundamental step in cheese-making. Similarly, enzymes are used in yogurt fermentation to promote the growth of beneficial bacteria. These processes ensure that dairy products are consistently high-quality, nutritious, and tasty, thereby fueling consumer demand.

The popularity of value-added dairy products has also led to an increased need for specialized enzymes. With Saudi Arabia's dairy industry evolving to cater to more diverse consumer preferences, including lactose-free and low-fat options, enzymes play a crucial role in meeting these new demands. This growing market for processed dairy is likely to continue driving the demand for dairy enzymes in the country.

Supportive Government Policies and Vision 2030

Saudi Arabia's Vision 2030 is a significant factor influencing the country's dairy industry, including the dairy enzymes market. As part of its Vision 2030 plan, the Saudi government aims to diversify its economy, reduce dependence on oil, and invest in sectors such as agriculture, food production, and innovation. The government has been offering incentives to the agricultural sector, encouraging the growth of the dairy industry. This supportive environment is enabling local companies to expand their operations,

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invest in advanced technologies, and enhance their dairy production capabilities. In July 2023, the Public Investment Fund (PIF) announced the launch of SAWANI, a company set to play a key role in the growth of Saudi Arabia's camel dairy industry. SAWANI will also focus on enhancing the local production system to ensure the sector's sustainability. The company aims to take a leadership position in the camel dairy market, contributing to the development of the agricultural and food sectors while helping diversify the local economy in alignment with Saudi Arabia's Vision 2030. In collaboration with the private sector, SAWANI plans to increase the production capacity of camel dairy products. The company will work to elevate local production standards by adopting the latest operational practices and fostering the localization of knowledge and technology within the agricultural and food industries.

Government programs that focus on increasing food security, self-sufficiency in dairy production, and improving the quality of domestic dairy products have created a favorable environment for the use of dairy enzymes. The use of enzymes not only improves dairy processing but also aligns with the country's sustainability and food security goals, which are central to Vision 2030. Additionally, as part of Vision 2030, Saudi Arabia has been striving to improve its agricultural and food processing sectors through partnerships with global experts and the implementation of cutting-edge technologies. The increased investment in the dairy sector has provided opportunities for the expansion of enzyme usage, as companies seek to enhance product quality and processing efficiency. As these initiatives continue to unfold, the demand for dairy enzymes in Saudi Arabia is expected to increase.

Technological Advancements in Enzyme Production

Technological advancements in enzyme production are significantly influencing the growth of the dairy enzymes market in Saudi Arabia. The dairy industry is increasingly relying on biotechnological innovations to improve the production of enzymes. Enzyme manufacturers are adopting new techniques such as genetic engineering, fermentation technology, and recombinant DNA technology to produce more efficient and specialized enzymes for dairy processing. Dairy farming holds significant importance in Saudi Arabia and is a crucial sector within the nation's agricultural industry. In 2021, total milk production reached 34.27 thousand tons, marking a 2.80% increase from 2019, which saw 31.52 thousand tons. The milk production industry in Saudi Arabia is well-positioned to meet domestic demand, reduce reliance on imports, boost milk exports, and support the country's food security objectives. Additionally, it plays a key role in advancing Saudi Arabia's Vision 2030 by helping to minimize ecological impacts. The development of new enzyme formulations that cater to specific dairy products, such as lactose-free milk or specialized cheese, is becoming increasingly important. Enzymes are also being tailored for more efficient use in harsh conditions, such as extreme temperatures and high acidity levels often encountered in the Middle Eastern climate. These advancements have enabled dairy manufacturers in Saudi Arabia to optimize their production processes, enhance product quality, and meet the growing demand for innovative dairy products. Furthermore, the availability of more cost-effective and high-performance enzymes allows dairy manufacturers to increase their productivity while maintaining consistency in product quality. This not only benefits local companies but also makes Saudi dairy products more competitive in the global market, further driving demand for dairy enzymes.

Key Market Challenges

Competition from Dairy Alternatives

A growing number of consumers are choosing dairy alternatives for various reasons, including lactose intolerance, ethical concerns, and dietary preferences (e.g., veganism). This shift in consumer preferences reduces the demand for traditional dairy products that require dairy enzymes. The increasing popularity of dairy alternatives can erode the market share of traditional dairy products, impacting the overall demand for dairy enzymes used in the production of conventional dairy items. Dairy alternatives are continually improving in terms of taste, texture, and nutritional content. This innovation in dairy alternatives can lure consumers away from traditional dairy products, affecting the need for dairy enzymes. Dairy alternatives are often marketed as healthier options, containing less saturated fat and cholesterol. Dairy enzymes are used to enhance the nutritional content of traditional dairy products, but competition from alternatives can influence consumer choices. While lactase enzymes are used in the production of lactose-free traditional dairy products, there is also a growing need for lactase in the production of lactose-free plant-based dairy alternatives. As the plant-based industry continues to expand, investments in research and development of plant-based dairy alternatives are on the rise. This has led to improvements in product quality and sensory attributes, making plant-based options more competitive. Dairy alternatives are becoming more readily available and come in a wide variety of

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flavors and forms, meeting the diverse preferences of consumers. This increased availability and choice can divert demand from traditional dairy products.

Quality Control and Shelf Life

Enzymes are sensitive to various environmental factors such as temperature, pH, and moisture. Maintaining the activity and stability of enzymes during storage and transport is essential. Quality control processes are necessary to verify that enzymes meet specified activity levels. Ensuring consistency in enzyme quality and performance is vital for dairy producers. Variability in enzyme activity can lead to inconsistencies in product quality and may impact the shelf life of dairy products. Enzymes are often derived from microbial sources, and there is a risk of microbial contamination. Quality control measures are essential to prevent contamination and ensure the safety of the enzyme products. Enzymes used in dairy processing must be free from contaminants, such as harmful microorganisms and foreign substances, to avoid product contamination and quality issues in dairy products. Meeting regulatory standards for food safety and quality is a significant challenge. Compliance with local and international regulations is crucial for ensuring the safety and acceptability of dairy products containing enzymes. Enzymes themselves have a shelf life, and it is essential to manage this aspect to prevent enzyme degradation over time. Proper storage conditions, packaging, and labeling are necessary to ensure the longevity of enzyme products. The transportation and storage of enzymes must adhere to specific temperature and humidity conditions to maintain their quality and shelf life. These requirements can be challenging to meet, especially in regions with varying climate conditions.

Key Market Trends

Sustainable and Clean Label Products

Consumers in Saudi Arabia are increasingly looking for dairy products with clean labels. Clean label products are those that contain simple, recognizable ingredients and are free from artificial additives, preservatives, and chemical-sounding components. Enzymes are often considered clean label ingredients, as they are naturally occurring and play a vital role in dairy product development. Consumers are becoming more concerned about food transparency and want to know where their food comes from and how it is made. Enzymes are used in the production of dairy products, and their use is often transparently disclosed on product labels. The clean label trend aligns with the preference for natural ingredients. Enzymes derived from microbial, or plant sources are considered natural and can be used to modify dairy products in a way that maintains consumer acceptance. As consumers seek to minimize their consumption of artificial additives and preservatives, enzymes offer a means to improve product quality without the need for additional chemical agents. This can lead to dairy products that are more appealing to health-conscious consumers. Clean label and sustainability often go hand in hand. Sustainable practices in dairy production, including the use of enzymes, can reduce waste, improve resource efficiency, and minimize the environmental footprint of the dairy industry. Enzymes can help reduce waste by improving the yield and efficiency of dairy processing. Less waste contributes to more sustainable practices and resonates with environmentally conscious consumers. The dairy enzymes market is influenced by ethical and environmental considerations. Consumers are increasingly concerned about the impact of dairy production on animal welfare and the environment. Sustainable and clean label products are seen as more ethical choices. The demand for plant-based and vegan dairy alternatives is on the rise, driven by sustainability and ethical concerns. Enzymes are used to enhance the texture and flavor of these products, aligning with the trend.

Increasing Export Potential

Saudi Arabia's position as one of the largest dairy producers in the Middle East provides an opportunity to expand the export of dairy products, which is another key driver for the dairy enzymes market. The country's dairy industry is increasingly focusing on producing high-quality products that meet international standards, thus gaining a competitive edge in global markets. Enzymes are integral to improving product consistency, shelf life, and overall quality, ensuring that dairy exports meet the demands of international consumers.

The demand for Saudi dairy products in countries within the Gulf Cooperation Council (GCC) region, as well as in markets in Asia and Africa, is growing. To meet this demand, Saudi dairy producers are investing in improving their production processes, including the use of enzymes for more efficient and cost-effective production. The rising export potential is a major driver for the dairy enzymes market as manufacturers strive to meet international standards and expand their presence in global markets. As Saudi Arabia continues to develop its dairy export capabilities, the demand for specialized dairy enzymes, such as those used in the production of long shelf-life products, will grow, further driving the market's expansion.

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Segmental Insights

Type Insights

In 2024, the Saudi Arabia Dairy Enzymes Market largest share was held by Lactase segment and is predicted to continue expanding over the coming years. Lactose is the natural sugar found in milk and dairy products. Many individuals globally, including in Saudi Arabia, are lactose intolerant, which means they have difficulty digesting lactose. Lactase is the enzyme responsible for breaking down lactose into simpler sugars (glucose and galactose) that are easier to digest. Due to the prevalence of lactose intolerance, there is a significant demand for lactase enzymes in the dairy industry to produce lactose-free or low-lactose dairy products. Consumers are becoming increasingly health-conscious, and there is a growing demand for dairy products that are lower in lactose. Lactase allows dairy manufacturers to produce such products, catering to this trend. Dairy companies are constantly innovating to meet consumer demands for specialized and functional dairy products. Lactase enzymes enable the production of various lactose-free or reduced-lactose dairy items, such as milk, yogurt, and cheese, expanding product options and increasing market share. Some consumers may choose to reduce their lactose consumption for dietary reasons or as part of specific diets, such as vegan or plant-based diets. Lactase can be used to produce dairy alternatives, like lactose-free plant-based milk, which aligns with these dietary preferences.

Application Insights

In 2024, the Saudi Arabia Dairy Enzymes Market largest share was held by Milk segment and is predicted to continue expanding over the coming years. Milk is a staple and traditional part of the Saudi Arabian diet. It is widely consumed in various forms, including fresh milk, yogurt, and traditional dairy products like laban. The enduring popularity of milk in the Saudi diet contributes to its dominance in the dairy enzyme market. Milk serves as a primary ingredient for a broad spectrum of dairy products. It is used to make yogurt, cheese, butter, and various desserts. Enzymes are essential in the production of these dairy products, and the milk application segment benefits from this wide range of applications. The dairy industry is continually innovating to meet consumer preferences and demands. The use of enzymes in milk processing allows for the development of new and improved dairy products, from flavored yogurts to specialty cheeses, enhancing the market share of the milk application segment. Milk is recognized for its nutritional value, providing essential nutrients like calcium and protein. The use of enzymes in milk processing can enhance the nutritional content and digestibility of dairy products, which aligns with consumer preferences for healthier options. Lactase enzymes are commonly used in milk processing to reduce lactose content, making milk and milk-based products more suitable for individuals with lactose intolerance. This lactose reduction contributes to the popularity of milk-based dairy products.

Source Insights

In 2024, the Saudi Arabia Dairy Enzymes Market largest share was held by Microorganisms segment in the forecast period and is predicted to continue expanding over the coming years. Microorganisms are a rich source of various enzymes with diverse functionalities. Enzymes derived from microorganisms like bacteria and fungi can be used in a wide range of dairy processing applications, such as cheese production, yogurt fermentation, and milk processing. Microorganisms can be cultivated in large quantities, making them a reliable source for enzyme production. This scalability allows for consistent and cost-effective enzyme production to meet the demands of the dairy industry. Enzymes sourced from microorganisms can be engineered and customized to meet specific requirements in dairy processing, such as improving texture, flavour, or nutritional properties in dairy products. Enzymes derived from well-characterized microorganisms are often considered safe for use in food processing and have received regulatory approvals in many countries, including Saudi Arabia. This ensures that products containing such enzymes meet safety and quality standards. Microbial enzymes tend to offer more consistent performance, as they can be controlled and optimized for specific conditions during the fermentation and production processes.

Regional Insights

The Northern & Central region dominates the Saudi Arabia Dairy Enzymes Market in 2024. Northern and Central regions of Saudi Arabia are home to significant population centers, including cities like Riyadh, Jeddah, and Mecca. These areas have a higher concentration of consumers, including urban populations that typically have greater access to dairy products and dairy processing facilities. The Northern and Central regions are often the economic hubs of the country, with a concentration of businesses, industries, and commercial activities. These regions tend to have a higher demand for dairy products and dairy ingredients, driving the need for dairy enzymes. Dairy processing and production facilities, as well as food and beverage companies, are often

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located in or around major population centers. These facilities require dairy enzymes for various purposes, including improving product quality, extending shelf life, and enhancing production efficiency.

Key Market Players

□□Dow Saudi Arabia

□□Safana Ideal Trading Co. (Futura Ingredients)

□□Juffali-Univar Saudi Arabia Chemicals Company, LLC

□□United National Dairy Co.

□□Arla Foods Saudi Arabia

Report Scope:

In this report, the Saudi Arabia Dairy Enzymes Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

□□ Saudi Arabia Dairy Enzymes Market, By Type:

- o Lactase
- o Chymosin
- o Microbial Rennet
- o Lipase
- o Others

□ Saudi Arabia Dairy Enzymes Market, By Application:

- o Milk
- o Cheese
- o Ice-Cream & Desserts
- o Yogurt
- o Whey
- o Infant Formula
- o Others

□□Saudi Arabia Dairy Enzymes Market, By Source:

- o Plant and Animal
- o Microorganisms

□□Saudi Arabia Dairy Enzymes Market, By Region:

- o Eastern
- o Western
- o Northern & Central
- o Southern

Competitive Landscape

Company Profiles: Detailed analysis of the major companies presents in the Saudi Arabia Dairy Enzymes Market.

Available Customizations:

Saudi Arabia Dairy Enzymes 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).

Table of Contents:

1. Product Overview
 - 1.1. Market Definition
 - 1.2. Scope of the Market
 - 1.2.1. Markets Covered
 - 1.2.2. Years Considered for Study

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- 1.2.3. Key Market Segmentations
- 2. Research Methodology
 - 2.1. Objective of the Study
 - 2.2. Baseline Methodology
 - 2.3. Key Industry Partners
 - 2.4. Major Association and Secondary Sources
 - 2.5. Forecasting Methodology
 - 2.6. Data Triangulation & Validation
 - 2.7. Assumptions and Limitations
- 3. Executive Summary
 - 3.1. Overview of the Market
 - 3.2. Overview of Key Market Segmentations
 - 3.3. Overview of Key Market Players
 - 3.4. Overview of Key Regions/Countries
 - 3.5. Overview of Market Drivers, Challenges, Trends
- 4. Saudi Arabia Dairy Enzymes Market Outlook
 - 4.1. Market Size & Forecast
 - 4.1.1. By Value
 - 4.2. Market Share & Forecast
 - 4.2.1. By Type (Lactase, Chymosin, Microbial Rennet, Lipase and Others)
 - 4.2.2. By Application (Milk, Cheese, Ice-Cream & Desserts, Yogurt, Whey, Infant Formula and Others)
 - 4.2.3. By Source (Plant and Animal & Microorganisms)
 - 4.2.4. By Region (Eastern, Western, Northern & Central, Southern)
 - 4.2.5. By Company (2024)
 - 4.3. Market Map
- 5. Eastern Saudi Arabia Dairy Enzymes Market Outlook
 - 5.1. Market Size & Forecast
 - 5.1.1. By Value
 - 5.2. Market Share & Forecast
 - 5.2.1. By Type
 - 5.2.2. By Application
 - 5.2.3. By Source
- 6. Western Saudi Arabia Dairy Enzymes Market Outlook
 - 6.1. Market Size & Forecast
 - 6.1.1. By Value
 - 6.2. Market Share & Forecast
 - 6.2.1. By Type
 - 6.2.2. By Application
 - 6.2.3. By Source
- 7. Northern & Central Saudi Arabia Dairy Enzymes Market Outlook
 - 7.1. Market Size & Forecast
 - 7.1.1. By Value
 - 7.2. Market Share & Forecast
 - 7.2.1. By Type
 - 7.2.2. By Application
 - 7.2.3. By Source
- 8. Southern Saudi Arabia Dairy Enzymes Market Outlook

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- 8.1. Market Size & Forecast
 - 8.1.1. By Value
- 8.2. Market Share & Forecast
 - 8.2.1. By Type
 - 8.2.2. By Application
 - 8.2.3. By Source
- 9. Market Dynamics
 - 9.1. Drivers
 - 9.2. Challenges
- 10. Market Trends & Developments
 - 10.1. Recent Developments
 - 10.2. Product Launches
 - 10.3. Mergers & Acquisitions
- 11. Policy & Regulatory Landscape
- 12. Saudi Arabia Economic Profile
- 13. Competitive Landscape
 - 13.1. Dow Saudi Arabia
 - 13.1.1. Business Overview
 - 13.1.2. Company Snapshot
 - 13.1.3. Products & Services
 - 13.1.4. Financials (As Reported)
 - 13.1.5. Recent Developments
 - 13.1.6. Key Personnel Details
 - 13.1.7. SWOT Analysis
 - 13.2. Safana Ideal Trading Co. (Futura Ingredients)
 - 13.3. Juffali-Univar Saudi Arabia Chemicals Company, LLC
 - 13.4. United National Dairy Co.
 - 13.5. Arla Foods Saudi Arabia
- 14. Strategic Recommendations
- 15. About Us & Disclaimer

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