

Follow-On Milk Formula Market - Global Industry Size, Share, Trends, Opportunity and Forecast, By Form (Powder, Liquid), By Packaging (Bottles, Pouches), By Distribution Channel (Supermarket & Hypermarket, Convenience Store, Specialty Stores, Online, Others), By Region & Competition, 2020-2030F

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Report description:

Global Follow-On Milk Formula market was valued at USD 45.87 billion in 2024 and is expected to grow to USD 58.01 billion by 2030 with a CAGR of 4.87% during the forecast period. The Follow-On Milk Formula market is driven by several factors, including increasing parental awareness of infant nutrition and the growing number of working mothers who rely on formula as a convenient, nutritious alternative to breast milk. As infants transition to solid foods, follow-on formulas are designed to meet their evolving nutritional needs, offering essential vitamins and minerals to support growth. Also, rising health concerns and the demand for safe, high-quality products have led to innovations in formula formulations, with many brands offering organic, non-GMO, and allergy-friendly options. Urbanization and access to healthcare information also contribute to the market's growth.

Key Market Drivers

Rising Awareness of Infant Nutrition

Rising awareness of infant nutrition is a significant driver in the growth of the follow-on milk formula market. As a part of this, according to UNICEF, as of May 2023, undernutrition is responsible for over half of all fatalities in children under the age of five; it increases the incidence and severity of common diseases, as well as the time it takes for recovery. As more parents recognize the importance of providing proper nutrition for their early development, they are increasingly seeking products that support healthy growth. Educational campaigns, healthcare professionals, and online resources have empowered parents with information about the benefits and necessity of balanced nutrition during the first years of life. This heightened awareness leads parents to make informed decisions about infant feeding, particularly when breastfeeding is not an option or is supplemented with formulas. This rising awareness is further fueling demand for follow-on milk formulas that provide complete and safe nutritional support during the infant's transition to solid foods.

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Increase In Birth Rate Across the Globe

The increase in birth rates across the globe is a significant driver for the growth of the follow-on milk formula market. As a part of this, according to a recent study, as of 2024, Niger had the world's highest birth rate, at 46.6 births per 1,000 people. Angola, Benin, Mali, and Uganda followed. Except for Afghanistan, all the world's top 20 birth rates were in Sub-Saharan Africa. As more infants are born, the demand for infant nutrition products, including follow-on formula, rises. In many countries, the rise in birth rates is driven by a combination of factors, such as improved healthcare, better living conditions, and a higher focus on family planning. As families grow, parents often look for convenient and reliable nutritional alternatives, especially when breastfeeding is not possible or is supplemented with formula. The combination of rising birth rates and heightened awareness of infant nutrition continues to drive market growth.

Product Upgradation by Key Players

Product upgradation by key players is a major driver in the growth of the follow-on milk formula market. Leading brands continuously innovate and upgrade their products to meet evolving consumer demands for higher quality, more nutritionally balanced formulas. As a part of this, as of July 2022, Danone has developed the new dairy & plants blend baby formula, based on over 50 years of extensive breastfeeding research and expertise pioneering plant-based products. The novel infant formula is the first to be designed expressly for a vegetarian diet, as well as the first blended formula for healthy babies in which soy provides more than half of the protein required. These upgrades often include improved formulations with added vitamins, minerals, and essential fatty acids that support infant growth and cognitive development. Also, advancements such as the incorporation of probiotics, prebiotics, and DHA (docosahexaenoic acid) are becoming more common, as parents seek products that promote better digestion, immune function, and brain health for their babies.

Key Market Challenges

Supply Chain Disruptions

Supply chain disruptions are a significant challenge in the follow-on milk formula market. The global supply chain for infant formula is highly complex, involving sourcing raw materials, production, packaging, and distribution across various regions. As a part of this, as of February 2022, Abbott Nutrition voluntarily recalled powdered infant formula from its Sturgis, Michigan factory due to bacterial contamination, causing widespread supply interruptions. On the same day, the FDA urged customers not to use the recalled formula. Factors such as geopolitical tensions, natural disasters, and pandemics (like COVID-19) can lead to delays in the availability of key ingredients, manufacturing capabilities, and transportation logistics, disrupting the timely delivery of products to market. For example, shortages in vital ingredients like lactose, whey, and vegetable oils can affect production schedules and lead to product scarcity.

Fluctuating Prices of Raw Material

Fluctuating prices of raw materials pose a significant challenge in the follow-on milk formula market. The production of infant formula relies on several key ingredients, including milk proteins, lactose, vegetable oils, and vitamins. Prices for these raw materials can be highly volatile due to factors such as agricultural yields, climate conditions, and market demand. For example, milk prices can fluctuate based on the supply and demand dynamics in the dairy industry, while vegetable oils may be affected by crop failures or trade restrictions. These price fluctuations create financial uncertainty for manufacturers, leading to higher production costs. As raw material prices rise, manufacturers may face difficulties in maintaining profit margins or may need to increase the prices of their formulas, potentially making products less affordable for consumers.

Key Market Trends

Growing Demand for Natural & Organic Formulas

As parents become more health-conscious, there is a noticeable shift towards organic and natural follow-on milk formulas. Organic formulas, which are free from synthetic pesticides, fertilizers, and hormones, are increasingly viewed as safer and healthier alternatives to conventional formulas. Parents are more selective about the products they choose for their babies, favoring those with clean, transparent labels that provide information about the ingredients and their sources. Non-GMO formulations are also gaining popularity, as concerns over genetically modified organisms continue to grow. With this growing preference, manufacturers are responding by offering a wide variety of organic, non-GMO, and clean-label formula options.

Rising Demand for Sustainable & Eco-Friendly Packaging

The rising demand for sustainable and eco-friendly packaging is a significant trend in the follow-on milk formula market, driven by

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increasing consumer awareness of environmental issues. Parents and consumers are becoming more conscious of the ecological impact of the products they purchase, including the packaging used. As a result, there is growing pressure on formula manufacturers to adopt packaging solutions that are recyclable, biodegradable, or made from renewable materials. Brands are shifting away from single-use plastics and moving toward paper-based, plant-based, or glass packaging options that align with sustainability goals. This trend reflects broader shifts in consumer behaviour toward more sustainable products across industries, influencing packaging choices in the follow-on milk formula market.

Rising Demand for Functional Ingredients

The rising demand for functional ingredients in follow-on milk formula is a key trend driven by parents' growing focus on the overall health and development of their babies. Functional ingredients like prebiotics, probiotics, DHA (docosahexaenoic acid), ARA (arachidonic acid), and omega-3 fatty acids are becoming increasingly popular due to their proven benefits in supporting immune health, cognitive development, and gut health in infants. Prebiotics and probiotics help promote a healthy digestive system and bolster the infant's immune function, while DHA and ARA are crucial for brain and eye development. This trend aligns with a broader global focus on health and wellness, where functional foods and ingredients play an essential role in ensuring optimal infant nutrition.

Segmental Insights

Distribution Channel Insights

Supermarket & Hypermarket dominated the global Follow-On Milk Formula market due to their widespread accessibility, large customer base, and extensive product offerings. These retail outlets provide a convenient one-stop shopping experience for parents, offering a wide variety of follow-on milk formulas from various brands, catering to different needs such as organic, lactose-free, or hypoallergenic formulas. The ability to compare products in-store, coupled with the availability of discounts and promotions, further drives consumer purchasing decisions. Also, these large-scale retailers benefit from a vast distribution network, ensuring consistent product availability across regions. The prominence of supermarkets and hypermarkets in the distribution of follow-on milk formula solidifies their role as a key driver in the market's growth.

Regional Insights

North America dominated the global Follow-On Milk Formula market, driven by high consumer demand for infant nutrition products, advanced healthcare systems, and a growing awareness of the importance of early childhood nutrition. In the U.S. and Canada, an increasing number of working mothers, along with rising disposable incomes, has led to greater reliance on formula as a supplement to breastfeeding. Also, consumers are becoming more health-conscious, seeking organic, non-GMO, and allergen-free formulas, further propelling market growth.

Key Market Players

- ☐ Nestle S.A.
- ☐ Danone S.A.
- ☐ Kendal Nutricare
- ☐ Holle Baby Food AG
- ☐ France Lait
- ☐ Nature One Dairy Pty Ltd
- ☐ AGRANA Beteiligungs-AG
- ☐ Lactalis Nutrition Sante
- ☐ Abbott Laboratories
- ☐ HIPP International

Report Scope:

In this report, the Global Follow-On Milk Formula Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

☐ Follow-On Milk Formula Market, By Form:

- o Powder
- o Liquid

☐ Follow-On Milk Formula Market, By Packaging Type:

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- o Bottles
- o Pouches

☐☐ Follow-On Milk Formula Market, By Distribution Channel:

- o Supermarket & Hypermarket
- o Convenience Store
- o Specialty Stores
- o Online
- o Others

☐☐ Follow-On Milk Formula Market, By Region:

- o North America
 - ☐ United States
 - ☐ Canada
 - ☐ Mexico
- o Asia-Pacific
 - ☐ China
 - ☐ Japan
 - ☐ India
 - ☐ Australia
 - ☐ South Korea
 - ☐ Indonesia
- o Europe
 - ☐ France
 - ☐ United Kingdom
 - ☐ Italy
 - ☐ Germany
 - ☐ Spain
- o South America
 - ☐ Argentina
 - ☐ Colombia
 - ☐ Brazil
- o Middle East & Africa
 - ☐ South Africa
 - ☐ Saudi Arabia
 - ☐ UAE
 - ☐ Turkey

Competitive Landscape

Company Profiles: Detailed analysis of the major companies presents in the Global Follow-On Milk Formula Market.

Available Customizations:

Global Follow-On Milk Formula 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).

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