

Ketogenic Diet - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

Market Report | 2025-08-01 | 100 pages | Mordor Intelligence

AVAILABLE LICENSES:

- Single User License \$4750.00
- Team License (1-7 Users) \$5250.00
- Site License \$6500.00
- Corporate License \$8750.00

Report description:

Ketogenic Diet Market Analysis

The ketogenic food products market size is valued at USD 12.81 billion in 2025 and is forecast to reach USD 16.52 billion by 2030, advancing at a 5.16% CAGR. This growth is attributed to increasing awareness of metabolic health, a global shift toward low-carb dietary preferences, and continuous product advancements that enhance the convenience of ketogenic consumption. Strategic investments in functional ingredients, such as medium-chain triglycerides (MCTs) and exogenous ketones, are driving portfolio diversification. Additionally, regulatory developments in the U.S. and Europe are improving labeling transparency and creating new opportunities for health-related claims. North America continues to dominate the market due to strong brand presence, while the Asia-Pacific region is experiencing faster growth, driven by rising disposable incomes, increasing diabetes prevalence, and rapidly evolving retail infrastructure. Furthermore, the expansion of e-commerce platforms and direct-to-consumer models is enhancing market dynamics by offering a wider product range and enabling tailored nutrition solutions.

Global Ketogenic Diet Market Trends and Insights

Rising prevalence of obesity and lifestyle disorders

As global obesity rates continue to climb, the demand for ketogenic food products is witnessing significant growth. The impact of this metabolic challenge extends beyond weight management, driving the need for solutions that address insulin resistance and other metabolic disorders. In 2024, 1 billion individuals were affected by obesity, with one in eight deaths from non-communicable

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scott's-international.com

www.scott's-international.com

diseases attributed to being overweight or obese . Clinical studies have demonstrated the effectiveness of ketogenic diets in addressing obesity, outperforming traditional low-fat diets in promoting weight loss due to improved appetite regulation and enhanced insulin sensitivity. Dietary interventions, such as the ketogenic diet, are increasingly viewed as cost-efficient and proactive strategies to combat obesity, especially when compared to the high costs associated with managing obesity-related chronic conditions. As consumers prioritize effective, scientifically supported, and often fast-acting weight management solutions, the ketogenic diet has positioned itself as a leading choice in the market.

Expanding retail availability of keto-labelled SKUs

Ketogenic products, which were previously limited to niche health stores, have now transitioned into mainstream supermarkets, driven by accelerated retail penetration. This significant shift has been supported by regulatory advancements, particularly the FDA's GRAS (Generally Recognized as Safe) approval of D-β-hydroxybutyrate. This regulatory approval permits its inclusion in sports and nutritional beverages at concentrations of up to 6 grams per serving, paving the way for broader product development and market acceptance. Retailers are showcasing a strategic commitment to the ketogenic category by introducing dedicated ketogenic sections and employing cross-merchandising strategies with diabetes management products. Additionally, advancements in supply chain management have played a pivotal role in ensuring consistent product availability. These improvements have effectively mitigated previous challenges, such as limited product supply and inconsistent quality standards, thereby fostering greater consumer adoption and trust in the category.

Health-risk concerns and nutritional deficiencies

Ongoing debates within the medical community regarding the long-term safety of the ketogenic diet continue to limit its widespread adoption, particularly among healthcare providers who significantly influence patient dietary decisions. Concerns over potential cardiovascular risks, such as the suppression of T-regulatory cells and the promotion of cardiac fibrosis due to inhibited mitochondrial function, have reinforced cautious approaches within the industry. This conservative stance is further supported by the European Food Safety Authority's (EFSA) rejection of β-hydroxybutyrate salts as a novel food, citing insufficient safety data, despite their prevalent use in ketogenic supplements. Nutritional adequacy remains a key issue, with challenges related to potential micronutrient deficiencies and maintaining ketosis without compromising balanced nutrition. Healthcare provider skepticism results in limited clinical endorsements, restricting market growth among medically supervised consumer segments.

Other drivers and restraints analyzed in the detailed report include:

Growing adoption among athletes and fitness enthusiasts / Growing demand for low-carb and clean label foods / Strict dietary compliance required /

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

In 2024, supplements accounted for 45.21% of the ketogenic food products market, reflecting strong consumer demand for MCT oil, ketone salts, and esters, which are essential for simplifying ketosis management. With advancements in formulation science improving flavor and digestibility, the market for ketogenic supplements is experiencing steady growth. The beverage segment is projected to lead the market with a 6.56% CAGR (2025-2030), driven by the increasing popularity of ready-to-drink protein shakes and ketone-rich energy drinks that combine convenience with a sports-nutrition focus.

Snacks are achieving consistent growth by converting traditional products like bars, cheese crisps, and nut mixes into low-net-carb options that cater to busy, on-the-go consumers. Dairy and plant-based alternatives are gaining traction through

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

innovative high-fat, low-lactose formulations designed for lactose-sensitive individuals. Additionally, emerging sub-segments, such as glycerol tri-acetoacetate-based meal replacements, are expanding the range of functional ingredients, signaling continued diversification within the ketogenic food products market.

The Ketogenic Diet Market Report is Segmented by Product Type (Supplements, Snacks, Beverages, and More), by Nature (Conventional and Organic), by Distribution Channel (Supermarkets/Hypermarkets, Specialty Nutrition Stores, Pharmacy/Drug Stores, and More), and by Geography (North America, Europe, Asia-Pacific, South America, and the Middle East and Africa). The Market Forecasts are Provided in Terms of Value (USD).

Geography Analysis

In 2024, North America captured a leading 39.4% share of the ketogenic food products market, driven by strong consumer awareness, clear FDA labeling standards, and a well-established retail distribution network. The adoption of medical-grade product lines continues to grow, supported by clinical use for epilepsy and expanding applications in glucose management. Intense competition drives innovation, exemplified by Nestle Health Science's COGNIKET-MCI clinical trial, which focuses on cognitive support through ketogenic formulations.

Asia-Pacific is the fastest-growing region, recording a 7.59% CAGR, fueled by increasing diabetes prevalence and rising disposable incomes. According to the International Diabetes Federation, China's adult diabetes prevalence reached 11.9% in 2024. Regulatory advancements across ASEAN markets are streamlining nutraceutical pathways, boosting the adoption of functional keto SKUs. Strategic partnerships, such as the Nestle India-Dr. Reddy's joint ventures are accelerating the development of localized formulations tailored to regional preferences and regulatory requirements.

Europe remains a significant but mature market, shaped by stringent Novel Food regulations. In February 2025, EFSA introduced updated guidance aimed at reducing review timelines while maintaining safety standards, encouraging the development of next-generation ketone ingredients. The demand for sustainability and clean-label products aligns well with premium keto claims. However, Europe's diverse culinary traditions necessitate country-specific marketing strategies to achieve success in the ketogenic food products market.

List of Companies Covered in this Report:

Nestle S.A. / Perfect Keto LLC / Bulletproof 360 Inc. / Zenwise Health / Know Brainer Foods LLC / Ancient Brands, LLC. / Dang Foods Co. / Real Ketones / KetoLogic / KetoSports / Atkins Nutritionals, Inc. / SlimFast / Herbalife Nutrition Ltd. / Keto and Co / Ketone-IQ / Keto Chow, LLC / TDN Nutrition / Kiss My Keto / BHU Foods / Bajo Foods Private Limited /

Additional Benefits:

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

Table of Contents:

1 INTRODUCTION

1.1 Study Assumptions and Market Definition

1.2 Scope of the Study

2 RESEARCH METHODOLOGY

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

3 EXECUTIVE SUMMARY

4 MARKET LANDSCAPE

4.1 Market Overview

4.2 Market Drivers

- 4.2.1 Rising prevalence of obesity and lifestyle disorders
- 4.2.2 Expanding retail availability of keto-labelled SKUs
- 4.2.3 Growing adoption among athletes and fitness enthusiasts
- 4.2.4 Growing demand for low-carb and clean label foods
- 4.2.5 Expansion of e-commerce and DTC channels
- 4.2.6 Innovation in product offerings drives the market

4.3 Market Restraints

- 4.3.1 Health-risk concerns and nutritional deficiencies
- 4.3.2 Strict dietary compliance required
- 4.3.3 High cost of keto products limits the growth
- 4.3.4 Competition from emerging metabolic diets

4.4 Regulatory Landscape

4.5 Technological Outlook

4.6 Porter's Five Forces Analysis

- 4.6.1 Threat of New Entrants
- 4.6.2 Bargaining Power of Buyers
- 4.6.3 Bargaining Power of Suppliers
- 4.6.4 Threat of Substitutes
- 4.6.5 Intensity of Competitive Rivalry

5 MARKET SIZE AND GROWTH FORECASTS (VALUE)

5.1 By Product Type

5.1.1 Supplements

- 5.1.1.1 Ketone Salts
- 5.1.1.2 Ketone Esters
- 5.1.1.3 MCT Oil
- 5.1.1.4 Others

5.1.2 Snacks

- 5.1.2.1 Bars
- 5.1.2.2 Nuts and Seed Mixes
- 5.1.2.3 Cookies and Brownies
- 5.1.2.4 Meat and Cheese Snacks

5.1.3 Beverages

- 5.1.3.1 Ready-To-Drinks
 - 5.1.3.2 Shakes
 - 5.1.3.3 Coffee and Creamers
- ###### 5.1.4 Dairy and Dairy Alternatives
- ###### 5.1.5 Others

5.2 By Distribution Channel

- 5.2.1 Supermarkets/Hypermarkets
- 5.2.2 Specialty Nutrition Stores
- 5.2.3 Pharmacy/Drug Stores

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- 5.2.4 Convenience Stores
- 5.2.5 Online Retail Stores
- 5.2.6 Others
- 5.3 By Nature
 - 5.3.1 Conventional
 - 5.3.2 Organic
- 5.4 By Geography
 - 5.4.1 North America
 - 5.4.1.1 United States
 - 5.4.1.2 Canada
 - 5.4.1.3 Mexico
 - 5.4.1.4 Rest of North America
 - 5.4.2 Europe
 - 5.4.2.1 United Kingdom
 - 5.4.2.2 Germany
 - 5.4.2.3 France
 - 5.4.2.4 Italy
 - 5.4.2.5 Spain
 - 5.4.2.6 Netherlands
 - 5.4.2.7 Poland
 - 5.4.2.8 Belgium
 - 5.4.2.9 Sweden
 - 5.4.2.10 Rest of Europe
 - 5.4.3 Asia-Pacific
 - 5.4.3.1 China
 - 5.4.3.2 Japan
 - 5.4.3.3 India
 - 5.4.3.4 Australia
 - 5.4.3.5 Indonesia
 - 5.4.3.6 South Korea
 - 5.4.3.7 Thailand
 - 5.4.3.8 Singapore
 - 5.4.3.9 Rest of Asia-Pacific
 - 5.4.4 South America
 - 5.4.4.1 Brazil
 - 5.4.4.2 Argentina
 - 5.4.4.3 Colombia
 - 5.4.4.4 Chile
 - 5.4.4.5 Peru
 - 5.4.4.6 Rest of South America
 - 5.4.5 Middle East and Africa
 - 5.4.5.1 South Africa
 - 5.4.5.2 Saudi Arabia
 - 5.4.5.3 United Arab Emirates
 - 5.4.5.4 Nigeria
 - 5.4.5.5 Egypt
 - 5.4.5.6 Morocco

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

5.4.5.7 Turkey

5.4.5.8 Rest of Middle East and Africa

6 COMPETITIVE LANDSCAPE

6.1 Market Concentration

6.2 Strategic Moves

6.3 Market Share Analysis

6.4 Company Profiles (includes Global level Overview, Market level overview, Core Segments, Financials as available, Strategic Information, Market Rank/Share for key companies, Products and Services, and Recent Developments)

6.4.1 Nestle S.A.

6.4.2 Perfect Keto LLC

6.4.3 Bulletproof 360 Inc.

6.4.4 Zenwise Health

6.4.5 Know Brainer Foods LLC

6.4.6 Ancient Brands, LLC.

6.4.7 Dang Foods Co.

6.4.8 Real Ketones

6.4.9 KetoLogic

6.4.10 KetoSports

6.4.11 Atkins Nutritionals, Inc.

6.4.12 SlimFast

6.4.13 Herbalife Nutrition Ltd.

6.4.14 Keto and Co

6.4.15 Ketone-IQ

6.4.16 Keto Chow, LLC

6.4.17 TDN Nutrition

6.4.18 Kiss My Keto

6.4.19 BHU Foods

6.4.20 Bajo Foods Private Limited

7 MARKET OPPORTUNITIES AND FUTURE OUTLOOK

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Ketogenic Diet - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

Market Report | 2025-08-01 | 100 pages | Mordor Intelligence

To place an Order with Scotts International:

- Print this form
- Complete the relevant blank fields and sign
- Send as a scanned email to support@scott's-international.com

ORDER FORM:

Select license	License	Price
	Single User License	\$4750.00
	Team License (1-7 Users)	\$5250.00
	Site License	\$6500.00
	Corporate License	\$8750.00
		VAT
		Total

*Please circle the relevant license option. For any questions please contact support@scott's-international.com or 0048 603 394 346.

** VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*	<input type="text"/>	Phone*	<input type="text"/>
First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Job title*	<input type="text"/>		
Company Name*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>
Address*	<input type="text"/>	City*	<input type="text"/>
Zip Code*	<input type="text"/>	Country*	<input type="text"/>
		Date	<input type="text" value="2026-02-27"/>
		Signature	

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scott's-international.com

www.scott's-international.com

