



Euromonitor
International

Dairy Products and Alternatives in Pakistan

August 2025

Table of Contents

Dairy Products and Alternatives in Pakistan

EXECUTIVE SUMMARY

Dairy products and alternatives in 2025: The big picture

Key trends in 2025

Competitive Landscape

Channel developments

What next for dairy products and alternatives?

MARKET DATA

Table 1 - Sales of Dairy Products and Alternatives by Category: Value 2020-2025

Table 2 - Sales of Dairy Products and Alternatives by Category: % Value Growth 2020-2025

Table 3 - NBO Company Shares of Dairy Products and Alternatives: % Value 2021-2025

Table 4 - LBN Brand Shares of Dairy Products and Alternatives: % Value 2022-2025

Table 5 - Penetration of Private Label by Category: % Value 2020-2025

Table 6 - Distribution of Dairy Products and Alternatives by Format: % Value 2020-2025

Table 7 - Forecast Sales of Dairy Products and Alternatives by Category: Value 2025-2030

Table 8 - Forecast Sales of Dairy Products and Alternatives by Category: % Value Growth 2025-2030

DISCLAIMER

SOURCES

Summary 1 - Research Sources

Baby Food in Pakistan

KEY DATA FINDINGS

2025 DEVELOPMENTS

Healthy value and volume growth in 2025

Nestlé continues to dominate

Health and beauty specialists have commanding lead, but e-commerce gains most value share

PROSPECTS AND OPPORTUNITIES

Growing middle class and urbanisation drive growth

Increasing awareness of importance of nutrition for babies

Digital space continues to gain influence

CATEGORY DATA

Table 9 - Sales of Baby Food by Category: Volume 2020-2025

Table 10 - Sales of Baby Food by Category: Value 2020-2025

Table 11 - Sales of Baby Food by Category: % Volume Growth 2020-2025

Table 12 - Sales of Baby Food by Category: % Value Growth 2020-2025

Table 13 - Sales of Growing-Up Milk Formula by Age: % Value 2020-2025

Table 14 - NBO Company Shares of Baby Food: % Value 2021-2025

Table 15 - LBN Brand Shares of Baby Food: % Value 2022-2025

Table 16 - Distribution of Baby Food by Format: % Value 2020-2025

Table 17 - Forecast Sales of Baby Food by Category: Volume 2025-2030

Table 18 - Forecast Sales of Baby Food by Category: Value 2025-2030

Table 19 - Forecast Sales of Baby Food by Category: % Volume Growth 2025-2030

Table 20 - Forecast Sales of Baby Food by Category: % Value Growth 2025-2030

Butter and Spreads in Pakistan

KEY DATA FINDINGS

2025 DEVELOPMENTS

Modest growth in 2025

Competitive landscape stable in 2025

Small local grocers continue to lead, though hypermarkets gain most value share

PROSPECTS AND OPPORTUNITIES

Growth in foodservice channel

Focus on health-driven product innovation

Legislative change leads to healthier offerings, while discussions are ongoing about reducing sales tax

CATEGORY DATA

Table 21 - Sales of Butter and Spreads by Category: Volume 2020-2025

Table 22 - Sales of Butter and Spreads by Category: Value 2020-2025

Table 23 - Sales of Butter and Spreads by Category: % Volume Growth 2020-2025

Table 24 - Sales of Butter and Spreads by Category: % Value Growth 2020-2025

Table 25 - NBO Company Shares of Butter and Spreads: % Value 2021-2025

Table 26 - LBN Brand Shares of Butter and Spreads: % Value 2022-2025

Table 27 - Distribution of Butter and Spreads by Format: % Value 2020-2025

Table 28 - Forecast Sales of Butter and Spreads by Category: Volume 2025-2030

Table 29 - Forecast Sales of Butter and Spreads by Category: Value 2025-2030

Table 30 - Forecast Sales of Butter and Spreads by Category: % Volume Growth 2025-2030

Table 31 - Forecast Sales of Butter and Spreads by Category: % Value Growth 2025-2030

Cheese in Pakistan

KEY DATA FINDINGS

2025 DEVELOPMENTS

Positive performance in 2025

Adam's Milk Foods remains in the lead

Small local grocers continue to lead, but lose value share

PROSPECTS AND OPPORTUNITIES

Increasing demand for flavoured cheese, as well as on-the-go formats

Potential to focus messaging around nutrition

Export potential for halal-certified cheese

CATEGORY DATA

Table 32 - Sales of Cheese by Category: Volume 2020-2025

Table 33 - Sales of Cheese by Category: Value 2020-2025

Table 34 - Sales of Cheese by Category: % Volume Growth 2020-2025

Table 35 - Sales of Cheese by Category: % Value Growth 2020-2025

Table 36 - Sales of Spreadable Cheese by Type: % Value 2020-2025

Table 37 - Sales of Soft Cheese by Type: % Value 2020-2025

Table 38 - Sales of Hard Cheese by Type: % Value 2020-2025

Table 39 - NBO Company Shares of Cheese: % Value 2021-2025

Table 40 - LBN Brand Shares of Cheese: % Value 2022-2025

Table 41 - Distribution of Cheese by Format: % Value 2020-2025

Table 42 - Forecast Sales of Cheese by Category: Volume 2025-2030

Table 43 - Forecast Sales of Cheese by Category: Value 2025-2030

Table 44 - Forecast Sales of Cheese by Category: % Volume Growth 2025-2030

Table 45 - Forecast Sales of Cheese by Category: % Value Growth 2025-2030

Drinking Milk Products in Pakistan

KEY DATA FINDINGS

2025 DEVELOPMENTS

Shift from loose to packaged milk
Nestlé and FrieslandCampina Engro continue to lead
E-commerce and q-commerce gain most value share

PROSPECTS AND OPPORTUNITIES

With consumers demanding higher quality, investment in dairy sector could yield results
Storytelling builds connections with consumers
Increasing focus on fortified and functional benefits of drinking milk

CATEGORY DATA

Table 46 - Sales of Drinking Milk Products by Category: Volume 2020-2025
Table 47 - Sales of Drinking Milk Products by Category: Value 2020-2025
Table 48 - Sales of Drinking Milk Products by Category: % Volume Growth 2020-2025
Table 49 - Sales of Drinking Milk Products by Category: % Value Growth 2020-2025
Table 50 - NBO Company Shares of Drinking Milk Products: % Value 2021-2025
Table 51 - LBN Brand Shares of Drinking Milk Products: % Value 2022-2025
Table 52 - Distribution of Drinking Milk Products by Format: % Value 2020-2025
Table 53 - Forecast Sales of Drinking Milk Products by Category: Volume 2025-2030
Table 54 - Forecast Sales of Drinking Milk Products by Category: Value 2025-2030
Table 55 - Forecast Sales of Drinking Milk Products by Category: % Volume Growth 2025-2030
Table 56 - Forecast Sales of Drinking Milk Products by Category: % Value Growth 2025-2030

Yoghurt and Sour Milk Products in Pakistan

KEY DATA FINDINGS

2025 DEVELOPMENTS

Flavoured yoghurt increasingly popular
Nestlé continues to hold commanding position
Small local grocers dominate distribution

PROSPECTS AND OPPORTUNITIES

Degree of premiumisation over forecast period
Increasing focus on health benefits of yoghurt and sour milk products
Sustainability moves higher up agenda

CATEGORY DATA

Table 57 - Sales of Yoghurt and Sour Milk Products by Category: Volume 2020-2025
Table 58 - Sales of Yoghurt and Sour Milk Products by Category: Value 2020-2025
Table 59 - Sales of Yoghurt and Sour Milk Products by Category: % Volume Growth 2020-2025
Table 60 - Sales of Yoghurt and Sour Milk Products by Category: % Value Growth 2020-2025
Table 61 - Sales of Flavoured Yoghurt by Flavour: Rankings 2020-2025
Table 62 - NBO Company Shares of Yoghurt and Sour Milk Products: % Value 2021-2025
Table 63 - LBN Brand Shares of Yoghurt and Sour Milk Products: % Value 2022-2025
Table 64 - Distribution of Yoghurt and Sour Milk Products by Format: % Value 2020-2025
Table 65 - Forecast Sales of Yoghurt and Sour Milk Products by Category: Volume 2025-2030
Table 66 - Forecast Sales of Yoghurt and Sour Milk Products by Category: Value 2025-2030
Table 67 - Forecast Sales of Yoghurt and Sour Milk Products by Category: % Volume Growth 2025-2030
Table 68 - Forecast Sales of Yoghurt and Sour Milk Products by Category: % Value Growth 2025-2030

KEY DATA FINDINGS

2025 DEVELOPMENTS

Tea whiteners continue to dominate other dairy

No change in competitive landscape

Small local grocers continue to dominate, though modern grocery retailers gain value share year-on-year

PROSPECTS AND OPPORTUNITIES

Shift towards local production

Focus on making other dairy healthier

Advances in technology drive efficiencies and improving quality

CATEGORY DATA

Table 69 - Sales of Other Dairy by Category: Volume 2020-2025

Table 70 - Sales of Other Dairy by Category: Value 2020-2025

Table 71 - Sales of Other Dairy by Category: % Volume Growth 2020-2025

Table 72 - Sales of Other Dairy by Category: % Value Growth 2020-2025

Table 73 - Sales of Cream by Type: % Value 2020-2025

Table 74 - NBO Company Shares of Other Dairy: % Value 2021-2025

Table 75 - LBN Brand Shares of Other Dairy: % Value 2022-2025

Table 76 - Distribution of Other Dairy by Format: % Value 2020-2025

Table 77 - Forecast Sales of Other Dairy by Category: Volume 2025-2030

Table 78 - Forecast Sales of Other Dairy by Category: Value 2025-2030

Table 79 - Forecast Sales of Other Dairy by Category: % Volume Growth 2025-2030

Table 80 - Forecast Sales of Other Dairy by Category: % Value Growth 2025-2030

About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/dairy-products-and-alternatives-in-pakistan/report.