



Euromonitor
International

Where Consumers Shop for Dairy Products and Alternatives

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Key findings

Price sensitivity and market volatility reshaped shopper habits

STATE OF THE INDUSTRY

Pricing is driving value growth, offsetting weakness in volume within the dairy industry

Functional fermented dairy gains momentum across key global markets

Cheese gains ground, while baby food faces headwinds

Latin America and MEA see rapid growth in the dairy industry, while APAC leads sales

Retail e-commerce, discounters, warehouse clubs and convenience stores lead growth

OFFLINE RETAIL

Dominance of supermarkets and hypermarkets challenged by smaller format stores

Global channel movement is hugely affected by APAC, which shows unique trends

Health and beauty specialists retains relevance only for baby food in certain regions

Affordability has shaped the evolution of grocery channels for dairy

Discounters earned USD20.6 billion more in 2025 than in 2020

Discounters in the Philippines emerged as a key channel

RETAIL E-COMMERCE

Brands must solidify their presence through retail e-commerce while growth is strong

Robust Q4 sales indicate (over-)reliance on festive occasions

Retail e-commerce offers new growth opportunities and improved brand footprint

Walmart remains the leading e-commerce retailer for the largest dairy market

Leerdammer chose e-commerce as a core channel for its spreadable cheese debut

CONCLUSION

Evolution of distribution within dairy products and alternatives

How to win

APPENDIX

Euromonitor Passport E-Commerce: Coverage and methodology

About Euromonitor International

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- **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.
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For more information on this report, further enquiries can be directed via this link www.euromonitor.com/where-consumers-shop-for-dairy-products-and-alternatives/report.