

Global Demineralized Whey Powder Market 2026

Market size, segmentation, competitive landscape and outlook

2021-2031

Moving forward, together



Every one of us has, at some point, heard the line from *Alice in Wonderland*: “It takes all the running you can do, to keep in the same place. If you want to get somewhere else, you must run at least twice as fast.” Cliché as the quote has become, our world is changing at extraordinary speed. And yet, to my mind, it matters not only to run fast, but — more importantly — to know where you are running.

We see ourselves as the navigator, ready at the right moment to point out the correct course. By providing current, timely information for the decisions that matter, we aim to protect our clients from missteps and to help them find new opportunities.

It matters to us that you are satisfied with the work we have done. If you have any questions about this report, we will be glad to answer them.

ANDREY SHEVCHENKO, Managing Partner

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Market at a glance

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Indicator	Value
Market size (2025)	USD 1.1 bn
Forecast (2031)	USD 1.7 bn
CAGR (2021-2031)	6.8%
Study period	2021-2031
Largest region	Europe · 38%
Fastest-growing region	Asia-Pacific · 8.5%
Market concentration	Moderate
Licence	Individual / Company

The global demineralized whey powder market reached USD XXX billion in 2025 and is forecast to attain USD XXX billion by 2031, expanding at a XX% CAGR. Demand is anchored by infant and follow-on formula, where controlled mineral content, consistent lactose-protein composition and stringent microbiological specifications make D70 and D90 grades critical formulation inputs. Europe remains the largest production and consumption region, while Asia-Pacific is the fastest-growing market as Chinese and Southeast Asian manufacturers localize formula supply chains. Capacity investment is increasingly concentrated in electrodialysis, advanced membrane separation, low-heat processing and vertically integrated cheese-whey networks.

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Executive summary

The global demineralized whey powder market reached USD XXX billion in 2025 and is forecast to attain USD XXX billion by 2031, expanding at a XX% CAGR. Demand is anchored by infant and follow-on formula, where controlled mineral content, consistent lactose-protein composition and stringent microbiological specifications make D70 and D90 grades critical formulation inputs. Europe remains the largest production and consumption region, while Asia-Pacific is the fastest-growing market as Chinese and Southeast Asian manufacturers localize formula supply chains. Capacity investment is increasingly concentrated in electrodialysis, advanced membrane separation, low-heat processing and vertically integrated cheese-whey networks.

Indicator	Value
Market size 2025	XXX
Forecast 2031	XXX
CAGR	XXX
Largest region	XXX
Fastest region	XXX

Key findings

- Global market value reached USD XXX billion in 2025 and will rise to USD XXX billion by 2031.
- Commercial volume totaled XXX metric tonnes in 2025 and is forecast to reach XXX metric tonnes in 2031.
- D90 represented XX% of 2025 revenue, supported by its central role in infant and specialized nutrition formulations.
- Infant and follow-on formula generated XX% of market value in 2025.
- Europe held XX% of global revenue in 2025, reflecting its integrated cheese, whey-processing and export infrastructure.
- Asia-Pacific will expand at an XX% CAGR through 2031, the fastest rate among the five regions.
- Eurostat recorded XXX tonnes of liquid-whey-equivalent output from EU dairies in 2024, providing the industry's deepest regional feedstock pool.
- USDA NASS recorded XXX pounds of US dry whey production in 2024.

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Market size and forecast

Market value by year, USD bn

Indicator	2026	2027	2028	2029	2030	2031	CAGR
Market value, USD bn	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Market volume	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Production	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Imports	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Exports	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Apparent consumption	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

Year-over-year value change

Indicator	2027	2028	2029	2030	2031	CAGR
Market value	X%	X%	X%	X%	X%	X%
Production	X%	X%	X%	X%	X%	X%
Imports	X%	X%	X%	X%	X%	X%
Exports	X%	X%	X%	X%	X%	X%

Source: XXX

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Global Demineralized Whey Powder Market Trends and Growth Drivers

Demineralized whey powder sits at the intersection of cheese economics, membrane-processing technology and tightly regulated nutrition. Its commercial value rises with the degree of mineral removal, the consistency of the remaining lactose-protein matrix and the supplier's ability to deliver infant-grade microbiological performance across repeated batches.

The demand structure is unusually concentrated in infant and follow-on formula, making demographics important but not determinative. Premiumization, specialized formulas, domestic supply security and stricter formulation control are raising ingredient value even where birth numbers are falling.

Supply growth requires more than installing separation equipment. Producers need dependable sweet-whey streams, dedicated hygiene zones, drying capacity, customer qualification and destination-market documentation, which gives integrated European dairy groups and technically advanced Asian entrants a durable competitive advantage.

Growth drivers

Infant-formula mineral control

Infant-formula manufacturers use deeply demineralized whey to reproduce the required whey-to-casein balance without exceeding sodium, potassium, chloride and ash constraints. D90 benefits most because its low and consistent mineral load gives formulators greater freedom when adding prescribed micronutrients and functional ingredients.

Asian supply-chain localization

China and Southeast Asian markets are investing in domestic dairy-ingredient processing to reduce import dependence and shorten qualification and delivery cycles. Local D90 capacity also improves inventory resilience for formula manufacturers serving regulated national markets.

Specialized-nutrition expansion

Clinical nutrition, maternal nutrition and age-tailored nutritional powders are broadening demand beyond conventional infant formula. These applications pay premiums for controlled mineral composition, digestibility and batch consistency, increasing the value captured per tonne.

Whey valorization investment

Cheese processors are converting whey from a disposal or low-value feed stream into nutrition-grade ingredients. Integrated demineralization and drying assets improve the economics of cheese plants while securing traceable raw material for ingredient divisions.

Separation-process efficiency

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Electrodialysis, nanofiltration and ion-exchange improvements reduce mineral variability and raise plant recovery rates. Hybrid systems also lower chemical consumption and wastewater load, making deeper demineralization economically viable across a wider range of facilities.

Premium tailored grades

Organic, dry-blend, low-heat and customer-specific mineral profiles command higher prices than standard demineralized powder. Suppliers with application laboratories and validated infant-grade production lines can convert technical differentiation into multiyear contracts.

Restraints

Birth-rate contraction

Falling births in China, Europe, Japan and South Korea limit volume growth in the market's largest application. Suppliers must offset the demographic drag through premium formulations, regional expansion and greater exposure to medical and adult nutrition.

Capital-intensive D90 processing

Deep demineralization requires costly separation, concentration, drying, water-treatment and hygienic-design infrastructure. Energy consumption and membrane or resin replacement raise the break-even utilization rate and favor large integrated dairy processors.

Dairy feedstock volatility

Availability and pricing depend on milk intake, cheese production and competition from whey protein and lactose streams. Rapid changes in milk and commodity-dairy prices compress margins where processors lack internal whey supply or contractual pass-through mechanisms.

Qualification bottlenecks

Infant-nutrition customers require extensive audits, microbiological validation, stability testing and regulatory documentation before approving a new plant or grade. Qualification can delay revenue from new capacity and makes customer conversion slower than in mainstream food ingredients.

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Demineralized Whey Powder Driver and Restraint Impact on the Forecast

Drivers — impact on forecast

Driver	Impact on CAGR	Geography	Horizon
Infant-formula mineral control	XXX	XXX	XXX
Asian supply-chain localization	XXX	XXX	XXX
Specialized-nutrition expansion	XXX	XXX	XXX
Whey valorization investment	XXX	XXX	XXX
Separation-process efficiency	XXX	XXX	XXX
Premium tailored grades	XXX	XXX	XXX

Source: XXX

Restraints — impact on forecast

Restraint	Impact on CAGR	Geography	Horizon
Birth-rate contraction	XXX	XXX	XXX
Capital-intensive D90 processing	XXX	XXX	XXX
Dairy feedstock volatility	XXX	XXX	XXX
Qualification bottlenecks	XXX	XXX	XXX

Source: XXX

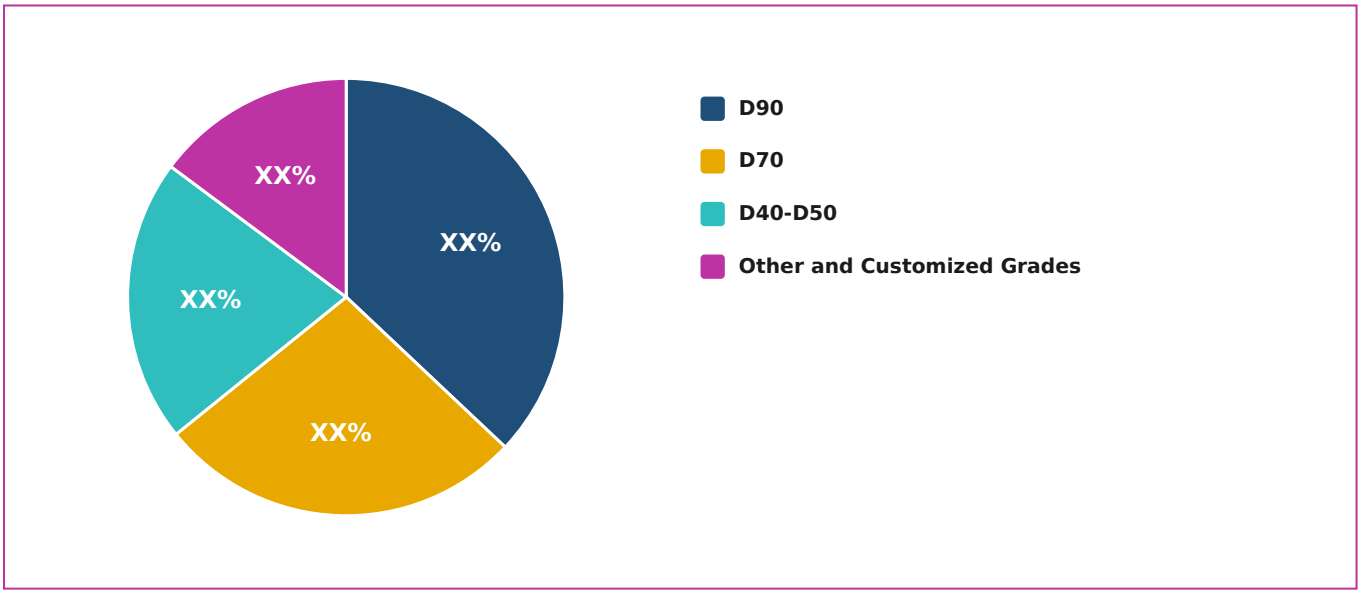
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Demineralized Whey Powder Market Segmentation Analysis

By Demineralization Level

D90 commands the largest revenue share because low ash and controlled electrolytes are essential in premium infant and medical-nutrition formulations. D70 serves mainstream formula and specialized food applications, while D40 and D50 compete more directly with conventional whey solids in bakery, confectionery and dairy. Growth is shifting toward D90 as manufacturers seek greater formulation flexibility and tighter mineral tolerances.

Value share by demineralization Level, 2025



Source: XXX

Value by demineralization Level, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
D90	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
D70	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
D40-D50	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Other and Customized Grades	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

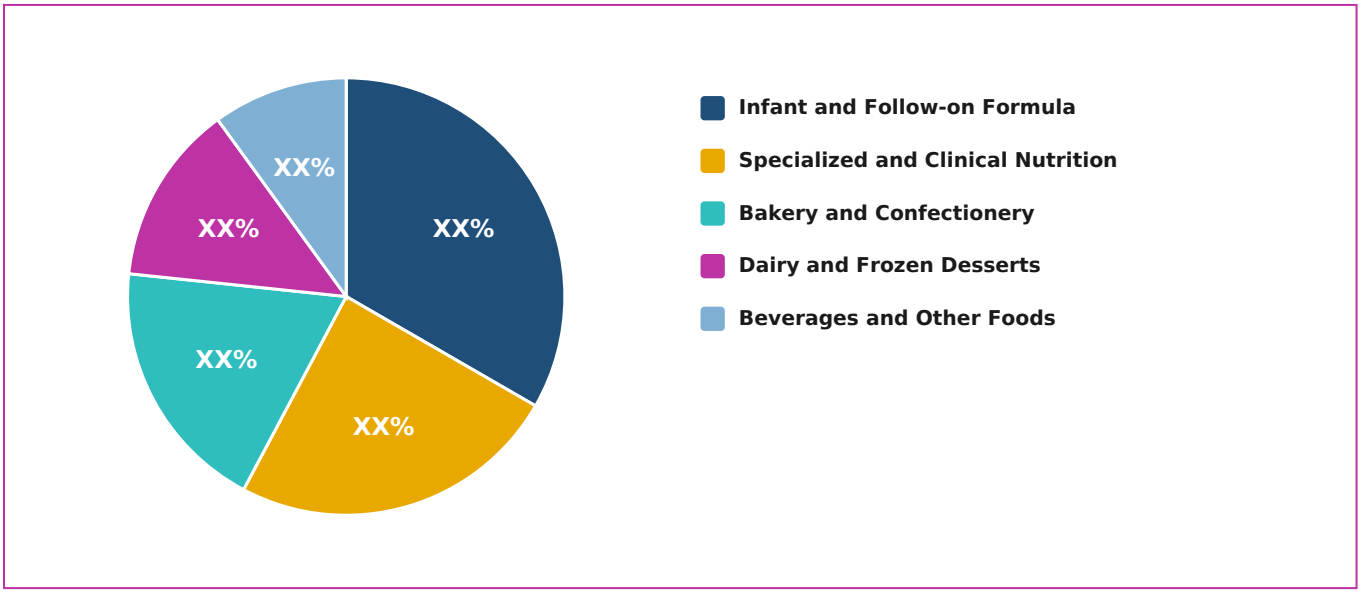
By Application

Infant and follow-on formula remains the defining application because demineralized whey supplies lactose and dairy protein while allowing precise electrolyte control. Specialized and clinical nutrition is the fastest-growing application as manufacturers develop maternal, elderly and condition-specific products. Bakery, confectionery and dairy applications favor less deeply demineralized grades where browning, sweetness,

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solids and cost functionality are more important.

Value share by application, 2025



Source: XXX

Value by application, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Infant and Follow-on Formula	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Specialized and Clinical Nutrition	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Bakery and Confectionery	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Dairy and Frozen Desserts	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Beverages and Other Foods	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Process

Electrodialysis leads because it provides selective ion removal and repeatable deep-demineralization performance at industrial scale. Ion exchange remains important for polishing and high-purity output, while nanofiltration delivers partial mineral reduction with attractive water and energy economics. Combined systems grow fastest as processors optimize yield, effluent load and final mineral specifications.

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Value by process, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Electrodialysis	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Ion Exchange	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Nanofiltration	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Combined and Other Processes	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Form

Spray-dried powder dominates international trade and formula manufacturing because it can be stored, shipped and dosed through established dry-ingredient systems. Concentrated liquid grades remain a localized business serving co-located or nearby wet-process plants. Liquid demand grows faster where supply chains can avoid a drying and later reconstitution step.

Value by form, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Powder	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Concentrated Liquid	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Customer Type

Large infant-nutrition manufacturers secure substantial volumes under audited, specification-led contracts and often qualify multiple plants for continuity. Food and beverage processors purchase broader grade portfolios with greater price sensitivity. Ingredient blenders and distributors remain important in smaller markets, while medical-nutrition specialists generate the fastest growth through customized formulations.

Value by customer Type, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Infant-Nutrition Manufacturers	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Food and Beverage Processors	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Medical and Specialized-Nutrition Companies	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Ingredient Blenders and Distributors	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

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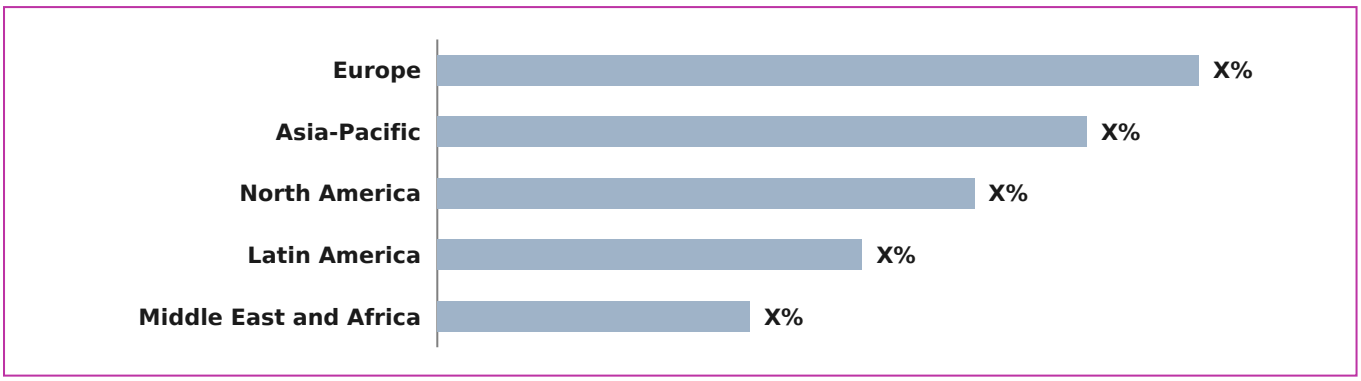
Demineralized Whey Powder Market Regional Analysis and Country Outlook

Europe accounted for XX% of global value in 2025, led by France, the Netherlands, Germany, Denmark and Ireland. The region combines a large cheese-whey pool with mature electrodialysis and spray-drying infrastructure, established infant-nutrition quality systems and efficient access to export ports. Eurostat's XXX tonnes of liquid-whey-equivalent dairy output in 2024 illustrates the feedstock depth supporting European ingredient production.

Asia-Pacific represented XX% of 2025 demand and will grow at XX% annually through 2031. China is the decisive market: declining births constrain mass-market formula volumes, but premiumization, domestic ingredient security and the commissioning of Yili's integrated D90 electrodialysis line support rapid local value growth. Indonesia, Vietnam, India and the Philippines add demand through expanding formula penetration, urban incomes and domestic blending capacity.

North America holds an XX% share and benefits from abundant cheese whey, sophisticated separation technology and growing specialized-nutrition demand. Latin America and the Middle East and Africa together account for XX%, with Brazil, Mexico, Türkiye, Saudi Arabia and the United Arab Emirates developing as regional blending or distribution hubs. These markets remain more import-dependent and therefore offer attractive routes for European, US and New Zealand suppliers.

Growth rate by region, 2025-2031



Source: XXX

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Market value by region, USD bn

Region	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Europe	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Asia-Pacific	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
North America	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Latin America	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Middle East and Africa	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

Market value by leading country, USD bn

Country	2025	2031	Share 2025	CAGR
United States	XXX	XXX	XXX	XXX
Germany	XXX	XXX	XXX	XXX
United Kingdom	XXX	XXX	XXX	XXX
Belgium	XXX	XXX	XXX	XXX
Netherlands	XXX	XXX	XXX	XXX
Japan	XXX	XXX	XXX	XXX
China	XXX	XXX	XXX	XXX
Mexico	XXX	XXX	XXX	XXX

Source: XXX

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Demineralized Whey Powder Market Competitive Landscape and Company Share

The market is moderately concentrated: the five largest suppliers captured XX% of 2025 revenue. FrieslandCampina Ingredients, Lactalis Ingredients, Arla Foods Ingredients, Valio and DMK Group lead through integrated whey access, infant-nutrition approvals, application support and global logistics. A second tier of regional dairy processors competes in D40, D50 and selected D70 or D90 contracts.

Competition centers on mineral consistency, microbiological performance, heat treatment, solubility, traceability and security of supply rather than price alone. Dry-blend suitability and Cronobacter control are critical in infant applications, while co-located liquid grades create transport and carbon advantages for wet-process customers. Long validation cycles and customer audits create meaningful switching costs.

Recent consolidation is strengthening control over European whey pools. FrieslandCampina's merger with Milcobel and Arla's proposed combination with DMK increase scale across cheese and ingredients, while Arla's acquisition of Volac Whey Nutrition and FrieslandCampina's Wisconsin Whey Protein transaction expand their broader whey platforms. Capital deployment is moving toward high-value proteins, advanced fractionation and flexible lines capable of serving early-life, medical and performance nutrition.

Leading companies

Company	HQ	Est. revenue 2025	Market share 2025	YoY
FrieslandCampina Ingredients	XXX	XXX	XXX	XXX
Lactalis Ingredients	XXX	XXX	XXX	XXX
Arla Foods Ingredients	XXX	XXX	XXX	XXX
Valio	XXX	XXX	XXX	XXX
DMK Group	XXX	XXX	XXX	XXX
Fonterra Co-operative Group	XXX	XXX	XXX	XXX
Euroserum	XXX	XXX	XXX	XXX
Armor Proteines	XXX	XXX	XXX	XXX
Carbery Group	XXX	XXX	XXX	XXX
Inner Mongolia Yili Industrial Group	XXX	XXX	XXX	XXX

Source: XXX

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Demineralized Whey Powder Market Forecast and Commercial Opportunities

The market will add USD XXX million in annual revenue between 2025 and 2031. D90 will capture XX% of that incremental value as customers prioritize low-ash grades for premium infant, maternal and medical nutrition. Volume growth will run below value growth because product mix, qualification premiums and energy-intensive processing sustain a positive price contribution.

The central forecast assumes stable global cheese output, gradual Asian localization and continued premiumization despite weak birth demographics in mature markets. The upside scenario is driven by faster adoption of domestically produced D90 in China and broader clinical-nutrition demand; the downside scenario reflects prolonged formula destocking, lower births and aggressive new-capacity pricing.

Winning suppliers will pair secured whey streams with flexible demineralization, infant-grade hygiene, regional technical service and measurable reductions in energy, water and carbon intensity. Producers limited to commodity D40 and D50 grades face the greatest margin pressure, while differentiated D90, organic and tailored-mineral portfolios will retain contract and pricing power.

Opportunities

- Domestic D90 production in China and other import-dependent Asian markets
- Low-carbon liquid D90 for co-located wet-process formula plants
- Customized mineral profiles for medical and adult nutrition
- Organic and fully traceable European-origin ingredients
- Hybrid membrane systems with lower water and chemical consumption
- Long-term supply partnerships with regional infant-formula manufacturers

> This preview shows the form and depth of the report. The full report contains every figure, segment- and country-level detail and full company profiles. On purchase all figures are finalised and verified, and the report is delivered within 24–72 hours.

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