



Global Organic Infant Formula Market

Market size, segmentation, competitive landscape and outlook

2021-2031

September 2026

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 7.4 bn
Forecast (2031)	USD 12.2 bn
CAGR (2021-2031)	8.6%
Study period	2021-2031
Largest region	Asia-Pacific · 39.4%
Fastest-growing region	Asia-Pacific · 10.1%
Market concentration	Moderate
Licence	Individual / Company

The global organic infant formula market reached USD XXX billion in 2025 and will expand to USD XXX billion by 2031, advancing at an XX% CAGR. Asia-Pacific holds XX% of global revenue, supported by premium-formula demand in China, rising retail penetration across Southeast Asia and growing preference for certified milk provenance. Cow-milk formula remains the category anchor, while goat-milk products, direct-to-consumer subscriptions and whole-milk formulations are reshaping the premium tier. Tighter ingredient traceability, microbiological controls and formula-registration requirements are raising entry barriers and strengthening the position of manufacturers with vertically controlled organic supply chains.

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Executive summary

The global organic infant formula market reached USD XXX billion in 2025 and will expand to USD XXX billion by 2031, advancing at an XX% CAGR. Asia-Pacific holds XX% of global revenue, supported by premium-formula demand in China, rising retail penetration across Southeast Asia and growing preference for certified milk provenance. Cow-milk formula remains the category anchor, while goat-milk products, direct-to-consumer subscriptions and whole-milk formulations are reshaping the premium tier. Tighter ingredient traceability, microbiological controls and formula-registration requirements are raising entry barriers and strengthening the position of manufacturers with vertically controlled organic supply chains.

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

Key findings

- Global organic infant formula revenue reached USD XXX billion in 2025 and will reach USD XXX billion by 2031.
- Asia-Pacific generated XX% of 2025 market value and will grow at a XX% CAGR through 2031.
- Cow-milk-based products represented XX% of 2025 revenue, while goat-milk formula will grow at a XX% CAGR.
- Powdered formula accounted for XX% of market value because of its shelf life, freight efficiency and broad stage coverage.
- Online retail captured XX% of global sales in 2025 and will advance at a XX% CAGR as subscriptions and cross-border storefronts scale.
- The United States registered XXX births in 2024, according to the National Center for Health Statistics.
- The European Union recorded XXX births in 2023, a XX% decline from 2022, according to Eurostat.
- China's State Administration for Market Regulation had approved XXX infant-formula recipes from 134 companies under the country's new national standards by the end of 2023.

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

Global Organic Infant Formula Market Trends and Growth Drivers

Organic infant formula sits at the intersection of tightly regulated nutrition, premium dairy sourcing and unusually risk-sensitive consumer behavior. Caregivers purchase nutritional adequacy first, but within that regulated baseline they increasingly discriminate on certification, milk origin, ingredient simplicity, functional components and brand transparency. This creates a market in which modest volume growth can generate stronger value expansion through premium mix.

The supply side is defined by high fixed costs and a narrow margin for quality failure. Certified milk segregation, validated nutrient premixes, controlled drying environments, clinical evidence and country-specific registrations favor manufacturers with deep technical and regulatory infrastructure. Specialist brands remain effective challengers when they secure reliable production and translate differentiated recipes into simple, credible consumer propositions.

Demographics create the principal structural counterweight. Birth cohorts are contracting in several high-value countries, directing competitive energy toward share capture, premium stage progression and geographic expansion. Digital subscriptions, goat-milk formulations and entry into US and Asian retail networks provide the clearest routes to growth.

Growth drivers

Certified ingredient provenance

Parents purchasing at the premium end increasingly evaluate farm origin, pesticide restrictions, antibiotic policies and GMO exclusions alongside basic nutritional adequacy. Recognized organic seals convert these attributes into a verifiable proposition and support sustained price premiums in supermarkets, pharmacies and digital channels.

Goat milk and whole-milk premiumization

Goat-milk and whole-milk recipes are widening the organic category beyond conventional skim-milk formulations. Their differentiated fat composition, provenance story and premium European brand positioning increase average selling prices and attract parents seeking alternatives within the standard formula aisle.

Functional formulation upgrades

HMOs, MFGM, DHA, ARA, prebiotic blends and optimized protein systems are becoming central to premium portfolio renewal. Suppliers able to combine permitted functional ingredients with organic certification create clearer product ladders and defend margins against private-label entry.

Digital subscription adoption

Subscription ordering reduces stockout anxiety and gives emerging brands a direct relationship with caregivers during a predictable consumption window. Recurring delivery also improves retention, demand forecasting and the economics of educational content, customer service and sampling.

Urban premium demand in Asia

Higher disposable incomes and strong attention to food safety are sustaining premium formula expenditure among urban households across China and Southeast Asia. Imported and domestically produced organic lines benefit where certification, country of origin and controlled dairy sourcing are clearly communicated.

Modern retail distribution expansion

International organic brands are moving from specialist import channels into national supermarkets, pharmacies and mass merchants. The resulting improvement in availability reduces consumer switching friction and makes the category accessible beyond affluent metropolitan districts.

Restraints

Contracting birth cohorts

Lower birth volumes reduce the addressable number of new formula users in Europe and several major East Asian markets. Premiumization offsets part of the demographic drag, but suppliers must capture share or expand geographically to sustain volume growth.

Organic input cost inflation

Certified milk, lactose, whey, specialty oils and segregated processing command structural premiums and face a narrower approved supplier base. Cost volatility is especially difficult for smaller brands that lack long-term farm contracts or their own drying capacity.

Registration and compliance intensity

Formula notification, clinical growth evidence, nutrient testing, label review and plant inspection extend launch timelines and increase fixed costs. China's recipe-registration framework and the United States' premarket requirements make rapid cross-border portfolio replication impractical.

Microbiological and recall risk

Powdered formula is subject to intensified scrutiny of spore-forming organisms, environmental controls and ingredient-level traceability. A major recall can eliminate inventory, suspend production and shift demand rapidly toward established suppliers with redundant capacity.

Marketing and promotion restrictions

Rules limiting infant-formula advertising, idealizing imagery, discounts and health claims constrain conventional customer-acquisition tools. Brands must rely more heavily on reputation, compliant educational content, follow-on ranges and retail visibility.

Organic Infant Formula Driver and Restraint Impact on the Forecast

Drivers — impact on forecast

Driver	Impact on CAGR	Geography	Horizon
Certified ingredient provenance	XXX	XXX	XXX
Goat milk and whole-milk premiumization	XXX	XXX	XXX
Functional formulation upgrades	XXX	XXX	XXX
Digital subscription adoption	XXX	XXX	XXX
Urban premium demand in Asia	XXX	XXX	XXX
Modern retail distribution expansion	XXX	XXX	XXX

Source: XXX

Restraints — impact on forecast

Restraint	Impact on CAGR	Geography	Horizon
Contracting birth cohorts	XXX	XXX	XXX
Organic input cost inflation	XXX	XXX	XXX
Registration and compliance intensity	XXX	XXX	XXX
Microbiological and recall risk	XXX	XXX	XXX
Marketing and promotion restrictions	XXX	XXX	XXX

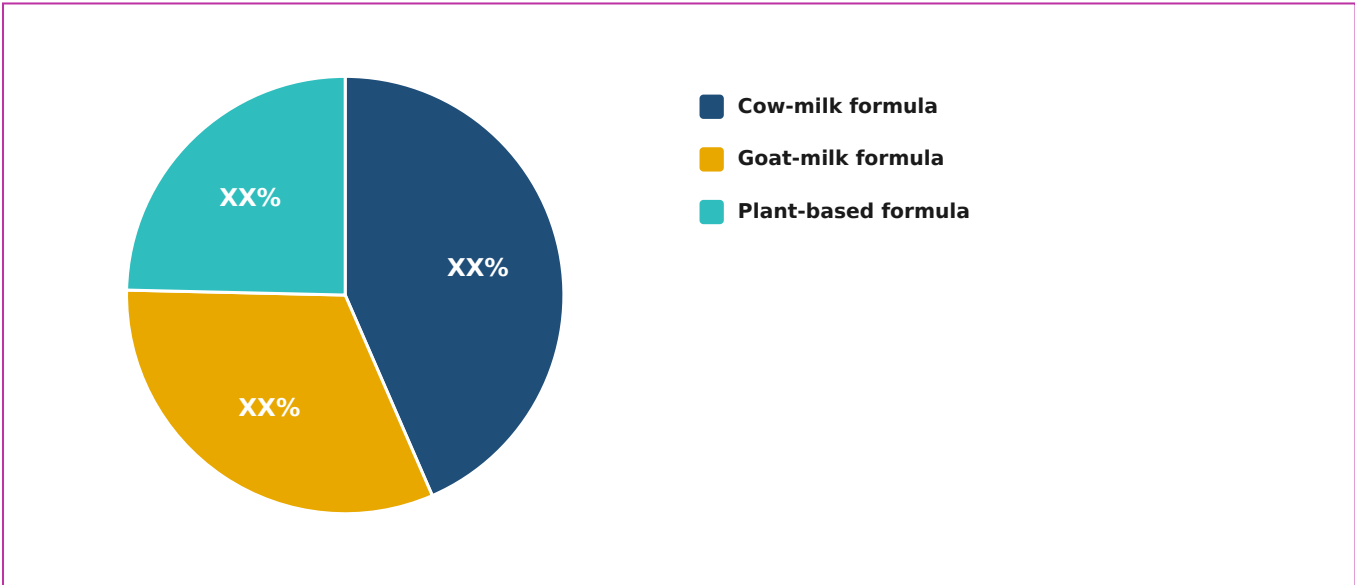
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Organic Infant Formula Market Segmentation Analysis

By Product Type

Cow-milk formula benefits from the broadest certified dairy base, established clinical familiarity and extensive stage coverage. Goat-milk products are expanding through European export brands and premium positioning around milk origin and protein characteristics. Plant-based products remain constrained by formulation complexity and the limited number of products meeting both organic and infant-nutrition requirements.

Value share by product Type, 2025



Source: XXX

Value by product Type, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Cow-milk formula	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Goat-milk formula	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Plant-based formula	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Age Stage

Stage 1 formula leads because it covers the earliest and most intensive feeding period and carries the greatest caregiver attention. Stage 2 retains a large share as brands encourage continuity through follow-on products. Stage 3 grows fastest where young-child formula is an established category and where manufacturers can communicate within less restrictive promotional frameworks.

Value by age Stage, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Stage 1: 0-6 months	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Stage 2: 6-12 months	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Stage 3: 12-36 months	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Form

Powder dominates because it offers favorable shelf life, transport economics and manufacturing scalability. Ready-to-feed formula commands higher unit pricing and benefits from convenience, controlled preparation and hospital exposure, particularly in North America. Liquid concentrate remains a stable niche where established brands and retail infrastructure support the format.

Value by form, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Powder	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Liquid concentrate	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Ready-to-feed liquid	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Packaging

Metal cans remain the preferred pack for powder because they provide strong moisture and oxygen barriers, tamper evidence and familiar scoop storage. Composite cartons compete on material efficiency and rectangular logistics, while plastic tubs are concentrated among established mass-market platforms. Sachets and pouches grow fastest through travel, sampling and portion-controlled applications.

Value by packaging, USD bn

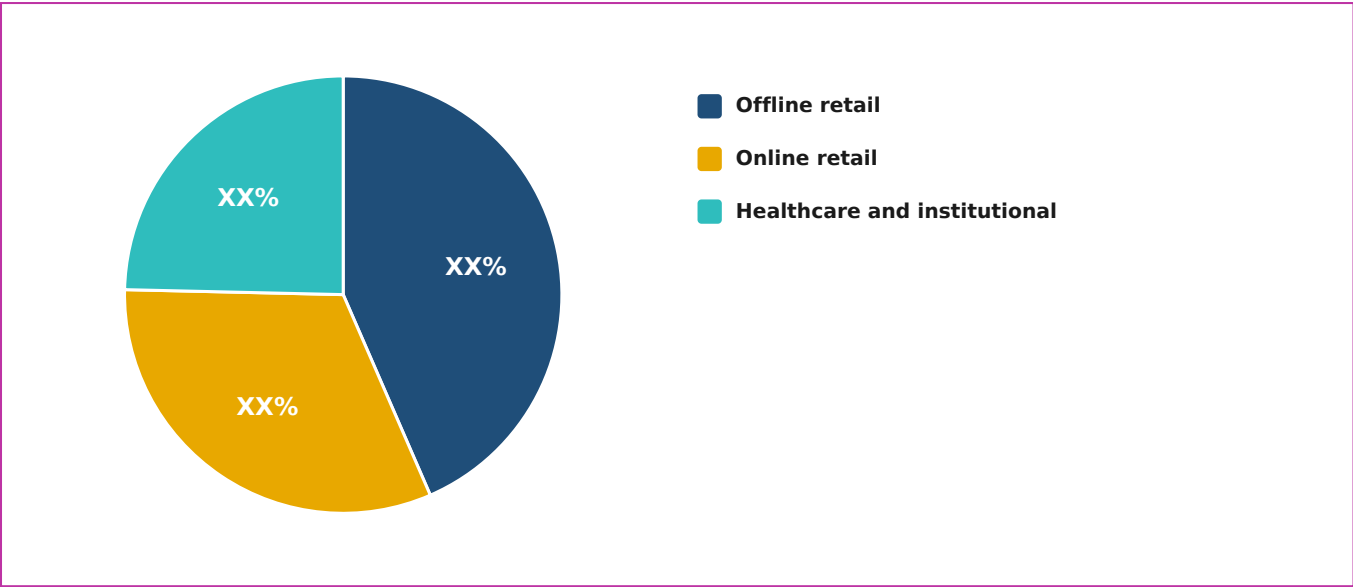
Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Metal cans	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Composite cartons	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Plastic tubs	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Sachets and pouches	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Distribution Channel

Supermarkets, pharmacies and specialist baby stores retain leadership because immediate availability and physical shelf presence are critical to caregivers. Online retail is expanding rapidly through scheduled replenishment, brand-owned subscriptions, marketplace assortment and cross-border access. Healthcare-supported channels remain important for initial brand exposure and publicly funded purchases but are tightly regulated.

Value share by distribution Channel, 2025



Source: XXX

Value by distribution Channel, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Offline retail	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Online retail	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Healthcare and institutional	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

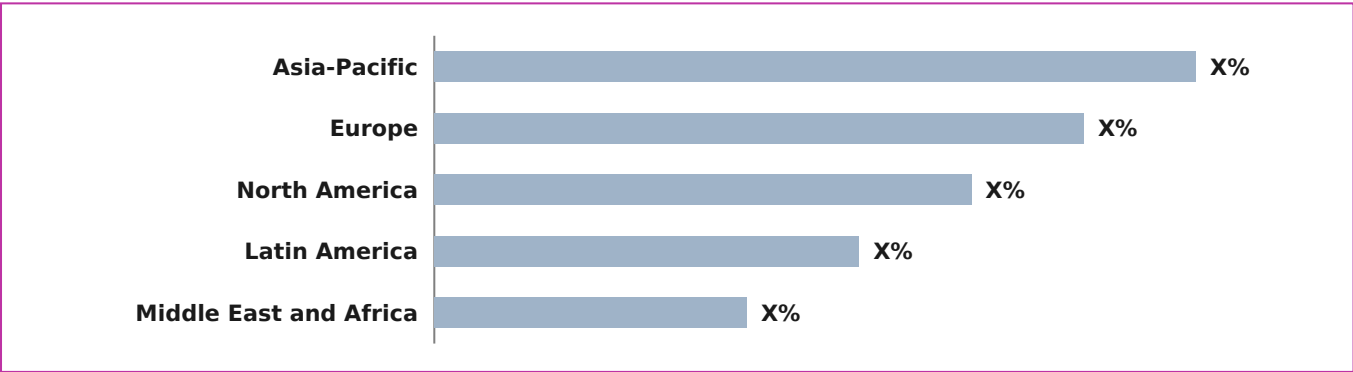
Organic Infant Formula Market Regional Analysis and Country Outlook

Asia-Pacific generated USD XXX billion in 2025, equal to XX% of global market value, and will remain the largest and fastest-growing region through 2031. China anchors regional premium demand through large mother-and-baby retail networks, rigorous formula registration and continued consumer focus on milk origin and food safety. Australia and New Zealand function as both attractive domestic markets and important organic dairy and finished-formula export platforms, while Southeast Asian growth is being led by modern retail, digital marketplaces and expanding upper-middle-income households.

Europe accounted for XX% of 2025 revenue and remains the category's deepest production and certification ecosystem. Germany, France, the Netherlands, Switzerland, Austria and the United Kingdom host major brands, organic farms, ingredient suppliers and export-oriented manufacturing facilities. Low birth rates limit volume expansion, but organic penetration, goat-milk innovation and exports to North America, the Middle East and Asia sustain value growth.

North America represented XX% of global revenue and will expand at an XX% CAGR. The United States is being reshaped by wider retail access for European-style formulas, direct-to-consumer subscriptions and federal initiatives addressing safety, nutrient standards and supply resilience. Latin America and the Middle East and Africa remain smaller revenue pools, with Brazil, Mexico, the Gulf states and selected urban African markets offering the strongest prospects for pharmacy-led and imported premium products.

Growth rate by region, 2025-2031



Source: XXX

Market value by region, USD bn

Region	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Asia-Pacific	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Europe	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

Organic Infant Formula Market Competitive Landscape and Company Share

The global organic infant formula market is moderately concentrated: multinational nutrition groups control broad regulatory, manufacturing and retail capabilities, while specialist organic brands hold influential positions in premium niches. Nestlé, Danone, HiPP, Holle, Abbott, Reckitt and Perrigo compete alongside focused challengers such as Kendal Nutricare, Bobbie and Bubs Australia. Bellamy's Organic gives China Mengniu a recognized organic platform spanning Australia and China.

Scale advantages arise from access to certified milk pools, validated ingredient suppliers, spray-drying capacity, clinical and regulatory teams, and the ability to absorb recalls or temporary plant outages. Specialist brands counter these advantages with whole-milk recipes, goat-milk offerings, direct subscriptions, transparent sourcing and faster consumer communication. Retail expansion by Kendamil and Bobbie demonstrates that challenger brands can move from digital or specialist channels into national mass retail once supply and regulatory clearance are secured.

Investment priorities through 2031 will center on manufacturing redundancy, raw-material traceability, spore-forming organism controls, recyclable packaging and premium formulation platforms. Portfolio acquisitions remain attractive because regulatory dossiers and trusted brands are difficult to reproduce, but quality-system integration and supplier oversight will receive greater scrutiny following the ByHeart and Nara Organics recalls.

Leading companies

Company	HQ	Est. revenue 2025	Market share 2025	YoY
Nestlé S.A.	XXX	XXX	XXX	XXX
Danone S.A.	XXX	XXX	XXX	XXX
HiPP GmbH & Co. Vertrieb KG	XXX	XXX	XXX	XXX
Holle baby food AG	XXX	XXX	XXX	XXX
Abbott Laboratories	XXX	XXX	XXX	XXX
Reckitt Benckiser Group plc	XXX	XXX	XXX	XXX
Perrigo Company plc	XXX	XXX	XXX	XXX
Kendal Nutricare Ltd.	XXX	XXX	XXX	XXX
Bellamy's Organic	XXX	XXX	XXX	XXX
Bubs Australia Ltd.	XXX	XXX	XXX	XXX
Bobbie Baby, Inc.	XXX	XXX	XXX	XXX
Arla Foods amba	XXX	XXX	XXX	XXX

Source: XXX

Organic Infant Formula Market Forecast and Opportunities

The market will add USD XXX billion in annual revenue between 2025 and 2031. Asia-Pacific will generate the largest absolute increment, while goat-milk products and online retail will outgrow their parent categories. Powder will remain dominant, although ready-to-feed formats will gain selectively in North America through convenience, hospital exposure and sterile packaging.

The central forecast assumes stable organic dairy availability, gradual easing of commodity-cost pressure and continued premium demand despite declining birth rates in mature economies. Stronger-than-expected Chinese premium consumption and faster supermarket adoption in the United States would lift the 2031 outcome, while persistent birth contraction, major supply interruptions or aggressive affordability regulation would temper growth.

Winning suppliers will combine credible certification with product attributes that caregivers can readily understand: controlled farm origin, whole-milk or goat-milk positioning, transparent ingredient lists and consistent availability. Companies that operate multi-plant supply networks and connect ingredient lots to finished-product traceability will earn stronger retailer confidence and lower the commercial impact of localized disruptions.

Opportunities

- Certified-organic goat-milk formula
- Whole-milk formulas containing naturally occurring milk-fat-globule membrane
- Direct-to-consumer replenishment subscriptions
- Locally registered premium formulas for China and Southeast Asia
- Low-carbon organic dairy sourcing and recyclable metal packaging
- Traceability platforms connecting finished cans to farms and ingredient batches
- Geographically redundant spray-drying and blending capacity

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.