

BRIEFING NOTE

Analogue Paneer in India

A Food-Systems Threat to Health Equity

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₹731 bn India paneer market, 2025	35% of tested Maharashtra paneer samples were non-compliant	3 states (Chhattisgarh, Maharashtra and Gujarat) with active bans on analogue paneer
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EXECUTIVE SUMMARY

FSSAI recognizes dairy analogues as products in which non-milk constituents replace some or all milk constituents and explicitly states that such products are **not milk, milk products or composite milk products**. Yet products described as “analogue paneer” can resemble paneer in appearance and texture while having a different composition and nutritional profile. This raises a fundamental consumer-protection question: **if the product is not recognised as a paneer or a milk product, should it retain “paneer” in its name?**

FSSAI’s April 2025 Consultation Paper acknowledges this nomenclature issue and suggests terms such as **“Non-dairy” or “Analogue”** before the dairy term, while noting that the terminology was only suggestive and subject to consultation. The question is whether such qualifiers are sufficient to distinguish between a fundamentally different product or whether a distinct nomenclature would provide clearer information and reduce consumer confusion. This is particularly relevant because analogue products may differ nutritionally from conventional paneer; however, the available FSSAI material does **not** establish that analogue paneer itself causes cardiovascular disease.

The issue is therefore not whether dairy analogues should be available, but **whether consumers can reliably understand what they are buying or being served**. Recent FSSAI advisories and state enforcement actions including Maharashtra’s reported non-compliance findings and subsequent restrictions, alongside actions in Chhattisgarh and Gujarat—show growing regulatory attention. However, publicly reported analogue-specific testing and enforcement data remain uneven across states.

We recommend that the NHRC urge FSSAI and all State Food Safety Commissioners to strengthen **clear, consistent and publicly verifiable consumer disclosure**, including state-wise testing and enforcement reporting and assessment of naming and menu disclosure practices. More fundamentally, FSSAI may consider whether retaining the identity **“paneer”** in the name of a non-dairy analogue adequately protects consumers, or whether a distinct nomenclature is necessary where the use of “paneer” could continue to create confusion.

1. What Is Being Called “Analogue Paneer”—and Why Should It Be Called Paneer at All?

FSSAI defines an “Analogue in the dairy context” as a product in which constituents not derived from milk replace some or all milk constituents, while the final product resembles milk, a milk product or a composite milk product in its sensory or functional characteristics. FSSAI also explicitly states that analogues in the dairy context are not considered milk, milk products or composite milk products.

FSSAI's January 2026 *Food Safety and Standards Digest* describes analogue paneer as being made by blending vegetable oils such as palm oil, vegetable fats such as palm stearin, starches, milk solids (SMP), plant proteins such as soy and pea, stabilisers, emulsifiers and artificial flavours, followed by curdling with common acidulants. It states that the resulting product mimics the look and texture of paneer but has a different nutritional profile.

This nutritional difference is important from a public-health perspective. There is no basis in these FSSAI documents to claim that analogue paneer itself causes cardiovascular disease. However, where formulations contain fats such as palm-derived fats, their cardiovascular implications depend on the actual fatty-acid composition and amount consumed. WHO guidelines recommend limiting saturated fat and replacing it, where possible, with unsaturated fat, because dietary saturated and trans fats are established risk factors for cardiovascular disease. This makes clear disclosure of the composition and nutritional profile particularly important.

The nomenclature problem

The central question is therefore: if FSSAI does not recognise the product as paneer or as a milk product, why should “paneer” remain part of its name? FSSAI's April 2025 Consultation Paper specifically acknowledges the nomenclature issue. It proposes that products served by restaurants and other food establishments using a dairy analogue should be identified by prefixing “Non-dairy” or “Analogue” to the dairy term—for example, “Analogue of Paneer” but expressly states that this terminology is “only suggestive and will be finalized after consultation.”

This leaves a fundamental consumer-protection question: does adding “Analogue” or “Non-dairy” to the word “Paneer” adequately distinguish a fundamentally different product, or does it continue to use the identity of paneer for a product that is not paneer? The issue is not whether consumers should have access to non-dairy or plant-protein foods. The question is “why a product that is not recognised as a dairy product and may have a different nutritional profile needs to retain the name “paneer” at all?”. FSSAI's own consultation provides an opportunity to consider whether such products should instead have a distinct nomenclature that immediately communicates what they are, rather than relying on a qualifier attached to the name of a dairy food.

If it is not paneer, should a product be permitted to use “paneer” in its name at all, or should it have a distinct name, with restrictions considered if the use of the paneer identity cannot adequately prevent consumer confusion?

2. The Scale of the Market

Analogue paneer is, in effect, parasitic upon one of India's largest and fastest-growing food categories. India's paneer market was valued, by one industry estimate, at roughly **₹731 billion in 2025**, and is projected to reach approximately ₹2,150 billion by 2034, expanding at a compound annual rate of roughly 12 per cent (Figure 1). That growth rests atop the world's largest milk producer: India produces about approx 24 per cent of global milk—239 million tonnes in 2023–24—and **single largest agricultural commodity contributing 5% of the national economy**; while supporting more than 80 million rural households and workforce women constitute nearly 70 per cent.

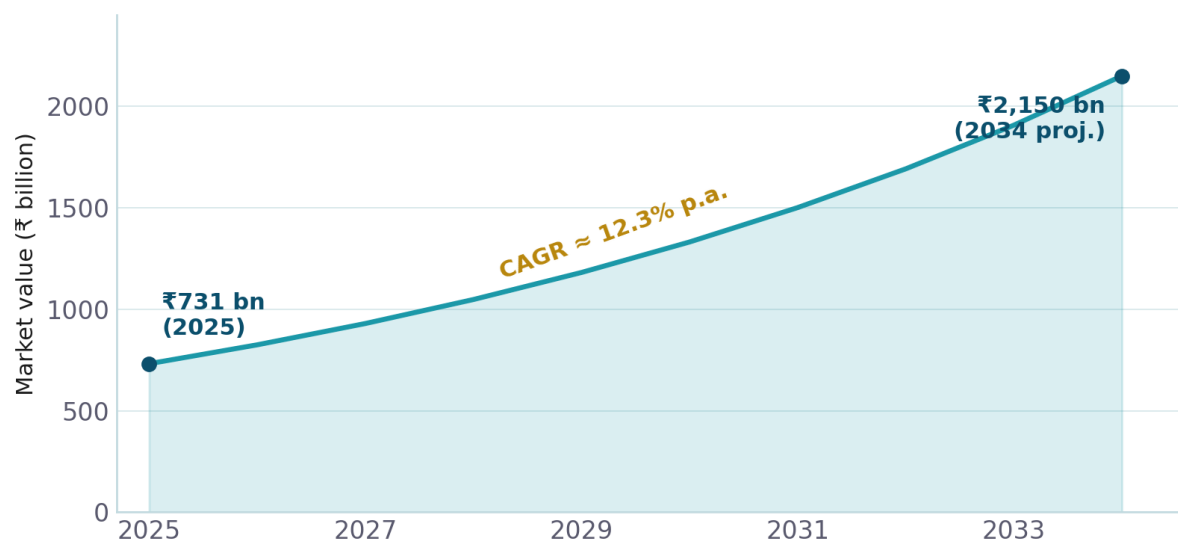


Figure 1. India's paneer market, actual (2025) and projected (2034). The analogue trade rides on, and diverts value from, a rapidly expanding category.

There is, however, **no reliable publicly available, standalone figure for the size of the analogue-paneer trade**, and that absence is itself part of the problem. Analogue products may enter food-service supply chains through channels that are not separately captured in formal market estimates, including unbranded or loosely supplied products. Available enforcement and testing findings provide indications of the problem but are not directly comparable across jurisdictions. In Maharashtra, for example, the state FDA reported that **109 of 308 paneer and dairy-analogue samples tested between April 2025 and March 2026 were non-compliant**, including 79 classified as sub-standard and 30 as unsafe.

Available enforcement data illustrate the broader scale of paneer non-compliance: in Noida and Greater Noida, 83% of tested paneer samples failed to meet quality standards during April 2024–March 2025, with 40% classified as unsafe for consumption. These findings concern paneer quality/adulteration generally and should not be interpreted as evidence that 83% of the samples were dairy analogues.

Reading the numbers with care

The ₹731 billion figure is the *whole* paneer market, not the analogue share; sample-failure percentages describe *tested* samples (often targeted at suspect supply), not the market as a whole. Both point to a large and under-measured problem, but neither should be quoted as “the size of the analogue-paneer industry,” which currently no authoritative source quantifies.

3. Why is there a high supply of these paneers?

3.1 What is FSSAI doing for it?

FSSAI has established a national regulatory framework for dairy analogues, but the available public record suggests that the **operationalisation of specific disclosure requirements is not yet uniform or clearly documented across jurisdictions**. Crucially, FSSAI HQ has **not** issued a nationwide, binding notification equivalent to the West Region notice. The national stance remains through existing law: FSSR 2011 definitions treat analogues as separate from “milk products”, and prohibit misrepresentation; our review did not identify another FSSAI regional-office notice publicly available that contains an equivalent, express **menu/display-board disclosure direction for cheese analogues**. In sum, only **West Region** formally directed on-menu analogue disclosure (Apr 2026). As of mid-2026, FSSAI HQ has issued national framework and surveillance directions, but the question is whether they are being translated into **consistent, publicly verifiable and consumer-facing implementation across States and Food Service Establishments**.

3.2 Who does the testing

Responsibility is layered, and each layer is a potential bottleneck:

Actor	Role in the testing chain
State Food Safety Officers (FSOs)	Draw and seal samples in the field under the FSS Act; the front line of enforcement, but chronically understaffed.
State / public food-testing labs	Run confirmatory analysis for prosecutions; capacity, infrastructure and accreditation status vary across laboratories/states.

Actor	Role in the testing chain
FSSAI-notified & NABL-accredited private labs	e.g. ITC Labs and similar; provide accredited dairy-adulteration testing for businesses and, on referral, regulators. Such laboratories may analyse regulatory samples and samples submitted by food businesses, subject to the applicable framework.
FSSAI (central)	Sets the standards and test methods, notifies laboratories, and coordinates national surveys; does not itself run routine field enforcement.

The structural weakness is visible in this table: the substance can only be confirmed by labs; sampling depends on a depends substantially on state/UT Food Safety Officers and other designated enforcement personnels, and the central authority that writes the rules does not run the enforcement.

The availability, capacity and technical scope of food laboratories may also differ across jurisdictions. This can create practical challenges in achieving timely and consistent detection, particularly where analogue products enter fragmented food-service supply chains. The extent of these constraints, however, should be assessed through state-wise data on laboratory capacity, sampling volumes, turnaround times, enforcement actions and staffing rather than assumed.

4. Wider Impacts: Farmers, Economy, and Trust

The consequences of analogue paneer reach well beyond the individual plate.

4.1 Dairy farmers and the milk economy

Every kilogram of analogue paneer sold as dairy paneer can displace demand for milk-derived paneer. In an economy where dairy supports more than 80 rural households—predominantly small and marginal producers, and disproportionately women - that displacement is not abstract. Undisclosed substitution cannibalizes the market for genuine paneer, erodes the brand equity and pricing power of legitimate processors and cooperatives.

4.2 Consumers and the erosion of trust

The core injury to consumers is the denial of informed choice and nutritional security: people pay a paneer price for a product that is not paneer. Beyond the direct nutritional loss, repeated food-fraud scandals corrode public confidence in the entire dairy category punishing honest sellers alongside dishonest ones and pushing wary consumers toward either costly premium brands or resigned acceptance of substitution. Scholarly evidence

confirms the likely confusion. A 2023 Gujarat consumer study (n=852) found **very low awareness** of dairy analogues (milk, paneer, butter and cheese) and focus overwhelmingly on price and taste rather than ingredients. Importantly, **“consumers do not pay much attention to labels, ingredients”**. In other words, even if disclosure were made, many consumers might overlook it unless mandated and emphasized. No equivalent consumer study was found elsewhere in India, but international media note widespread terminology confusion (e.g. debate over calling plant “milk” or “butter”).

Given this, we can anticipate unless the term “Analogue” is clearly prefixed to menu listings (as proposed by FSSAI) and publicized, most consumers will not realize the substitution. This suggests an **information gap**: first, insufficient public awareness of dairy analogues; and second, limited evidence on whether existing disclosure requirements are understood and acted upon by consumers.

5. Implications for Health Inequality

The principal health concern is potential **chronic dietary exposure rather than acute poisoning**. Dairy analogues may use vegetable fats in place of milk fat, and the nutritional profile of these products can vary substantially depending on their formulation. Where industrial trans fats are present, they are of particular concern because substantial evidence links their consumption to cardiovascular disease (Mozaffarian et al., 2006). This is especially relevant in the context of India’s growing cardiovascular disease burden and concerns about the increasing exposure of lower socioeconomic groups to cardiovascular risk factors (Bhatia et al., 2021). India has also adopted regulatory measures to limit trans-fat content in foods, consistent with the WHO REPLACE initiative (WHO, 2018; Chopra et al., 2021).

However, the available evidence does **not establish that all analogue paneer products contain harmful levels of trans fat, higher saturated fat or sodium, or lower protein than conventional paneer**. Such differences cannot be inferred simply from the fact that a product is an analogue. The immediate concern is therefore also one of **transparency and informed consumer choice**: when analogue products are substituted for conventional paneer without clear disclosure, consumers may be unable to determine the ingredients and nutritional composition of the food they are consuming.

5.1 A regressive exposure gradient

Available reporting identifies analogue paneer concentrates where prices are lowest, such as street vendors, cloud kitchens, budget restaurants, institutional catering, which are disproportionate to the food environments of lower-income consumers. But there is currently insufficient nationally representative evidence to establish that analogue use is concentrated in lower-income neighborhoods, or that lower-income consumers are

disproportionately exposed. Wealthier households are more likely to buy branded, traceable paneers or to eat where provenance is disclosed. The result is a **regressive exposure gradient**: the cheaper the meal, the higher the probability of undisclosed trans-fat, loading cardiovascular risk onto those with the fewest resources to manage it. Future surveillance should record not only the number and outcome of samples tested but also **the type of establishment, location, product price point, and consumer setting**.

5.2 Information asymmetry as inequity

Consumers cannot reasonably be expected to determine whether a food described as paneer contains milk-derived constituents merely through ordinary observation. Where composition is not disclosed and enforcement is inconsistent, consumers with fewer opportunities to access information may be less able to avoid products they would not knowingly purchase. **When protection tracks information, and information tracks privilege, the market silently redistributes risk downward.**

5.3 Nutritional uncertainty among the protein-insecure

Where analogue products differ materially in protein, fat, energy or other nutritional characteristics from conventional paneer, undisclosed substitution can prevent consumers from making choices based on the nutritional composition they expect. This evidence gap could be addressed through systematic comparative testing of **milk-derived paneer and commonly marketed dairy analogues**

5.4 A geography of protection: the federalism lottery

Because enforcement is a state function, a consumer's protection depends on where they reside. A diner in Maharashtra, Gujarat, or Chhattisgarh benefits an active ban; a diner elsewhere may not, even where local testing reveals worse failure rates. Uttar Pradesh, notably, has reported some very high sample-failure rates in the country yet has not imposed a comparable ban; refer (Figure 2). This **“postcode lottery”** of food safety tends to track state fiscal and administrative capacity: better-resourced states are able to mount testing drives and bans, whereas poorer states frequently those with larger vulnerable populations—cannot. Disparity itself should be treated as an accountability and data-transparency question.

The equity bottom line

Undisclosed analogue paneer raises concerns about **consumer choice, unequal access to information, and uneven enforcement**. Its effects on low-income consumers and dairy farmers require further evidence, but clear disclosure, systematic testing and consistent enforcement are essential to ensure food safety and equity.

6. Why Some States Have Banned It

As of August 2026, **Chhattisgarh, Maharashtra and Gujarat have taken state-level action against analogue paneer**. Maharashtra issued a **one-year prohibition** on the manufacture, storage, transportation, distribution and sale of analogue paneer on 30 July 2026(notification issued). Gujarat subsequently extended restrictions to **analogue paneer, cheese and butter**, while Chhattisgarh also introduced restrictive measures. Maharashtra FDA Commissioner “**Tukaram Mundhe**” said the decision was prompted by findings of high vegetable-fat content and the sale of non-dairy analogue products as paneer without adequate disclosure. He described this as misleading to consumers and said the prohibition would apply across manufacturers, processors, distributors, sellers and hotels.

Three motivations recur. **Evidence of widespread failure:** Maharashtra tested 308 samples over April 2025–March 2026, of which 109 (35.4%) of paneer samples in Maharashtra failed quality standards (non-dairy substitution suspected (Figure 2). **Consumer deception:** regulators characterized the sale of analogue product as genuine paneer as an “unfair trade practice.” **Precaution pending national rules:** the bans are explicit stopgaps “until final FSSAI guidelines are rolled out.”

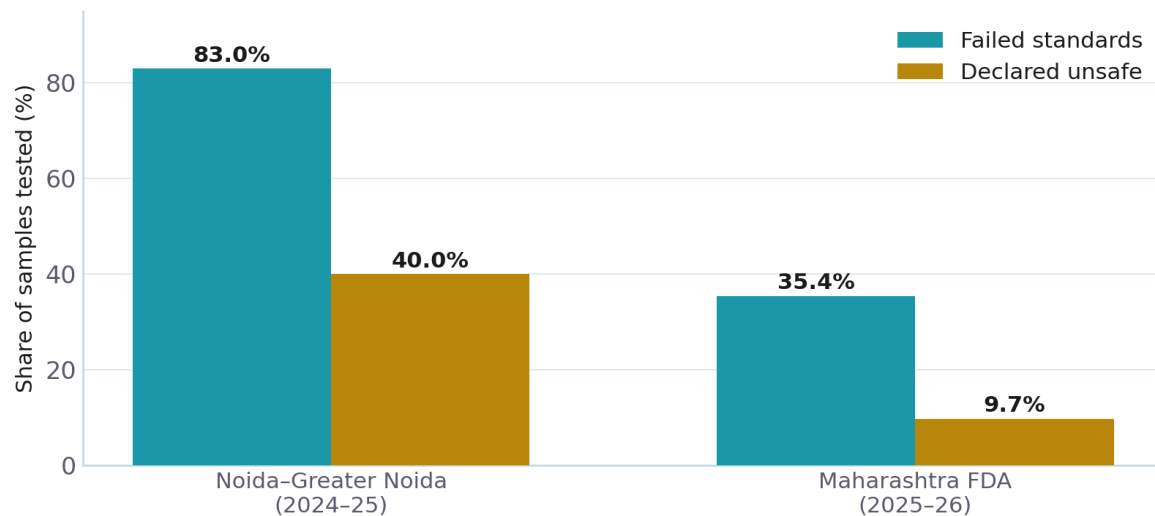


Figure 2. Results of targeted paneer-testing drives: samples failing standards and those declared unsafe. Percentages describe tested samples, often drawn from suspect supply, not the market as a whole.

7. Why Other States Have Not

The more revealing question is why most states have not followed. The restraint is largely structural.

- 1. Analogue paneer is legal.** A blanket ban prohibits a product national law permits when labelled, forcing states to invoke the emergency provision in Section 30(2)(a), a legally aggressive, temporary instrument vulnerable to challenge as standing policy.
- 2. Enforcement is a state subject.** Capacity varies enormously; a state that cannot staff routine inspections cannot police a ban, making a paper prohibition worse than none.
- 3. A preference for disclosure over prohibition.** Several states and the Union government favour mandatory menu and label disclosure—ending the deception while letting the lawful product exist.
- 4. Economic and livelihood concerns.** Analogue paneer underpins a large, low-margin informal food sector; a ban raises input costs for countless small vendors, with employment consequences states weigh carefully.
- 5. Waiting for the centre.** With FSSAI preparing national disclosure guidelines, many states prefer a uniform rule to a litigable patchwork of their own.

8. Why FSSAI Struggles to Contain the Problem

FSSAI's difficulty is one of architecture, resources, and incentives rather than missing rules.

8.1 A split mandate

FSSAI establishes the national regulatory framework, while **States/UTs are primarily responsible for field enforcement**, including inspection and sampling. This makes consistent implementation dependent on state-level administrative and laboratory capacity.

8.2 Chronic shortages of inspectors and laboratories

There is a dire need for States/UTs to fill vacancies and strengthen enforcement capacity in FSSAI. Its laboratory network is extensive but differentiated by testing capability and workload; FSSAI's INFoLNeT system allocates samples according to laboratory facilities, geography and workload. For analogue paneer, laboratory testing is particularly important where authorities need to establish compositional or adulteration-related non-compliance. The availability and scope of testing therefore directly affect the ability to identify violations.

8.3 Weak deterrence downstream

Even when violations are found, the chain leaks: conviction rates remain low, and fines are often too small to deter offenders for whom the cost saving dwarfs the penalty.

8.4 The legality trap and supply-chain opacity

Because analogue paneer is lawful when labelled, the offence is the *mislabelling*, not the product and until recently restaurants had no disclosure obligation even as manufacturers did. As FSSAI's leadership has put it, "selling analogue paneer isn't an issue, the nomenclature is." Policing nomenclature across millions of dispersed, informal outlets is far harder than banning a substance, and restaurants often source analogue product unknowingly, so culpability is diffuse.

8.5 Reform under way—but important questions remain

The continuing variation in state-level responses raises a larger policy question: **what is the evidence-based rationale for permitting analogue paneer as a distinct category rather than prohibiting it, particularly where other clearly identified protein alternatives are available?**

Further, why analogue paneer continues to be permitted; what specific consumer, nutritional or functional need it is intended to meet; whether its benefits justify the potential nutritional and consumer-protection concerns; and what comparative

evidence FSSAI has on analogue paneer versus conventional paneer and alternative protein sources such as tofu. FSSAI should also clarify whether it has nationally representative data on the composition of analogue paneer—including protein, saturated fat, industrial trans fat and sodium—and whether such evidence has informed the decision to regulate rather than prohibit the category.

The central question is not whether every analogue product is inherently unsafe. It is whether **the continued permission of analogue paneer is supported by sufficient evidence, whether consumers can reliably distinguish it from genuine paneer, and whether existing enforcement mechanisms are adequate to ensure that distinction in practice.**

The disclosure that does not happen

The gap between regulation and the consumer's plate remains significant. FSSAI's 2025 consultation paper proposed clearer nomenclature for dairy analogues, including the use of terms such as “Non-dairy” or “Analogue”. In April 2026, FSSAI West Region went further, directing centrally licensed food-service establishments to disclose the use of cheese analogues on menus or display boards and stating that selling or serving a cheese analogue as paneer violates the law.

The challenge is therefore increasingly one of **implementation and enforcement**. Where businesses use cheaper analogue inputs, failure to disclose their use can allow a product to be presented at a conventional paneer price without giving consumers meaningful information about its composition. The economic incentive to maintain price parity may therefore conflict with the consumer-protection objective of transparent disclosure.

The problem is not simply whether a labelling rule exists; it is whether that rule is **visible to consumers, understood by them, and consistently enforced at the point of sale.**

9. Recommendations

Where a regulatory framework permits the manufacture and sale of a lawful dairy analogue but prohibits its misrepresentation as a dairy product, what mechanisms exist to ensure that the consumer's right to accurate information, informed choice is effectively realised in practice, irrespective of State, income, location or type of food-service establishment?

1. **Promote a consistent disclosure framework nationwide**
Develop clear and consistent guidance on disclosing the use of dairy analogues across food-service establishments like restaurants, caterers, institutional kitchens and digital food-ordering platforms, including menus, display boards and other consumer-facing materials. Assess variations in implementation across States, FSSAI regions and food-service settings, and strengthen guidance or support where differences may affect consumers' access to information.
2. **Strengthen monitoring and compliance**
Build on FSSAI's March 2025 surveillance direction by strengthening routine monitoring of dairy analogues through inspections and checks of labelling and disclosure practices. Encourage systematic reporting of surveillance findings, non-compliance and enforcement actions to enable better assessment of how the regulatory framework is being implemented across States and UTs.
3. **Strengthen disclosure at the point of purchase**
Ensure that information on the use of dairy analogues is clearly available where consumers make purchasing decisions, including in food-service establishments and, where applicable, digital ordering platforms.
4. **Use clear and standardised terminology**
Use simple and standardised terminology so consumers can readily understand terms such as "dairy analogue", "analogue paneer" and "analogue cheese", supported by appropriate consumer awareness efforts.
5. **Generate evidence on nutritional composition and health implications**
Comparative laboratory testing of analogue and conventional paneer is therefore needed to determine differences in fat composition, trans-fat content, saturated fat, sodium, protein and other relevant nutritional characteristics, and to establish whether such differences have meaningful implications for population health and health inequality.

10. Conclusion

Analogue paneer illustrates a broader structural problem in the political economy of food safety: **a cheaper, lawful substitute can become a consumer-protection problem when it is presented as conventional paneer without adequate disclosure.** The 2026 state interventions reflect genuine regulatory concern over non-compliance and consumer misrepresentation, but their uneven application also raises questions of consistency and equity.

FSSAI's challenge is therefore not simply to create another rule, but to make existing standards **visible, enforceable and consistent**—through stronger testing, clear disclosure, effective deterrence and transparent state-wise enforcement. The priority should be ensuring that consumers can know what they are buying, regardless of where they live or where they eat.

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