

Animal Protein - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2017 - 2029

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Report description:

The Animal Protein Market size is estimated at USD 9.41 billion in 2024, and is expected to reach USD 11.97 billion by 2029, growing at a CAGR of 4.93% during the forecast period (2024-2029).

Clean-label food and beauty products are largely making up the segmental growth in the market

- Food and beverage emerged as the largest animal protein end-user segment, mainly benefiting from the growing demand for high-end, premium food products. Claims such as organic, sustainable, and grass-fed are gaining popularity among consumers, leading manufacturers to roll out suitable offerings. In response, manufacturers such as Arla, Milk Specialties Global, and Kruger were seen expanding their clean-label animal protein production applicable to the food and beverage segment. The segment is also set to record a significant CAGR of 4.29%, by value, during the forecast period.

- Supplements is the second-largest segment, followed by animal feed, personal care, and cosmetics. Among supplements, the sports nutrition sub-segment led the market due to increasing fitness activities and consumers opting for supplements to aid their workout regimes. In 2022, sports nutrition held a 74.6% share of animal protein consumed by the supplements sector.

- In terms of growth, personal care and cosmetics outpaced other segments, recording a projected volume CAGR of 6.64% during the forecast period. The growing interest in protein-fortified personal care products is driving the segment's growth. For instance, 95% of US females look for specific ingredients in their skincare products, leaving immense scope for segmental growth with growing interest in products fortified with keratin.

- The growing acceptance and need for protein foods globally is one of the major factors driving the market. In 2021, about 75% of global consumers paid a higher price for protein-fortified food and beverages. In the same year, more than half of global consumers paid a 10% premium, and an additional 15% paid a 25% premium.

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Asia-Pacific and North America regions drive the demand with growing fitness enthusiasts in the market

- Asia-Pacific held the largest market share in 2022, led by China, which accounted for a market volume of 33.8%. The demand is driven by increasing active lifestyle users and their demand for high-protein diets. Food and beverage emerged as the largest segment in the market for applications and evolved predominantly as the most accepted form for the consumption of animal proteins by consumers in the region. Particularly in China, in 2021, about 80-85% of fitness enthusiasts chose high-protein foods, including protein powders and shakes, as a major source of energy and to strengthen muscles. In addition, besides occupying the largest share, with a value CAGR of 5.13%, the region is set to outpace the global growth rate during the forecast period.
- North America follows close behind, driven by high whey protein integration in the protein powder and snack bar categories. In 2022, whey protein accounted for about 47% of the overall animal protein demand in the region. Consumers in the region are becoming increasingly concerned about healthy eating and now prefer a whey protein-based diet. Moreover, the average protein content of whey protein is 40% higher than other animal protein types, such as milk protein, which is driving its applications in various end-user segments, such as the sports nutrition segment, in the region.
- However, the Middle East is the fastest-growing region and is projected to record a CAGR of 5.84%, by value, during the forecast period. The increasing preference for functional food and bakery sectors spiked the demand for dairy ingredients in countries like UAE and Saudi Arabia. Additionally, the strong demand is being augmented by continuous R&D in the UAE market, driven further by both local and foreign firms.

Global Animal Protein Market Trends

Animal protein consumption growth fuels opportunities for key players in the ingredients sector

- Increased awareness about health benefits and the growing adoption of dairy proteins in dietary supplements by consumers, especially sportspeople, are driving per capita consumption. In 2021, India consumed the most cow milk worldwide, drinking about 83 MMT, followed by the European Union, at 23.9 MMT. The industry expanded as physical fitness became more popular among consumers who regularly played sports or engaged in other forms of physical activities. Therefore, casein, the primary milk protein component, is widely regarded as a valuable source of amino acids for human growth and is utilized as an ingredient in a variety of foods, including infant formula, sports, nutritional beverages, and confectioneries.
- Other animal protein ingredients, such as gelatin, are more widely used in cosmetics and nutraceuticals. In 2020, the countries with the highest trade value in imports of gelatin were the United States (USD 180 million) and Japan (USD 75.8 million). Collagen and gelatin are frequently utilized in cosmetic formulations due to their excellent qualities as natural humectants and moisturizers. As a result, cosmetic companies are always on the lookout for new, sustainable, and effective products, making marine gelatin-based compositions viable options.
- The highest per capita consumption of cheese is currently recorded in North America and Europe, which is expected to continue in the coming years due to the changes in local preferences and growing urbanization. The average amount of cheese consumed in the European Union in 2021 was 20.44 kg, followed by the United States, with roughly 17.9 kg of cheese per person. The demand for milk proteins is driven by their use in various applications, including in regions where the demand for animal proteins is increasing faster than production.

Dairy ingredients play a significant role in supplying animal protein raw materials

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- The production of whey and casein protein types is mainly driven by the supply from cheese production plants since they are the two major byproducts of cheese. However, in the case of caseins/caseinates, a price of about USD 2.40 per pound would be necessary to induce domestic plants to divert fluid skim milk from the production of non-fat dry milk to the production of caseins. Worldwide 22,651,606 tonnes of cheese was produced per year as of 2020, thus, impacting the scope for the production of dairy proteins such as casein and caseinates and whey proteins. The United States is the largest cheese producer in the world, at 5,584,857 tonnes of production per year.
- In the United States, milk ingredient manufacturers have become increasingly specialized in the production of milk proteins. This production in the United States doubled over 2020, and micellar casein concentrate ingredients became newly available. Among all, micellar casein gained significant market penetration in the study period due to its high protein content (90% un-denatured protein) and high levels of bioavailable calcium. The demand for dairy-based proteins is growing primarily due to the need for ingredients with higher protein concentrations.
- Pork is the most used raw material for producing gelatin because of its amino acid content. France produces 23 million pigs every year. The industry, comprising over 100,000 professionals, is Europe's second-largest meat processing industry. India is the top country in the number of cattle and buffaloes in the world. As of 2020, the number of cattle and buffaloes in India was 305,500 thousand heads which accounts for 33.38% of the world's total cattle and buffaloes. Surplus meat production is further pushing gelatin production

Animal Protein Industry Overview

The Animal Protein Market is fragmented, with the top five companies occupying 30.92%. The major players in this market are Arla Foods AmbA, Darling Ingredients Inc., Fonterra Co-operative Group Limited, Glanbia PLC and Royal FrieslandCampina NV (sorted alphabetically).

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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