

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

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Report description:

The Asia-Pacific Animal Protein Market size is estimated at USD 2.87 billion in 2024, and is expected to reach USD 3.70 billion by 2029, growing at a CAGR of 5.21% during the forecast period (2024-2029).

Clean-label environment with innovations in the sector drove the segmental growth

- The F&B segment remained the largest consumer of animal proteins in the Asia-Pacific animal protein market. It was highly driven by the snacks, beverages, and bakery sub-segments, which accounted for shares of 26.93%, 23.79%, and 20.5%, respectively, by volume in 2022. The bakery sub-segment is projected to record the fastest CAGR of 5.70% by value during the forecast period 2023-2029. The application of casein and caseinates is driving the bakery sub-segment in the region. Its ease of digestion has expanded its use in highly nutritious biscuits like Threptin Biscuits (Diskettes), where it can increase the protein value of the biscuit to 1.5 grams per biscuit, which can be consumed by both children and adults.
- The F&B segment recorded high demand for whey protein and gelatin. The market largely benefits from introducing new and improved protein offerings. For instance, in 2020, Arla Foods created its first clean-label environment yogurt concept, Nutrilac YO-4575, which contains 100% natural whey protein. Similarly, in May 2021, Darling Ingredients Inc.'s Rousselot brand expanded its range of purified, pharmaceutical-grade and modified gelatin with the launch of X-Pure GeIDAT - Gelatin Desaminotyrosine.
- The personal care and cosmetics segment is projected to be the fastest-growing segment with a CAGR of 7.59% by value from 2023-2029. Owing to the rising consumption of collagen and gelatin-based beauty and personal care products, the personal care segment is recording increased protein applications due to its benefits, such as skin smoothing and hair conditioning. However, the rising disposable income and the growing women's working population are key drivers. For instance, in Asia-Pacific, women contributed around 35-40% of the region's GDP in 2021.

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Growing demand from countries like China, India and rest of Asia-Pacific segments drive the segmental growth

- In the Asia-Pacific region, China recorded the largest share of the Asia-Pacific animal protein market in 2022, driven by the food and beverage sector, which held a significant share of 74.7% by volume, followed by the animal feed sector, with a share of 16.75% by volume. Beverages are the major sub-segment for applications of animal proteins in the food and beverages sector. This is due to improved solubility of animal proteins such as whey protein, milk protein, gelatin, collagen, and casein and caseinates. China, the second-largest beef- and veal-producing country, with a production of 7,125,000 ton in 2022, possesses a flourishing animal feed sector and is recording a significant influx of animal proteins in formulations.
- India is the fastest-growing country in the region and is projected to record a CAGR of 6.26% by value during the forecast period. During the review period, India saw the highest demand for gelatin protein, as it acts as a gelling agent, notably in soft gummy sweets, and acts as a stabilizer and whipping agent in marshmallows due to its thermo-reversible capabilities. Both new entrants and established businesses from other sectors may capitalize on the market's development potential by expanding their services in the country.
- Indonesia emerged as another growing country in the APAC animal protein market in 2022, driven by high protein consumption in the supplements segment because of the widespread attention that whey protein gained due to its functional benefits. It has become the choice of fitness-oriented Indonesian consumers, creating a demand for products containing whey in the country. As of August 2020, around 30% of consumers aged 18 or above had fitness club memberships. Such developments are boosting the market studied.

Asia-Pacific Animal Protein Market Trends

Whey and milk protein to increase its share in animal protein consumption

- Japan has become the main market of whey proteins in the Asian market. Consumers are opting for whey products due to sporting events that took place in the region, like Olympic Tokyo Games in 2020 and the Rugby World Cup. The sports events and the growing older population in Japan are driving serum consumption as the main protein supplement in sports nutrition and elderly nutrition, respectively. The increasing awareness about the benefits of proteins among the Japanese military is also boosting the consumption of whey proteins. India is one of the fastest-growing countries in the world. The country's food sector has tripled over the past ten years, and it is expected to follow the same trend over the next decade.
- Currently, the animal protein market in China is witnessing a steady development. With the improvement of living standards in China, consumer safety requirements for food and drugs have improved. China has seen a decline in its pig herd of almost 40% due to the deficit created by African Swine Fever in the last two years and an increase in the importation of animal proteins during the past two years. However, as the cost of pigs increased to nearly USD 5 per kilogram, consumers are looking for substitutes like chicken or beef.
- Whey protein concentrates offer versatile benefits, including efficient and easy-to-digest processing and inexpensive applications, which are contributing to India's market growth. They have a wide range of applications in the sports nutrition category. Owing to the increased consumption of sports nutrition among young Indians, the demand for whey protein concentrate also increased. The per capita consumption of whey protein in the country increased to 17.2g in 2022 from 14g in 2017.

Milk and meat production contributes majorly as raw material for animal protein ingredients manufacturers

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- Most animal proteins are produced with raw milk as the raw material. India is the major milk-producing country in the region, followed by China. India produced nearly 96 million ton of cow milk, and China around 35 million ton in 2021. Concentrated Animal Feeding Operations (CAFOs) or factory farms for dairy production plants are being set up across Asia, many housing thousands of cows, by global and new national dairy corporations often working in partnership with governments. The strongest gains in milk production over the past decade have been registered in Southeast Asia.
- China's milk production in the region inclined by 7.06% to 36.8 MMT in 2021. This is due to improved productivity, as the COVID-19 disruption caused China's production and consumption of milk to grow rapidly. Imports are also showing positive growth due to consumer demand and requirements for the manufacturing industries in China. Skim milk powder, which is majorly used for milk protein production, has increased due to the Chinese food industry depending more on imported skim milk powder.
- The animal protein produced from cattle, pigs, and marine waste is used for collagen and gelatin production. Collagen is widely used by Gen Z and younger millennial women for personal and sports nutrition, whereas gelatin has a broad application in the food and beverage sector. Its production is improving significantly in countries like India and China, supported by government initiatives and the construction of new modern slaughterhouses across the countries. The overall pig production declined in 2020 as African Swine Fever continued to impact China's hog industry. However, in 2021, beef production in China was 697.51 thousand ton, whereas pork production was around 5295.93 thousand ton.

Asia-Pacific Animal Protein Industry Overview

The Asia-Pacific Animal Protein Market is fragmented, with the top five companies occupying 9.48%. The major players in this market are Arla Foods amba, Darling Ingredients Inc., Fonterra Co-operative Group Limited, Kerry Group PLC and Koninklijke FrieslandCampina N.V. (sorted alphabetically).

Additional Benefits:

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

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