

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

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Report description:

The Collagen Market size is estimated at USD 1.32 billion in 2024, and is expected to reach USD 1.78 billion by 2029, growing at a CAGR of 6.16% during the forecast period (2024-2029).

Personal care and cosmetic segment is expected to gain higher sales in forecast period due to growing consumer preferences for collagen-based beauty products i.e. beneficial for skin

- By end user, F&B remained the largest segment, with the majority of applications in the beverage, bakery, and snacks sub-segments. The segment is also anticipated to drive the market with a CAGR of 5.80%, by volume, in the forecast period. This demand can be attributed to its multi-functionality and nutritional benefits.

- However, in the forecast period, collagen application in the personal care and cosmetics segment is projected to outpace other segments with the fastest CAGR of 6.84% by volume. The segment highly uses collagen in the hydrolyzed form, owing to its negligible skin irritation, sensitization, or indication of phototoxicity. Protein fortification has become a major interest among global consumers, with a rise in their health concerns. For example, in 2021, 75% of global consumers paid a higher price for protein-fortified food and beverages, while more than half paid a 10% premium, and 15% of consumers would be willing to pay a 25% premium.

- The beverages sub-segment is the largest end-user segment in the collagen market and represents over 41.6% of the total consumption volume in 2022. The collagen drinks market is in its early stages of development. As consumers become increasingly aware of the health benefits of the beverages they consume, it may result in an increase in the overall market for collagen drinks. Collagen-based drinks are high in hydroxyproline, amino acids glycine, arginine, and proline, which are associated with energy supply, cell regeneration, and metabolism. Collagen can be used in many hot beverages, which paves the way for innovative

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products with health benefits. Hence, the consumption of collagen-enhanced hot beverages such as coffee and hot chocolate is increasing at a high pace.

Asia-pacific accounted majority of share in 2022 due to growing popularity of collagen based products coupled with strong presence of various manufacturing units

- The Asia-Pacific collagen market is the largest, owing to the higher production of raw materials in the region, mainly in China and India. In China, collagen application in supplements is not only used for skin beauty but also beneficial for immune, joint health, and sports performance. Collagen sales in the region are being driven by the aging population and companies that are progressively adding collagen-based ingredients to their product lines. In Southeast Asia, the proportion of individuals aged 60 years and older was 9.8% in 2017, which is projected to rise to 13.7% by 2030.

- Europe is the second-largest regional segment for the market and is also projected to record the fastest CAGR of 6.48%, by value, during the forecast period, attributed to a rise in regional players catering to the surging demand by adopting distinct strategies like constant product innovation for highly potential end-user segments, like personal care and cosmetics. The growing popularity of collagen-based beauty drinks and collagen peptide-based beverages like Sanotact and BeautyHacker beauty collagen drinks in Germany contributes to this growth.

- Middle East & Africa is another promising market, as most consumers follow Islamic principles, thus creating opportunities for market players in the region to supply collagen sourced from halal sources or marine-based collagen/ With the introduction and implementation of religion-based policies, the demand is anticipated to increase, primarily to render flexibility for using collagen-based products. The marine-sourced collagen market in the Middle East and African regions is projected to record a CAGR of 7.47% and 8.21%, respectively, during the forecast period.

Global Collagen Market Trends

Healthy snacking preference to support market growth

- Consumers across the world are increasingly adopting a snacking lifestyle and becoming more health-conscious. They also prefer nutritious alternatives to traditional snacks. In June 2021, in the United Kingdom, approximately 25% of Gen Zs (16-24 years old) preferred "low in calories" snacks, 18% of millennials (25-34 years old) prioritized healthy snacks high in protein, and 36% of individuals over 55 looked for "low" or "no sugar" in their snacks. Thus, established industry operators have developed various low-fat and low-calorie options.

- In 2020, the onset of COVID-19 and consequent lockdowns resulted in the snack market's unprecedented growth of 14.51%, compared to 3.12% growth in the previous year. Due to scarcity or limited stock, consumers began looking into new brands and snack options while panic buying increased. Due to limited restaurants being open, people continued to eat at home. This factor allowed producers to create unique flavors based on their customers' preferred restaurant menus, boosting the country's snack market. Whisps Snack, for instance, debuted its tangy ranch cheese crisps and nacho cheese crisps in 2020. Two new Popchips product lines were introduced by Velocity Snack Brands in 2020.

- As users frequently discover food trends, inspiration, and connections on their feeds, social media is becoming a more important source of discovery, which is benefitting the snacking market. More than half of the consumers worldwide, including even greater majorities of Gen Zs (70%) and millennials (71%), believe that social media has encouraged them to explore a new snack in the past year.

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Meat production contributes majorly as raw material for collagen manufacturers

- Pea protein is experiencing rapid growth because of its nutritional properties, boosting the country's sales of protein-fortified and vegan foods. The shift in preference of the consumers is a major driver for pea protein sales in Spain. About 6% of Spanish consumers follow a plant-based diet, whereas 30% identify as flexitarians. About 47% of Spanish customers are likely to buy plant-based meat regularly if it has the same flavor and texture as animal-based meat.
- There is an increased scope for meat alternatives. About 25% of Spaniards tried vegetable meat alternatives in 2020, and 43% want to reduce their consumption of red meat. The Spanish lifestyle has changed dramatically in recent years. In 2017, 5.1 million consumers turned flexitarian, vegetarian, or vegan, in line with growing health concerns, despite being a traditionally meat-eating nation. Thus, the demand for pea protein is growing as consumers switch to plant-based diets.
- The demand in the food and beverages segment is highly driven by the meat/meat alternatives sub-segment, which held a share of 65.8% by volume in 2022 and is anticipated to register a CAGR of 10.26% during the forecast period. Pea protein is a preferred protein source by meat substitute manufacturers due to its nutritional value, texture, and fat-binding properties. Companies are investing heavily in the country to set up facilities for producing pea protein ingredients to capitalize on future demand. For instance, in February 2021, Dacsa Group launched the Pesol Pea project, the first wet-textured protein plant in Spain. Pea protein is at the center of the project, as the company plans to produce a clean-label, vegan, and non-GMO protein solution.

Collagen Industry Overview

The Collagen Market is fragmented, with the top five companies occupying 11.77%. The major players in this market are Darling Ingredients Inc., GELITA AG, Italgelatine SpA, Nippi. Inc. and Nitta Gelatin Inc. (sorted alphabetically).

Additional Benefits:

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

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