

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

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### **Report description:**

The Europe Animal Protein Market size is estimated at USD 2.16 billion in 2024, and is expected to reach USD 2.72 billion by 2029, growing at a CAGR of 4.72% during the forecast period (2024-2029).

F&B and supplements together accounted for more than 50% of share in 2022 due to rising number of fitness enthusiasts coupled with increasing demand for protein-based food products across the region

- The market has animal protein applications in many end-user segments, primarily driven by the F&B and supplements segments. In 2022, the two segments together held a share of 40% of animal protein volume consumed in Europe. Increased consumption of gelatin as an emulsifier in protein-based products is the major factor driving the market. In 2021, 60% of millennials and Gen Z consumers sought curated baked bakeries that offered functional bakery goods in Europe.

- The supplements have been gaining acceptance among the rising number of fitness enthusiasts in the region. In fact, under the supplements segment, sports/performance nutrition remained the most dominant and yet the fastest-growing sub-segment, with a projected CAGR of 5.40%, by volume, during the forecast period. Over the review period, the number of members in health and fitness clubs in Europe rose by about 12 million. This increase portrays a vast potential for products like protein powders. Top athletes are increasingly influencing millennials worldwide. Due to this, the demand for energizing products and weight management sports nutrition is surging.

- Insect protein dominates the animal feed market and is anticipated to register a CAGR of 2.39%, by value, throughout the forecast period. In Europe, more than USD 1 billion has been invested in this sector since its establishment, and this figure is expected to reach USD 2.95 billion at the end of the forecast period. The use of insect-processed animal proteins (PAPs) in poultry and pig feed was approved by the European Union in 2021, which is expected to create new opportunities, beginning with the

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introduction of such components into such animals' diets.

Russia holds significant share in 2022 due to strong demand of animal protein from Russian bakeries

- By country, Russia retained its top position in 2022. Food and beverages remained the largest consumer of animal proteins, with the bakery segment accounting for a major volume of 54% during the base year. Animal proteins, such as gelatin and collagen, are widely used in making cakes and pastries. Cakes and pastries make up the second-largest industry, holding 11% of the market shares in the region. An average Russian citizen consumes about 260 pounds of baked goods per year. In 2020, the country had over 690 large bakeries, 4,800 mid-sized enterprises, and more than 7,000 small and micro-bakeries.

- The UK whey protein market holds a share of 26.27% in Europe. It is one of the strongest markets in Europe. Whey protein has increased applications in the supplements and food and beverage industries in the United Kingdom. Almost 3.5 million Britons were recorded to have had type-3 diabetes in 2020. To cope with diabetes, whey protein is effective as it instantly increases the insulin level. The intake of whey protein supplements helps people with type-3 diabetes control their blood sugar levels. As a result, there is a steady increase in the demand for whey protein in the supplements segment.

- Germany holds a significant share of the animal protein market. Gelatin protein (26.85%) and whey protein (20.14%) hold the major market shares in the country. Gelatin protein is dominated by the food and beverage sector, and the beverage sub-segment is the fastest-growing in the market. In 2021, an average German consumed 9.9 liters per capita of fruit juice. Gelatin is effective in removing fruit juice precipitates that might cause haze. Gelatin, when used in doses of 1%-5% concentrations, aids the retention of natural fluids and improves texture and flavor.

#### Europe Animal Protein Market Trends

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

- Germany is one of the leading producers of dairy products in Europe. The German milk processing sector generated sales of about EUR 29.6 billion in 2021 (excluding ice cream producers). With nearly 4 million cows in the country, the milk yield per cow in Germany was 8,488 kg. The per capita consumption is associated with an average daily protein intake of around 104 g protein per capita a day or 6.1 kg protein-N per capita and year. Germany is one of the largest exporters of dairy products, with a share of 15%, alongside France and New Zealand. The recommended intake of proteins is 0.83 g/kg/d for adults in good health.

- The market for whey protein is mainly driven by the growing popularity of fitness centers and health clubs, which has led to a rise in whey consumption. The annual whey protein import increased exponentially by 15.09% in 2021 from 2019. However, with a great focus on overall health and consumers' interest in clean-label products, the demand for natural ingredients has been growing in the sports nutrition sector. Ingredients, such as organic and grass-fed whey, have gained prominence due to both health as well ethical concerns.

- Women are looking for sports nutrition supplements to seek a lean body, strength, and performance. Encouragement from nutritionists and other fitness experts is also boosting the market sentiment for sports nutrition in the region. Growing veganism, demand for plant-based products, and changing dietary preferences among consumers are being witnessed globally. The low inclination toward meat-based products is visible among consumers, which is a major restraining factor for the animal protein market. The number of vegans in Europe doubled from 1.3 million to 2.6 million, representing 3.2% of the population in 2021.

Meat and milk production contributes majorly as raw material for plant protein ingredients manufacturers

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- Animal proteins such as milk protein, whey protein, and casein and caseinates are derived from milk. Germany is the leading producer of milk in the European Union, accounting for more than 21% of milk deliveries in the European Union in 2020. Although the country has been observing a decline in the count of cattle farms, the average size of the farms is witnessing an upsurge. The rise in milk production is attributed to the escalated volume of milk production per cow. Over the years, milk production has been concentrated in the grassland regions of northwestern and southern Germany.
- Dairy proteins are the leading proteins manufactured in the EU region because the EU and the United Kingdom are considered the largest traders of cheese. In 2020, the OECD noted a meteoric production growth of whey and casein proteins in the EU, primarily due to the escalated cheese demand in EU countries. As stated by the OECD, cheese volume production spiked, touching 10.44 million ton in 2020. Amid the COVID-19 pandemic, the EU government highly supported manufacturers in processing fresh milk into storable milk items, like cheese, which consequently boosted protein production.
- Collagen and gelatin are pure protein forms of animal protein produced using raw materials from the meat industry. France has Europe's largest cattle herd, with over 19 million cattle, more than any other European country. With nearly 3.7 million dairy cattle and over 4 million suckler cows, France had 34% of all bovine livestock raised for meat in Europe in 2020. There are more than 200,000 cattle farmers in France, producing 1.5 million ton in carcass weight equivalent (CWE) a year, making the country Europe's leading beef producer and the seventh largest in the world.

## Europe Animal Protein Industry Overview

The Europe Animal Protein Market is moderately consolidated, with the top five companies occupying 41.77%. The major players in this market are Agrial Enterprise, Arla Foods amba, Darling Ingredients Inc., Koninklijke FrieslandCampina NV and SAS Gelatines Weishardt (sorted alphabetically).

### Additional Benefits:

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

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