

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

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Report description:

The Europe Protein Market size is estimated at USD 5.61 billion in 2024, and is expected to reach USD 7.01 billion by 2029, growing at a CAGR of 4.56% during the forecast period (2024-2029).

Rising number of vegan and flexitarian population with emerging indulgence towards natural products is making the segmental growth

- By application, the food and beverage industry led the application sector for proteins in the region, accounting for a major volume share. The share was highly influenced by the dairy- and meat-alternative industries that accounted for 23% of the overall proteins consumed in the region. The share is primarily driven by the rising number of vegan and flexitarian consumers who increasingly rely on or are open to animal-free product offerings in the market. As of 2020, the number of vegans in Europe has doubled from 1.3 million to 2.6 million, representing 3.2% of the population. However, despite the largest share, the food and beverage market is yet to outpace its growth rate, and it is anticipated to register a volume CAGR of 4.17% during the forecast period.

- It is followed by the animal feed segment, which is largely driven by the application of plant proteins, which is also anticipated to register the fastest growth rate of 4.28% during the forecast period. This is largely due to growing government initiatives in the plant protein segment. For instance, in 2022, EU member states joined forces to call for a continent-wide plant protein strategy, which they say is needed "more than ever" in light of the war in Ukraine. This European strategy would bolster the already existing commitment of the EU executive, which, in a 2018 report, called for the development of plant proteins in the European Union.

- By value, among all the end-user segments, the personal care and cosmetics segment is anticipated to register the fastest

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growth rate of 5.04% during the forecast period. The emerging indulgence toward natural products with rising interest in the list of ingredients is highly driving growth. About 37% in Germany and 27% in France used a natural/organic cosmetic in 2021.

growing demand for healthy food is driving the regional demand with demand dominated by Russia, France and rest of Europe segments

- With the region's rising health consciousness, the Rest of Europe segment, which includes countries like Ukraine, Poland, Greece, Austria, Belgium, and Norway, dominates in terms of protein consumption. In 2021, healthy food consumed in eight of the European Union's member countries accounted for about 70% of the total. About one-third of the population in Belgium consumed vegetarian burgers in 2022. For the uninitiated, over 25.8% of residents in Austria were flexitarian in 2022, driving the consumption of protein foods.

- Russia remained the largest protein consumer in the region, after the Rest of Europe segment. Heavy product developments, government initiatives, investments, and high demand from the food and beverage sector drove the demand. Among all protein types, the country's protein consumption is largely driven by plant protein types, with a market share of 61.3%, by value, in 2022. The market is witnessing high demand for animal-free protein alternatives, with a growing number of vegetarians in the country. Soy protein dominates consumption in the country, with a value share of 36%, by value, in 2022.

- Among all the countries, France is anticipated to record the fastest growth rate during the forecast period, registering a CAGR of 5.02% by volume. The country's protein consumption is largely driven by the meat and meat alternatives segment, with the consumers growing preference for plant-based meat products. The country has a growing vegan and vegetarian population, largely driving the segmental growth. For instance, vegetarians and vegans represent 2% of the French population (about 1.3 million people) and 0.5% (about 340,000 people), respectively, while flexitarians represented nearly 23 million people in 2021.

Europe 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.

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

- 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 Protein Industry Overview

The Europe Protein Market is fragmented, with the top five companies occupying 32.17%. The major players in this market are Archer Daniels Midland Company, Darling Ingredients Inc., International Flavors & Fragrances, Inc., Kerry Group plc and Royal FrieslandCampina N.V (sorted alphabetically).

Additional Benefits:

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

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