

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

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### **Report description:**

The Europe Whey Protein Ingredients Market size is estimated at USD 409.65 million in 2024, and is expected to reach USD 518.17 million by 2029, growing at a CAGR of 4.81% during the forecast period (2024-2029).

Rising fitness trend among young population resulted increased market share of supplements across the region

- In 2022, food and beverage remained the largest consumer of the whey protein segment in Europe. The segment's larger share was primarily contributed by its sub-segments, such as snacks, bakery, and beverages, which held a share of 37% by volume in 2022. In the snacks category, in 2021, 46% of European consumers considered protein bars healthy snacks, and 16% of consumers used protein-fortified snacks, such as protein bars, powders, cereals, and pancakes once a week. This demand drives the whey protein market in the snacks category, and it is projected to register a CAGR of 2.30% by value in the forecast period.
- The market witnessed consumer diversion from the foodservice to the retail channel in the wake of nationwide lockdowns imposed to curb the spread of coronavirus. Consumers were engaged in the bulk purchase of food products, which boosted the food and beverage segment's share in 2022. The whey protein demand in the segment grew by 12% in 2022, which was about four times the growth rate of the previous year.
- The food and beverages market was followed by the supplements segment, primarily driven by the sports/performance nutrition sub-segment. In 2022, about 80% of whey protein consumed in the supplements sector was by sports nutrition alone. In Europe, the total number of fitness clubs was 63,173 in 2021. Sport has become a component of an active, healthy lifestyle sought after by many consumers. This active way of life has an effect on the explosion in the use of gyms and the consumption of sports nutrition products. Whey protein supplementation reduces muscle damage and facilitates muscle recovery from strenuous training, thereby assisting sports performance.

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Consumers inclination towards functional beverages has resulted in higher demand for whey protein ingredients

- By country, the United Kingdom retained its top position in the market by volume in 2022. The whey protein demand in the country is majorly led by an increasing number of fitness enthusiasts and a heavy consumer influx in gyms and fitness clubs. For instance, as of 2021, 10.3 million people held a gym membership, which is over 15% of the total UK population. Representing consumers' increasing reliance on performance-boosting supplements over the years. The whey protein market in the United Kingdom is highly driven by the supplements industry (64%), which held a significant share, followed by the food and beverage industry (33.1%) in 2022. Thus, whey protein usage was mainly observed in sports nutrition due to the increasing number of fitness enthusiasts and fitness clubs.

- Germany was another leading country in the market in 2022, driven by high protein consumption in the food and beverage industry. Beverages is the fastest-growing sub-segment, with an expected CAGR of 7.09% during the forecast period. Whey protein demand in beverages is rising with the growing health awareness in the country. Products, such as protein water and energy drinks, are becoming a trend as consumers are choosing to move away from carbonated beverages toward healthier options.

- Turkey is the fastest-growing country for whey protein and is projected to register a CAGR of 6.02% during the forecast period. The healthy eating attitudes of the majority of the participants are at high and ideal levels. In particular, products containing whey protein have gained importance due to the health benefits they offer. The booming trend of healthy food in the country has created a significant demand for ingredients such as whey protein.

#### Europe Whey Protein Ingredients Market Trends

The expanding consumer base may benefit the sports supplements market

- The European sports nutrition market grew by 15% during 2016-2019. However, in 2020, it witnessed a steep decline of 4.33% in the Y-o-Y growth rate. Health clubs, being one of the common sales channels for supplements, impacted the sales of sports supplements adversely as the pandemic took a harsh toll on fitness club operators, employees, and consumers. In 2020, due to government regulations, fitness clubs, health clubs, and gyms were forced to close, and club memberships declined by 10-15% in 2020 compared to the previous year. The number of clubs also decreased under the influence of the pandemic. To regain the market in the second half of 2020, the general VAT rate of 19%, which also applies to fitness services, was reduced to 16% for a limited period until the end of the year to strengthen economic demand.

- The growing number of fitness enthusiasts expands the scope of sports supplements beyond their mainstream users. As consumers flock to buy gym requisites, the demand for health and fitness products is growing, especially in developed countries like Italy, France, and Germany. These countries also emerged as the major spenders on gym memberships, supplements, training, etc. There are around 63,000 fitness centers in the region, and all these clubs jointly witnessed an increase of 3-4% in memberships yearly.

- The demand for sports nutrition products with natural ingredients supports market growth by providing an opportunity for manufacturers to add value to their products. More than 70% of the European sports nutrition market is dominated by the United Kingdom, Germany, Spain, and France. Over 50% of the market share is captured by the United Kingdom and Germany in the sports drinks segment.

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## Increasing dry whey production to stabilize whey protein prices during forecast period

- Europe is a major country in the production of cheese and the largest producer of whey worldwide. 6 million tons of whey was processed in Europe from the production of cheese and caseinates in 2015. Europe exported more than 540 thousand tons of whey globally. China is the first importer of European whey. Germany held a 22% share of the total production of cheese in the European Union in 2017. The considerable inclination toward cheese production is attributed to the rise in consumption and exports of cheese from the country, benefiting the whey protein producers.
- In the United Kingdom, the average yield per cow per annum has increased considerably, approximately by 94% since 1975, up from 4,099 liters to 7,959 liters in 2018. The production of whey protein powder has been surging in the region in the past few years and is expected to continue in the same way in the forecast period, which observed a Y-o-Y growth rate of 1.78% in 2019. In 2019, the average yield per cow per annum increased to 8,144 liters, or by 2.32%, from the previous year. Thus, the total domestic milk production has amplified, from which less than 7% is exported, thereby providing easy access to whey protein manufacturers.
- The demand for dairy alternatives has increased among lactose-intolerant adults in Europe. The expanding food industry in the country experienced a demand for high-quality protein ingredients from consumers, thereby driving the application of whey protein in the region. The production volume of whey powder in Europe is expected to increase continuously by 250 thousand metric tons (+11.27%) in the future. Thus, the production volume is estimated to amount to cross 2.3 million metric tons in 2029.

## Europe Whey Protein Ingredients Industry Overview

The Europe Whey Protein Ingredients Market is fairly consolidated, with the top five companies occupying 86.43%. The major players in this market are Agrial Enterprise, Arla Foods amba, Glanbia PLC, Groupe Lactalis 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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