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

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Report description:

The Gelatin Market size is estimated at USD 2 billion in 2024, and is expected to reach USD 2.51 billion by 2029, growing at a CAGR of 4.65% during the forecast period (2024-2029).

Rising emphasis on personal care, demand for protein-based skincare and hair care products will gain prominence during the forecast period

- By application, F&B remained the largest segment in the global gelatin market. It is also anticipated to register a nominal CAGR of 4.46%, by volume, during the forecast period. This growth is primarily due to shifting preferences from traditional foods to more protein-based solutions. Globally, about 93% of consumers want to eat healthy at least a few times, with 63% trying to eat healthy most or all of the time. Consumers are also more conscious about the foods they are consuming and how the ingredients in any product affect their health. The proteins in gelatin can help support the intestinal wall, including building the protective mucus lining in the intestines.
- During the COVID-19 outbreak, in-home consumption of convenience meals increased to 26% in 2020. The importance of health as a lifestyle choice influenced consumers in the F&B sector. However, during the forecast period, personal care is expected to be the market's fastest-growing segment, with a CAGR of 6.29% by value, as gelatin has a higher average protein content of 5% than other dairy proteins.
- The only other segment with an application for gelatin is the personal care and cosmetics segment. The segment is projected to record a CAGR of 6.31%, by volume, during the forecast period. Numerous cosmetic products, such as face creams, body lotions, shampoos, hair sprays, sunscreens, bath salts, and bubble bath liquids, use gelatin as a gelling agent. It is safe for use on the skin, contains no toxic substances, and works well as a moisturizer in creams and lotions. It benefits the shine and combability of hair

and the smoothness of skin due to its film-forming properties. It also ensures that pigments in hair colors and tints are absorbed more uniformly.

Europe holds significant share in 2022 due to growing demand for dietary supplements across the region drove the application of gelatin

- Asia-Pacific is the largest and fastest-growing market for gelatin, followed by Europe. Both regions account for approximately 78.6% of the overall gelatin protein demand. The established meat industry of the Asia-Pacific region yields immense gelatin, making it easier to access the ingredient in the region. The increasing obesity in the Asia-Pacific region, particularly in countries like China and India, has also been another major factor boosting the market's growth. In India, the percentage of overweight women rose from 20.6% to 24%, while in men, the number increased from 18.9% to 22.9% in 2021. Consuming gelatin-based products as part of a balanced diet may help promote weight loss due to gelatin's high protein and low-calorie contents.
- In Europe, Russia dominated the market and accounted for 22.5% of the regional market. In 2021, gelatin sales in Russia went up by 8.18% compared to 2020, attributed to the increasing usage of bovine-based gelatin in various food and beverage applications. The rising demand for dietary supplements in the region accounts for the shifting inclination of consumers toward healthy and protein-rich diets, which is expected to drive the growth of the gelatin market.
- The African region holds a significant share of the gelatin market due to increased commercial activity, reflecting an aggressive expansion strategy in the country. High gelatin integration in the F&B industry, particularly in bakeries and beverages, drove the market. Companies are promoting their gelatin offerings as a natural fit for clear beverages, which are becoming increasingly popular among consumers. About 2-3% of gelatin is useful for removing fruit juice precipitates that may cause haze.

Global Gelatin Market Trends

Strong hold of the retail sector is supporting market growth

- Europe is the major consumer of bakery products worldwide, holding around 28.1% share in 2022. Bread is the most consumed bakery product in the region. Its production is relatively stable in most countries. However, some countries, like the United Kingdom and Germany, are still showing a long-term trend of a slow decline, i.e., 1-2% per year, thereby affecting the market's growth.
- Products with natural and clean label claims are gradually gaining popularity in North America. To consume healthier, almost 45% of American consumers seek clean-label ingredients in their products. A similar demand has sparked innovation in the local bakery industry. For instance, manufacturers like Greater Goods Snacking Co., Home Dough, and Hydrox Cookies launched clean-labeled cookies or crackers between 2016 and 2022. At the same time, other players added superfoods, protein, good fats, etc., to their portfolios.
- The bread industry experienced price inflation in 2022 as a result of the Russia-Ukraine war. In the past year, bread prices increased significantly across Europe, with the surge especially evident after Russia's invasion of Ukraine. In August 2022, prices were generally 18% higher compared to 3% in August 2021. In Italy, the average price of bread grew by 13.5% between August 2021 and August 2022. Germany also witnessed a 17.5% increase in the average price of bread during the same time.
- The organized bakery segment is projected to increase by 3.08% during the forecast period, owing to the growing demand for cookies/biscuits and pastries. Asia-Pacific is projected to witness the fastest growth rate of 4.60% during the forecast period, owing to the introduction of western bakery items by regional and international manufacturers to cater to a wider audience.

Meat production contributes majorly as raw material for gelatin manufacturers

- The gelatin industry's raw materials differ depending on the source. Animal-based gelatin uses bones, tissues, and other animal parts as raw materials, whereas marine-based gelatin uses fish as the primary raw material. As a result, companies rely significantly on raw materials from slaughterhouses and cattle, pigs, and fish farms. India had 72 government-approved abattoirs in 2017, making it one of the largest meat-producing countries globally. However, most abattoirs in India dispose of their waste, including skin, bones, and hooves. Most of the country's slaughterhouses are either very old or significantly smaller and dispersed. Therefore, abattoirs must understand the importance of hooves, hides, bones, and joints in producing gelatin, which may benefit the market economically and environmentally.
- However, the production of bovine, porcine, and fish meat declined due to the shutdown of slaughterhouses during the pandemic across all regions. Despite the COVID-19 pandemic, the EU swine sector started the year 2020 with a larger sow herd than the previous year, anticipating strong export demand from China. However, many challenging developments occurred in the market, such as slaughter restrictions in Northwestern Europe due to the COVID-19 pandemic. German pig prices are also rising despite lost Chinese sales (about 10 cents to EUR 1.54 per kg slaughter weight in May 2021).
- Countries like China are demonstrating a desire for self-sufficiency in animal protein production. For instance, in December 2021, China's National Conference of Agricultural and Rural Affairs set an annual pork production target as part of the country's five-year plan at 55 million ton, approximately 35% above the current production rate.

Gelatin Industry Overview

The Gelatin Market is fragmented, with the top five companies occupying 11.32%. The major players in this market are Darling Ingredients Inc., Gelita AG, Italgelatine SpA, Nitta Gelatin Inc. 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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