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

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Report description:

The Germany Animal Protein Market size is estimated at USD 300.95 million in 2024, and is expected to reach USD 368.86 million by 2029, growing at a CAGR of 4.15% 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

- Among end users, the F&B segment dominated the application of various animal proteins in 2022. This is majorly due to the bakery sub-segment dominating the market, with a market share of around 30% in 2022. The application of animal proteins in the bakery sector is rising, aided by pumped demand for functional bread. Local consumers are developing a strong liking for products with additional health benefits, mainly protein. Thus, users are replacing high-carb bakery goods with high-protein bakery goods. Whey protein demand in beverages is rising with the growing health awareness in the country. Ingredients, such as organic and grass-fed whey, have gained prominence due to health and ethical concerns.
- In terms of growth rate, the personal care and cosmetics segment is the second fastest-growing segment. It is projected to register a CAGR of 4.19%, by value, during the forecast period. Collagen is the most common animal protein used for personal care applications owing to its skin elasticity strengthening and hydration properties while preventing hair follicle damage and greying.
- The supplements segment held the second-largest share of the animal protein market, by value, in 2022. It was majorly dominated by the sports/performance nutrition segment, which is anticipated to drive the market with a CAGR of 6.24%, by value, in the forecast period. Rising health concerns, a higher prevalence of obesity, and the rise in fitness clubs in the country are leading to increased demand for the segment, especially in the sports nutrition category. With 11,660,000 gym members

nationwide, around 14% of the German population were gym members in 2021, driving the demand for sports nutrition supplements.

Germany Animal Protein Market Trends

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

- Germany has a huge dairy farming industry containing 4.2 million cows, valued at USD 14 billion. According to IOP Publishing, 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 a year. Germany's dairy products are largely exported (around 15% of all its exports), followed by France, New Zealand, the Netherlands, Belgium, the United States, and Denmark. The free trade policy hugely benefited Germany, providing easy exports. The country's measure of no extra tariffs makes it the largest exporter in the world.
- The highly matured food and beverage industry witnessed a massive demand for high-quality protein ingredients from the health-conscious population. The popularity of personal care and sports nutrition products increased in the country, which, in turn, increased the per capita consumption of animal protein from 47 g in 2016 to 51.8 g in 2021. The strong demand for innovation prevents private labels from growing in the market, as consumers are increasingly looking for scientific studies behind the innovation. However, skimmed milk powder is majorly used to standardize dry extract content or protein content, and it is used in products based on reconstituted milk in various applications.
- Germany is Europe's largest fitness market, where over 10 million people go to the gym. People generally prefer taking supplements like whey proteins, casein and caseinates, and dairy proteins to fulfill the body's nutrition demands. Among whey proteins, isolated whey protein dominates the market as it contains more than 90% of the protein content. Casein and caseinates are highly preferred by athletes as casein is a slow-digesting protein.

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

- The animal protein market includes distinct raw materials like milk and whey, byproducts of cheese, fish, bones, tissue, and other animal parts widely produced in the country, except for the inadequate production of marine ingredients. The manufacturers of marine-based collagen and gelatin are dependent on the imports of raw materials. The manufacturers of animal-based proteins are highly dependent on slaughterhouses, and cattle, pig, or fish farms to source raw materials. In Germany, big slaughterhouses, like Tonnies, which slaughters approximately 20,000 pigs each day, and other large slaughterhouses, like Vion, Westfleisch, and Danish Crown, widely supply to the manufacturers.
- Germany is the leading producer of milk in the European Union, accounting for more than 22% of milk deliveries in the European Union in 2020, with an output of more than 32 million tons of cow's milk. 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.
- Germany also accounted for a 22% share of the total cheese production in the EU in 2019, which accounted for 2.2 million tonne. The higher cheese production translates into significant production of its byproduct, whey, which is used to produce whey protein.

In 2019, as per the Federal Office of Agriculture and Food (BLE) data, the production of cheese in Germany inclined by 6.34% since 2016, reaching 2,581 metric ton. The considerable inclination of cheese production is attributed to a rise in the consumption and exports of cheese from Germany.

Germany Animal Protein Industry Overview

The Germany Animal Protein Market is fragmented, with the top five companies occupying 32.44%. The major players in this market are Arla Foods amba, Darling Ingredients Inc., Fonterra Co-operative Group Limited, Kerry Group PLC 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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