

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

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Report description:

The Germany Protein Market size is estimated at USD 762.64 million in 2024, and is expected to reach USD 944.14 million by 2029, growing at a CAGR of 4.36% during the forecast period (2024-2029).

Strategic investment by governing bodies drove the application of protein especially in F&B and animal feed

- By application, the food and beverage (F&B) segment is leading the German protein market. It accounted for a major share of 55.4% by volume, followed by animal feed holding a 39.9% share in 2022. However, the beverage sub-segment is anticipated to record the fastest CAGR of 7.22%, by volume, during the forecast period, as Germans are known for their preference for fizzy drinking water and fruit juices, drinks, and nectars with added proteins.
- In the F&B segment, the meat/poultry/seafood and meat alternative products sub-segment accounted for the major share by volume in 2020, followed by the dairy and dairy alternative products sub-segment. As meat alternatives record increased demand, the German government invested around USD 780,000 in 2018 in research projects such as 'Texturing Mechanisms in the Wet Extrusion of Soy and Pea Protein,' aimed at making the texture of vegan meat more 'realistic' with the use of soy and pea proteins.
- The market growth is primarily driven by the rising number of vegan and flexitarian consumers increasingly relying on or being open-to animal-free product offerings. As of 2020, the number of vegans in Germany had doubled from 1.3 million to 2.6 million, representing 3.2% of the population.
- The sports/performance nutrition supplement sub-segment is projected to be the fastest-growing end-user application with a CAGR value of 6.28% during the forecast period 2023-2029. For instance, according to the global health and fitness association IHRSA, since 2016, the number of fitness club members in Germany increased by 14% to reach 64.76 million in 2019. In 2021,

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North Rhine-Westphalia had the most sports clubs among German states, numbering around 18,000, followed by Bavaria with 11,725 and Baden-Württemberg with 11,274.

Germany 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.

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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 Protein Industry Overview

The Germany Protein Market is fragmented, with the top five companies occupying 24.05%. The major players in this market are Archer Daniels Midland Company, Arla Foods AmbA, Darling Ingredients 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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