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

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Report description:

The India Animal Protein Market size is estimated at USD 486.39 million in 2024, and is expected to reach USD 666.84 million by 2029, growing at a CAGR of 6.51% during the forecast period (2024-2029).

Consumer inclination towards protein-based meals dominates the F&B sector across the country

- By end user, the F&B sector remained the largest, and it is anticipated to register a CAGR of 6.33%, by volume, in the forecast period. The demand was majorly led by the snacks industry owing to the increasing number of working professionals and their widening inclination toward healthy, on-the-go meal options. About 70% of Indians are willing to focus on improving their overall health and immunity and reducing stress and anxiety by prioritizing dietary changes.
- The COVID-19 pandemic exposed the vulnerability of the regional foodservice sector, which further drove consumers toward the retail sector. This trend largely benefitted the RTE/RTC foods sub-segment, which saw double-digit growth of 19.60% by volume in 2020 compared to the previous year. The pandemic further bolstered the demand for ready-to-cook food products, such as frozen meals and pizzas, directly positioned to compensate for consumers' eating out. The demand for protein is expected to continue due to the growing consumption of ready-to-eat foods in the country. Thus, the RTE/RTC foods sub-segment is projected to record a CAGR of 6.71% during the forecast period.
- The personal care and cosmetics segment is expected to grow the fastest and record a CAGR of 9.59% during the forecast period. The need for all-natural components in the Indian cosmetics sector is driving applications of animal protein. The increasing functions of whey protein, such as skin smoothening and hair conditioning, are also boosting demand in the market. With the rise in demand for bioactive ingredients from Indian consumers, manufacturers are attempting to include these ingredients in the sector.

India Animal Protein Market Trends

Increase in per capita animal protein to create favorable environment for whey protein and collagen suppliers

- The country's food sector has tripled in the past decade and is expected to follow the same trend over the coming years. Functional foods and beverages and protein products are becoming widely popular due to their health benefits. The demand for personal care products containing whey protein has also increased in the region. In 2020, the market value of protein supplements in India was USD 187. Due to the strong awareness of fitness in the country, the demand for whey protein powder among bodybuilders and young Indians is increasing.
- The market is driven by factors such as an inclination toward beauty and health supplements and increased R&D activities. The spectrum of applications of collagen is broad, primarily from leading pharmaceutical and biotechnological companies that incorporate collagen-based products for better drug delivery systems. In 2019, nearly 37% of the population preferred supplements, primarily for their beauty advantages. Byproducts like collagen are produced using the carcasses of pork (11%), beef (15%), and lamb (16%) containing bone. However, there is a strong preference for natural and ayurvedic products, which is boosting the market for plant-based products like vegan collagen. The vegan collagen market could eventually compete with the market for animal-derived collagen.
- In 2020, the yield of animal byproducts ranged between 50% and 60% of the live weight. Hides and skins are typically among the most valuable animal byproducts that produce end products like edible gelatin. The weight of the hides ranges from 4% to 11% of the live animal's weight. Increased usage of gelatin as a viable biodegradable food packaging material and a boost in fortified confectionery and sports nutrition products may lead to new prospects for India during the forecast period.

Production of milk in India is projected to grow significantly

- India is the world's leading producer of milk, which is used in the manufacture of animal protein. India's milk production rose by 55.79% in 2019-2020 compared to the last nine years. Due to the COVID-19 impact, overall animal protein production declined by 2% in the past two years. However, the production of milk in India is projected to grow significantly, supported by distinct government initiatives to increase livestock productivity. Both cow and buffalo milk output increased throughout the country. For instance, in 2014, India produced 146 million ton of milk. Currently, this number has reached 210 million ton, a 44% increase from 2014 to 2022, recording a Y-o-Y production growth rate of more than 6%.
- Animal proteins, such as whey, are widely generated in India as a byproduct of chickpea, paneer, and cheese, whose production is continuously increasing. However, much of the cheese market remains untapped, implying that the production of cheese and its byproducts have huge growth potential in India.
- Gelatin and collagen-producing industries rely heavily on slaughterhouses and cattle, pig, and fish farms for their raw materials. In 2022, the country had 63 government-approved abattoirs, becoming one of the world's largest meat producers. However, most abattoirs in India dispose of their waste, including skin, bones, and hooves, posing a significant difficulty for the animal protein industry. Government initiatives and the construction of new modern slaughterhouses across the country are helping boost the industry. Similarly, raw materials are supplied to the country's marine-based food makers by the marine industries, which are

primarily based in West Bengal.

India Animal Protein Industry Overview

The India Animal Protein Market is fragmented, with the top five companies occupying 6.29%. The major players in this market are Fonterra Co-operative Group Limited, Glanbia PLC, Hilmar Cheese Company Inc., Kerry Group PLC and Nakoda Dairy Private Limited (sorted alphabetically).

Additional Benefits:

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

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