

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

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Report description:

The India Protein Market size is estimated at USD 1.40 billion in 2024, and is expected to reach USD 1.88 billion by 2029, growing at a CAGR of 6.07% during the forecast period (2024-2029).

Increasing awareness of protein functionalities and growing consumer knowledge resulted with increasing segmental revenue

- The food and beverage segment led protein applications in the region, accounting for a major volume share. The segment is further projected to record a CAGR value of 6.38% during the forecast period. The demand for protein in the food and beverage segment is primarily driven by the increasing demand for protein functionalities and awareness about protein-rich diets. The meat/poultry/seafood and meat alternatives products sub-segment accounted for a major volume share of 31.47%, followed by the dairy and dairy alternative products segment, with 23.2%, in 2022.

- Applications in the baby food and infant formula sub-segment are likely to outpace others, with a projected CAGR value of 8.74% during the forecast period. The rising public awareness of children's nutrition and ideal development can be linked to the expansion of baby food items, which are popular among consumers to give infants and young children extra vitamins to boost their immunity and overall health. The Indian government launched the National Health Mission with the aim to make healthcare affordable and accessible to everyone, aligning with the United Nations' Sustainable Development Goal 3 (Good Health and Well-Being).

- The supplements segment is mainly driven by sports/performance nutrition, projected to record a CAGR value of 4.51% during the forecast period, attributed to the rising consumer engagement in sports and physical activities. Around two lakh new gyms have been opened in the past two years, supported by increasing interest in sports leagues, such as the Chinese Super League and Indian Premier League, which provide a solid platform for the development of sports nutrition and associated ingredients

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markets.

India 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

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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 Protein Industry Overview

The India Protein Market is fragmented, with the top five companies occupying 8.30%. The major players in this market are Archer Daniels Midland Company, Fonterra Co-operative Group Limited, International Flavors & Fragrances, Inc., Sudzucker AG and VIPPY INDUSTRIES LIMITED (sorted alphabetically).

Additional Benefits:

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

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