

## **Middle East Animal Protein - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2017 - 2029**

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### **Report description:**

The Middle East Animal Protein Market size is estimated at USD 580 million in 2024, and is expected to reach USD 782.06 million by 2029, growing at a CAGR of 6.16% during the forecast period (2024-2029).

Dominant demand for protein fortified food and beverages and anticipated revenue from personal care and cosmetic products lead the segmental growth

- The animal protein market is largely driven by the food and beverage sector. Consumers in the region are trying to consider the health factors when consuming every product, thus driving the use of animal proteins such as whey proteins, casein and caseinates, and milk proteins. Food and beverage demand is majorly driven by the bakery segment on a value basis, with a share of 42% in 2022. This segment has immense applications of animal proteins such as casein and caseinates, gelatin, collagen, and other milk and whey proteins. It is majorly dominated by gelatin, with a share of 57.18%, by value, in 2022.
- The supplements segment is also one of the major segments in the market, registering a growth of 6%, by volume, from 2018 to 2022. The segment's growth is primarily due to the rising obesity across the region. For instance, around 70% of men over the age of 15 and 67% of women in the United Arab Emirates were obese in 2021. The sectoral growth is largely driven by the baby food and infant nutrition sub-segment, which is anticipated to register a CAGR of 6.63%, by value, during the forecast period.
- However, the animal protein-enriched personal care and cosmetics segment is projected to witness a CAGR of 7.39%, by value, during the forecast period, owing to the increasing applicability of proteins such as keratin, elastin, and whey protein in the segment. For instance, whey protein is used as a skin-smoothing and hair-conditioning agent. High protein collagen peptide energy and beauty drinks are also gaining immense popularity in the United Arab Emirates, Tunisia, and Algeria, as they are often seen as substitutes for leisure drinks due to their 20% high caffeine content.

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Countries like Saudi Arabia, Iran drive the segmental revenue with growing demand for meat alternatives in the region

- Saudi Arabia primarily led the market in 2022. In the country, by protein type, milk protein dominates the market with the highest demand for milk protein-based functional foods and beverages, with a market share of 66.3% by value in 2022. This increased demand was primarily because prices of dairy products (which include dairy ingredients like dairy proteins) in Saudi Arabia rose by 30-50% following the Kingdom's Cabinet decision to remove subsidies on them in 2021, leaving consumers in importing countries like Bahrain paying more for dairy products.
- However, during the forecast period, Iran is projected to witness the highest growth potential for animal proteins, particularly gelatin and collagen, with a CAGR of 8.71%, owing to the rising demand for meat alternatives in the country. For instance, per capita meat consumption in Iran fell by 50% in 2021 to an average of just 2.9 kg a year, leaving immense scope for the consumption of meat alternatives, thus driving the use of animal protein-fortified foods.
- The Rest of the Middle East segment emerged as the largest geographical segment in 2022 after Saudi Arabia, with countries like Qatar expanding dairy output to attain self-sufficiency. The processing sector, notably dairy protein, stands to benefit. As a result, players are gradually purchasing smaller businesses or investing in their manufacturing lines to extend their supply capabilities. In 2019, for example, NZMP promoted its dairy component line by showcasing high-protein solutions to address the diverse needs of the region's enterprises. In 2022, Arla Foods invested USD 63 million to expand its production in Bahrain, the largest sum for the company outside Europe.

#### Middle East Animal Protein Market Trends

Inclination towards protein rich diet to support growing consumption

- The Iranian dairy industry is the largest in the Middle East. In 2014, dairy consumption per capita was 60 kg, which was extremely low and half the world's average. Saudi Arabia is the biggest dairy market, holding more than 70% of the market share in the Middle East. The key factors driving the growth of the animal protein market in the region are the rising demand for dairy ingredients, consumer awareness of a healthy diet, and the keen interest of youngsters in sports and nutrition. Flavors, nutritional values, ease of carrying, and perishable nature are making whey snacks a popular choice for millennials looking for quick snack options for full meals and older people looking for a protein-rich diet.
- The growing number of fitness clubs and gyms with personal training and the latest fitness equipment is attracting consumers to these clubs. Consumers are spending more on their fitness due to high disposable income in the region. Around 70% of men over the age of 15 and 67% of women in the United Arab Emirates are obese. Thus, sports nutrition accounted for 70% of consumption, primarily due to the rising obesity across the region.
- Among the Middle Eastern countries, the United Arab Emirates recorded the highest consumption of and demand for collagen-based functional food and beverages. High-protein collagen peptide energy and beauty drinks are gaining popularity in the United Arab Emirates, Tunisia, and Algeria, as they are often seen as substitutes for leisure drinks due to their high caffeine content. The country imports collagen from Japan and Australia, with a high import rate of sheep-based collagen. The marine-based products are priced heavily at USD 46.3 per kg, which is around 30-35% more than gelatin.

GCC countries to focus more on increasing production capabilities of milk and meat

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- The production of animal proteins is less compared to other types. The raw material used for animal protein manufacturing is milk, which is produced in the least amount in the region. The United Arab Emirates produced 164,934 TT of milk in 2020. The country's milk production increased significantly between 1971 and 2020, rising from 17,550 TT to 164,934 TT, with an increasing annual rate that peaked in 2009, at 22.05%, before declining to 1.06% in 2020. However, harsh climatic conditions and the infancy of cold chain technology in the region are some restraining factors for the segment.

- Besides leveraging the latest advancements in dairy farming technology, key herd and farm management techniques are also critical to overcoming these barriers. The lowest prices on dairy products are secured when large volumes are ordered. However, African buyers usually only place these large orders while asking for generous extended credit terms since they lack the up-front capital. The growth rate of animal protein increased by 10% in 2020 compared to 2016. Other animal proteins, such as collagen and gelatin, are manufactured using meat and marine industry waste. However, the reputation of slaughterhouses in the Middle East is poor among animal welfare campaigners in the region.

- Live animal exports to the Middle East have risen steadily over the past two decades, particularly from Europe and Australia. In 2019, Western Australia exported 1.0 million live sheep to nine countries, mostly in the Middle East, worth AUD 136 million. The three largest markets by volume were Kuwait (35%), Qatar (25%), and Jordan (19%), mainly due to the rising demand for meat and dairy products and the rapidly warming climate pressuring the water-stressed nations.

## Middle East Animal Protein Industry Overview

The Middle East Animal Protein Market is fragmented, with the top five companies occupying 7.64%. The major players in this market are Hilmar Cheese Company Inc., Kerry Group PLC, MEGGLE GmbH & Co. KG, Ornuia Co-operative Limited and Royal FrieslandCampina NV (sorted alphabetically).

### Additional Benefits:

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

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