

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

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Report description:

The Middle East Protein Market size is estimated at USD 1.37 billion in 2024, and is expected to reach USD 1.84 billion by 2029, growing at a CAGR of 6.08% during the forecast period (2024-2029).

Rising number of vegan and flexitarian consumers in the Middle East has resulted in an increased market share of food and beverages segment in the region

- The food and beverage segment led the application of proteins in the region, accounting for a major volume share. The share was highly influenced by the dairy, meat-alternative, and bakery industries, which accounted for 42% of the value share of the overall proteins consumed in the Middle East in 2022. The share is primarily driven by the rising number of vegan and flexitarian consumers who increasingly rely on or are open to animal-free product offerings in the market.
- This segment is followed by the animal feed segment, which is largely driven by the application of plant proteins. The inclusion of sustainable plant protein sources, mainly soy and wheat proteins, highly drives the segment due to their low cost, excellent digestibility, and neutral flavor profile. Hence, pea protein has opportunities for wide applications in animal feed and is anticipated to be the fastest-growing protein type in the animal feed segment, with a CAGR of 8.8% by volume during the forecast period.
- The personal care and cosmetics segment is the fastest-growing, with a projected CAGR of 7.12% by value during the forecast period. Proteins are used in a range of cosmetics products, including emulsions, gels, shampoos, conditioners, and creams. Proteins such as collagen, elastin, and keratin are also gaining popularity due to their higher efficacy in naturally strengthening the skin and hair texture. Companies like Estee Lauder, Neu Cosmetics DMCC, and Guerlain are increasingly investing in R&D to develop more effective and sustainable alternative protein sources. This factor is further boosting the ingredient scope and application in personal care products, which may aid the growth of the market in the future.

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With more than half of its population looking to consume protein supplements, Saudi Arabia registered the maximum market share in the region's protein market

- One of the region's most important dietary and consumer trends is the shift toward plant-based, flexitarian, or redudetararian diets. This has resulted in the highest share of plant proteins. Plant proteins accounted for an applicational volume of 82% in 2022.
- Saudi Arabia led the market in 2022. The food and beverage and animal feed segments held volume shares of 52% and 41%, respectively, in 2022, largely contributing to the market growth. This was due to Saudi Arabia's high level of product integration and fiercely competitive environment. Companies are strengthening their domestic presence by acquiring small businesses, thereby expanding their protein production units and product portfolios.
- The rise in active lifestyles in Saudi Arabia is anticipated to increase protein consumption. In 2021, 48.2% of people across Saudi Arabia engaged in physical and sporting activities for at least 30 minutes per day. The consumption of protein in Saudi Arabia accounted for a volume of 8,234.4 tons in 2022. About 50% of physically active people consumed protein supplements in 2020. About 56.1% of active people consume protein supplements to gain muscles, followed by 28.6% of people using protein supplements to compensate for protein deficiency.
- Iran is the second-largest consumer of protein. Iran is projected to register the fastest CAGR of 8.4% in terms of volume during the forecast period. Plant protein dominated the Iranian market, driven by the demand from the food and beverage and animal feed sectors.
- The United Arab Emirates is another key protein market in the region, led by soy protein. Soy protein accounted for 55.90% of the value share of the UAE protein market in 2022. Soy protein is primarily driven by the animal feed and food and beverage industries.

Middle East 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.

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

- 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 Protein Industry Overview

The Middle East Protein Market is fragmented, with the top five companies occupying 17.13%. The major players in this market are Cargill, Incorporated, Fonterra Co-operative Group Limited, International Flavors & Fragrances Inc., Kerry Group PLC 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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