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

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Report description:

The North America Animal Protein Market size is estimated at USD 2.44 billion in 2024, and is expected to reach USD 3.07 billion by 2029, growing at a CAGR of 4.70% during the forecast period (2024-2029).

Supplements segment holds significant share with growing health conscious consumer across the region, the segment will register y-o-y growth of 4.92% from 2023-2024

- The F&B end-user segment, particularly the snacks sub-segment, drives the market and is expected to register a CAGR of 3.10% by value during the forecast period. Consumer preference for animal protein, in particular, is growing owing to its high nutritional value and functional qualities like foaming, emulsification, gelling, etc., which are sought after by all F&B sub-segments. In 2021, one in four US consumers said that "rich in protein" is a very important quality when choosing which snacks to eat, indicating the high demand for protein snacks. This holds for millennial consumers in particular. Consumers are looking for protein snacks for various reasons, including comfort, energy, muscle support, weight loss, and healthy aging.
- The supplements segment, aided by the sports and performance nutrition sub-segment, is the fastest-growing sub-segment and is expected to record a CAGR of 6.47% by value during the forecast period. This is supported by the growing number of consumers using animal protein to enhance their activities at gyms and fitness centers. Whey protein is the most commonly used animal protein in sports and performance nutrition products. Whey protein contains branched-chain amino acids, a type of amino acid that aids in muscle development.
- On the other hand, infant foods struggled to gain market share over the review period, owing to the prominence of plant protein in the sub-segment, which stemmed from newborns' lactose intolerance and weaker digestive systems. In the United States, about 2.5% of children under the age of three were allergic to milk in 2021, which was a setback for the market.

United states accounted for majority of the share in 2022 due to strong consumption of animal-based meat and dairy products

- Among countries in North America, the United States accounted for the largest market share in 2022 due to the high per capita consumption of animal proteins, especially dairy proteins, which increased from 75.06 to 76.22 g/capita/day in 2018-2019. However, the United States recorded a reduced Y-o-Y growth rate of 1.54% by volume in 2020-2021 due to decreased protein demand from the sports supplement industry. This decrease was attributed to consumers' halted fitness regimes and reduced dependence on protein supplements, resulting in a -3.34% decline in animal protein consumption through the sports nutrition sub-segment.
- The Y-o-Y growth rate of the F&B segment inclined to 1.18% by value in 2022 due to the US food price index for meat, poultry, and fish, which increased by 4.3%, and the cereal and bakery index that increased by 2.9% in 2021.
- However, during the forecast period, Mexico is projected to record the highest CAGR of 5.94% by value, primarily driven by the F&B sector. Government support through initiatives such as the Canada-United States-Mexico Agreement (CUSMA), which went into effect on July 1, 2020, to promote trade, lower tariffs, and increase economic growth, has significantly boosted the animal protein market growth.
- However, Canada accounts for the second-largest market share, observing a significant growth of around 15% by volume from 2016 to 2022. Due to the high domestic production in the country, about 72,360 ton of processed cheese were produced in Canada in 2020, up from 65,320 ton in 2019. Insect proteins are gaining popularity in the animal feed segment and observed the highest Y-o-Y growth rate during the entire review period of 7.90% in 2021 due to their low prices, estimated to reach USD 5.9 per kg in 2022.

North America Animal Protein Market Trends

Animal protein consumption growth fuels opportunities for key players in the ingredients sector

- The per capita milk protein consumption increased in the United States from 2017 to 2022. Milk protein consumption in the United States increased from 73.9 g to 79.7 g/capita/day in 2017-2022. The US dairy industry has been innovating and launching new products in line with customer requirements. US dairy suppliers continue to enhance their technology, including the filtration process followed by spray drying. They also invest to meet buyers' quality and sensory specifications consistently. The application of milk proteins in snacks led the market in 2020. The rise in snacking by 10-20% in 2020 contributed to the segment's growth during the COVID-19 pandemic.
- The dairy industry ranks second in the Canadian agricultural sector, followed by red meat. The dairy industry operates mainly through the supply management system based on planned domestic, administered pricing, and dairy import controls. Along with this, Canadian milk and dairy products are known for their high quality because of the strict quality standards followed on dairy farms and during processing in line with strong animal welfare practices and environmental sustainability. According to the Canadian Dairy Information Center, in 2020, Canada produced around 93.51 million hl, and the largest processors in Canada are Saputo, Agropur, and Lactalis.
- Along with the United States, Canada has among the highest obesity rates in the world. As of June 2022, about 25% of Canadian adults were considered obese, and the prevalence surpasses 30% for those aged between 40 and 69. In order to counter this, people are exploring ways to stay fit and opting for healthy lifestyles. Proteins are the most preferred supplement consumed for weight loss and sports nourishment.

Meat and milk production contributes majorly as raw material for animal protein ingredients

- The United States dominates the production of animal proteins, such as casein, in the North American region. However, it could be necessary to charge an additional roughly USD 2.40 per pound to persuade domestic factories to switch from using fluid skim milk to non-fat dry milk to casein. As imported casein is being marketed in the United States at about 90 cents per pound, domestic skim milk supplies cannot be converted to casein and compete with imported casein at the current price levels. Hence, casein is not being produced much currently in the United States, regardless of the demand. In 2019, the United States imported USD 441 million worth of casein from New Zealand, Ireland, the Netherlands, France, and Poland, becoming the world's largest importer. However, by May 2021, casein's Y-o-Y imports decreased primarily due to the decrease in imports from the Netherlands (-39.8%) and Uganda (-81.3%).
- The United States also dominates the production of collagen and gelatin proteins, majorly driven by the slaughterhouse supply. Bovine meat production in North America increased by 0.32% in 2019, owing to the increased bovine production in Canada (2.38%). However, porcine meat production dropped in 2020 by -2.42%, owing to the drop in production in the United States and Canada by -1.87% and -5.52%, respectively.
- In the dairy industry, there has been an increase in Canadian dairy product manufacturers using other milk products, including milk solids, to manufacture cheese, skim milk powder, and whey and milk protein concentrate. The total milk production in the region was expected to increase by 10.095 ton in 2020, recording a 1% increase over the previous year. Moreover, the increased milk production is anticipated to meet additional demand from many Ontario processing facilities.

North America Animal Protein Industry Overview

The North America Animal Protein Market is fragmented, with the top five companies occupying 22.58%. The major players in this market are Ajinomoto Co. Inc., Arla Foods amba, Darling Ingredients Inc., Glanbia PLC and Kerry Group PLC (sorted alphabetically).

Additional Benefits:

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

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