

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

Market Report | 2024-02-17 | 332 pages | Mordor Intelligence

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Report description:

The North America Protein Market size is estimated at USD 7.5 billion in 2024, and is expected to reach USD 9.23 billion by 2029, growing at a CAGR of 4.24% during the forecast period (2024-2029).

Food and Beverages sector dominates due to strong demand from dairy & dairy alternatives and supplements

- The F&B sector dominates the end-user market, due to the growing need for whey, wheat, and pea protein in F&B products. Because of the extensive use of soy-based plant protein, the dairy and meat alternatives market continued to hold the leading position. Together, the two sub-segments made up 61.3% of the total volume of the F&B segment in the region in 2022. Since soy can replicate muscle texture when stacked into linear fibers, soy protein leads the protein market. This boosts its use for high-moisture extrusion, gelling, and protein fortification. To produce the requisite anisotropic product structure, these meat analogs are extruded at high moisture contents (>40%) and elevated temperatures above 100 C.
- Animal feed is the second-largest segment, where insect protein dominates and holds 53.8% of the market volume. The market potential for animal feed is further expanded by the introduction of sustainable alternative protein sources like insect protein. To provide a cost-effective and efficient source of feed-grade protein, companies like Darling Ingredients, Aspire Food Group, and Enterra Corporation are expanding their manufacturing capacities in the region.
- Personal care and cosmetics is the fastest-growing segment, and it is projected to register a CAGR of 6.48% by value during the forecast period. In the United States, 6.8 million people suffer from hair problems such as alopecia areata. Collagen peptides, which are the hydrolyzed form of collagen, nourish the hair bulbs and strengthen the hair follicles by fostering the ideal conditions for healthy hair growth. OGX Biotin & Collagen Shampoo, Salcoll Collagen Hair Mist, Hair La Vie Foundation Collagen Elixir, etc. are a few examples of hair care products containing collagen.

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United states holds majority of share in 2022 due to strong presence of various food manufacturing units

- The overall North American protein market witnessed a favorable growth rate of 9.09% in terms of sales value in 2020. The United States led the market in 2020 due to high production consolidation in the country and an active competitive landscape. Companies are strengthening their presence in the country by acquiring small firms, ramping up protein production units, and expanding their product portfolios. Companies such as Agropur, Anchor Ingredients, and Hilmar Cheese boosted their production capabilities over the review period. Thus, constant product developments and differentiation in the market further resulted in additional sales by volume.
- Canada remained the second-largest market in 2022, driven by consumers pushing for diversification of protein sources. Animal proteins are being replaced by new functional foods and value-added products that are being created by the booming plant-protein industry. In 2022, more than 40% of people in Canada actively strive to increase their consumption of plant-based foods. The popularity of plant-based protein sources recently increased due to their suitability for vegetarian, vegan, and "flexitarian" lifestyles.
- Mexico is likely to be the fastest-growing region, with a projected volume CAGR of 6.46% during the forecast period. The Mexican market is dominated by the demand for plant proteins in the country, and it is anticipated to register a CAGR of 6.67%, by value, during the forecast period. Due to the rising awareness among Mexican consumers about food safety, environmental sustainability, and animal welfare aspects of meat, a shift from animal protein products to plant-based protein products was observed among a significant portion of the country.

North America 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.

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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 Protein Industry Overview

The North America Protein Market is fragmented, with the top five companies occupying 38.59%. The major players in this market are Archer Daniels Midland Company, Bunge Limited, CHS Inc., International Flavors & Fragrances, Inc. and Kerry Group PLC (sorted alphabetically).

Additional Benefits:

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

Table of Contents:

1 EXECUTIVE SUMMARY & KEY FINDINGS

2 INTRODUCTION

2.1 Study Assumptions & Market Definition

2.2 Scope of the Study?

2.3 Research Methodology

3 KEY INDUSTRY TRENDS

3.1 End User Market Volume

3.1.1 Baby Food and Infant Formula

3.1.2 Bakery

3.1.3 Beverages

3.1.4 Breakfast Cereals

3.1.5 Condiments/Sauces

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- 3.1.6 Confectionery
- 3.1.7 Dairy and Dairy Alternative Products
- 3.1.8 Elderly Nutrition and Medical Nutrition
- 3.1.9 Meat/Poultry/Seafood and Meat Alternative Products
- 3.1.10 RTE/RTC Food Products
- 3.1.11 Snacks
- 3.1.12 Sport/Performance Nutrition
- 3.1.13 Animal Feed
- 3.1.14 Personal Care and Cosmetics
- 3.2 Protein Consumption Trends
 - 3.2.1 Animal
 - 3.2.2 Plant
- 3.3 Production Trends
 - 3.3.1 Animal
 - 3.3.2 Plant
- 3.4 Regulatory Framework
 - 3.4.1 Canada
 - 3.4.2 United States
- 3.5 Value Chain & Distribution Channel Analysis

4 MARKET SEGMENTATION (includes market size in Value in USD and Volume, Forecasts up to 2029 and analysis of growth prospects)

- 4.1 Source
 - 4.1.1 Animal
 - 4.1.1.1 By Protein Type
 - 4.1.1.1.1 Casein and Caseinates
 - 4.1.1.1.2 Collagen
 - 4.1.1.1.3 Egg Protein
 - 4.1.1.1.4 Gelatin
 - 4.1.1.1.5 Insect Protein
 - 4.1.1.1.6 Milk Protein
 - 4.1.1.1.7 Whey Protein
 - 4.1.1.1.8 Other Animal Protein
 - 4.1.2 Microbial
 - 4.1.2.1 By Protein Type
 - 4.1.2.1.1 Algae Protein
 - 4.1.2.1.2 Mycoprotein
 - 4.1.3 Plant
 - 4.1.3.1 By Protein Type
 - 4.1.3.1.1 Hemp Protein
 - 4.1.3.1.2 Pea Protein
 - 4.1.3.1.3 Potato Protein
 - 4.1.3.1.4 Rice Protein
 - 4.1.3.1.5 Soy Protein
 - 4.1.3.1.6 Wheat Protein
 - 4.1.3.1.7 Other Plant Protein
 - 4.2 End User

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- 4.2.1 Animal Feed
- 4.2.2 Food and Beverages
 - 4.2.2.1 By Sub End User
 - 4.2.2.1.1 Bakery
 - 4.2.2.1.2 Beverages
 - 4.2.2.1.3 Breakfast Cereals
 - 4.2.2.1.4 Condiments/Sauces
 - 4.2.2.1.5 Confectionery
 - 4.2.2.1.6 Dairy and Dairy Alternative Products
 - 4.2.2.1.7 Meat/Poultry/Seafood and Meat Alternative Products
 - 4.2.2.1.8 RTE/RTC Food Products
 - 4.2.2.1.9 Snacks
 - 4.2.3 Personal Care and Cosmetics
 - 4.2.4 Supplements
 - 4.2.4.1 By Sub End User
 - 4.2.4.1.1 Baby Food and Infant Formula
 - 4.2.4.1.2 Elderly Nutrition and Medical Nutrition
 - 4.2.4.1.3 Sport/Performance Nutrition
- 4.3 Country
 - 4.3.1 Canada
 - 4.3.2 Mexico
 - 4.3.3 United States
 - 4.3.4 Rest of North America

5 COMPETITIVE LANDSCAPE

- 5.1 Key Strategic Moves
- 5.2 Market Share Analysis
- 5.3 Company Landscape
- 5.4 Company Profiles (includes Global Level Overview, Market Level Overview, Core Business Segments, Financials, Headcount, Key Information, Market Rank, Market Share, Products and Services, and Analysis of Recent Developments).
 - 5.4.1 Agropur Dairy Cooperative
 - 5.4.2 Archer Daniels Midland Company
 - 5.4.3 Arla Foods amba
 - 5.4.4 Bunge Limited
 - 5.4.5 CHS Inc.
 - 5.4.6 Darling Ingredients Inc.
 - 5.4.7 Farbest-Tallman Foods Corporation
 - 5.4.8 Fonterra Co-operative Group Limited
 - 5.4.9 Gelita AG
 - 5.4.10 Glanbia PLC
 - 5.4.11 Groupe Lactalis
 - 5.4.12 International Flavors & Fragrances, Inc.
 - 5.4.13 Kerry Group PLC
 - 5.4.14 MGP
 - 5.4.15 Milk Specialties Global
 - 5.4.16 Roquette Freres
 - 5.4.17 Sudzucker Group

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- 5.4.18 Tessenderlo Group
- 5.4.19 The Scoular Company

6 KEY STRATEGIC QUESTIONS FOR PROTEIN INGREDIENTS INDUSTRY CEOS

7 APPENDIX

- 7.1 Global Overview
 - 7.1.1 Overview
 - 7.1.2 Porter's Five Forces Framework
 - 7.1.3 Global Value Chain Analysis
 - 7.1.4 Market Dynamics (DROs)
- 7.2 Sources & References
- 7.3 List of Tables & Figures
- 7.4 Primary Insights
- 7.5 Data Pack
- 7.6 Glossary of Terms

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