

United States Animal Protein - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2017 - 2029

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Report description:

The United States Animal Protein Market size is estimated at USD 1.95 billion in 2024, and is expected to reach USD 2.44 billion by 2029, growing at a CAGR of 4.59% during the forecast period (2024-2029).

Rising health concerns in the country influence the use of high-protein ingredients in various segments

- The F&B segment, majorly the snacks sub-segment, dominated the market in terms of growth rate, and it is expected to register a CAGR of 2.28%, by value, during the forecast period. Animal protein, in particular, is becoming more and more popular with consumers, impacting all food and beverage sectors. The demand for protein snacks is particularly strong, with 1 in 4 US consumers indicating "high in protein" as a very important attribute in 2022 when deciding which snacks to consume, which is especially true for millennial consumers. Consumers seek protein snacks for various reasons, including satiety, energy, muscle support, weight loss, healthy aging, and general nutrition.

- The supplement segment is the major segment in the market after F&B, and it is expected to record a CAGR of 5.55%, by value, during the forecast period. By supplement type, sports nutrition saw the highest demand due to its functionalities like growth, repair, and strengthening of muscular tissue. In the United States, 36.5% of adults are obese, and 32.5% are overweight. More than two-thirds of adults in the United States were overweight or obese in 2021. Around 45 million adults (approximately 14% of the population) had a gym membership or fitness center membership in 2021. Rising health concerns, higher obesity prevalence, and a rise in health clubs led to increased demand for these products.

- The Y-o-Y growth rate of the F&B segment increased to 0.68%, by value, in 2021. It was mainly due to the US food price index for meat, poultry, and fish, which increased by 4.3%, and the cereal and bakery index increased by 2.9% in 2021.

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United States Animal Protein Market Trends

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

- Despite the rising vegan population, the demand for animal protein has been steady in the United States. The majority of protein in the American diet comes from beef and poultry, followed by dairy. The market is majorly driven by the growing usage of gelatin in the functional food industry due to its water-binding properties. However, growing veganism and demand for plant-based products are the major restraints in the growth of the food gelatin market. A significant share of the country is vegetarian, and those switching to a vegan diet are likely to avoid animal-based protein ingredients, such as gelatin. However, several plant-based ingredients act as a direct substitute for gelatin.
- With a wide range of applications and consumer preferences toward a healthy lifestyle, many US ingredient manufacturers are trying to enter the collagen market, which is the major reason for the increase in per capita consumption patterns. In 2021, around 25% of all adults, or 58 million people, were diagnosed with severe joint pain in the country, which is linked to arthritis. Owing to the prevalence of arthritis in the region, there is an increasing demand for collagen-based supplements for bone and joint health.
- Over the years, considerable research has proven that animal protein has a higher biological value than plant protein. In the Protein Digestibility-corrected Amino Acid Score proposed by the Food and Agricultural Organization, both milk and whey protein are scored 1, indicating that the protein will provide 100% (or more) of all the amino acids required in the diet. On the contrary, plant sources lack one or more amino acids, with delayed digestibility. This factor is driving athletes and fitness enthusiasts to consume animal-based protein.

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

- Whey and casein production is mainly driven by the supply from cheese production plants, which are the two major byproducts of cheese. However, in the case of caseins/caseinates, a price of about USD 2.40 per pound is necessary to induce domestic plants to divert fluid skim milk from the production of non-fat dry milk to the production of caseins. Inasmauch's imported casein is being marketed in the United States at about 90 cents per pound, and domestic supplies of skim milk cannot be converted to casein and compete with imported casein at the current level of prices. Hence, casein is not currently much under production in the United States, regardless of the demand.
- In 2020, milk production declined due to the COVID-19 pandemic as production plants shut down operations nationwide. However, milk plants witnessed a surge due to panic buying, which settled down after April 2020. In 2020, 16.3% of total US milk solids production was exported. More than 33% of total milk solids imported into the United States during the first 10 months of 2020 were in the form of concentrated milk proteins, including casein, milk protein concentrate, whey protein concentrate, milk protein isolate, and whey protein isolate.
- The production of gelatin proteins significantly dominated the market in the country. This production is maintained by the supply from the meat industry plants, especially from the animal industry (cattle, pig, and fish meat). In 2019, the United States imported USD 292 million worth of gelatin, becoming the first-largest importer of gelatin in the world. However, in May 2021, Y-o-Y imports of gelatins decreased significantly, primarily due to a fall in imports from Canada (-26.2%) and Slovakia (-95.9%).

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United States Animal Protein Industry Overview

The United States Animal Protein Market is fragmented, with the top five companies occupying 24.21%. The major players in this market are Arla Foods amba, Darling Ingredients Inc., Fonterra Co-operative Group Limited, 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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