

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

Market Report | 2024-02-17 | 313 pages | Mordor Intelligence

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Report description:

The United States Protein Market size is estimated at USD 6.16 billion in 2024, and is expected to reach USD 7.48 billion by 2029, growing at a CAGR of 3.96% during the forecast period (2024-2029).

Sustainable alternative protein sources are boosting the market demand with application mostly through food and beverages sector

- By application, the food and beverage segment led the applications for proteins in the country, accounting for a major volume share. The share was highly influenced by the dairy- and meat-alternative sub-segments that accounted for 35% of the overall proteins consumed in the country in 2022. The share was 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.
- It was followed by the animal feed segment, largely driven by the application of animal proteins. The inclusion of sustainable alternative protein sources, such as insect protein, further increases the market scope in animal feed. Companies like Enterra Corporation and Darling Ingredients are boosting their production capabilities to offer a cost-effective and efficient source of feed-grade protein. As a result, with a volume CAGR of 1.52%, insect protein remained one of the fastest-growing protein types in animal feed over the study period.
- Personal care and cosmetics is the fastest-growing segment and is projected to register a CAGR of 6.79% by value during the forecast period. Proteins are used in a range of cosmetics products, including emulsions, gels, shampoos, conditioners, and creams. Proteins naturally found in the body, such as collagen, elastin, and keratin, are also gaining popularity owing to their higher efficacy in naturally strengthening skin and hair texture. Companies like Estee Lauder and Guerlain are increasingly investing in research and development to come up with more effective and sustainable alternative protein sources. This is further

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boosting the ingredient scope and application in personal care products and will aid the market's growth in the future.

United States 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. Inasmuch'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

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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%).

US Protein Industry Overview

The United States Protein Market is fragmented, with the top five companies occupying 28.55%. The major players in this market are Archer Daniels Midland Company, Darling Ingredients Inc., Glanbia PLC, 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

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