

North America Whey Protein Ingredients - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The North America Whey Protein Ingredients Market size is estimated at 1.13 billion USD in 2025, and is expected to reach 1.46 billion USD by 2030, growing at a CAGR of 5.17% during the forecast period (2025-2030).

Strategic investments by companies, coupled with growing fitness-conscious consumers, driving the application of whey protein ingredients, especially in the supplements and F&B segments

- The North American whey protein market's largest application segments are the F&B and supplements segments. Snacks dominated the F&B segment, accounting for a 48.44% volume share in 2022. Key players like Nestle, Arla Foods, and Fonterra Group are widely investing in product formulations to cater to the snack industry's surge in demand. In the supplements segment, sports nutrition held a major share of 94.6% by volume in 2022. The growth can be attributed to the increasing demand for whey protein in the fitness industry as a muscle-building supplement. In 2021, Canada had about 6.18 million members registered in the gym, i.e., roughly 938 members per gym.
- The beverage sub-segment is projected to register with the fastest CAGR of 3.37% by value during the forecast period, followed by condiments/sauces. Owing to its superior nutritional attributes, neutral flavor, ease of digestion (10g/hr), and distinctive functioning in beverage systems, whey protein is frequently used as the protein source for RTD protein beverages. WPC offers excellent fat replacement properties, such as emulsification by maintaining an isoelectric point at pH 4.4, boosting its use in dressings, sauces, etc.
- The fastest-growing end-user segment is personal care and cosmetics, which is projected to register a CAGR of 4.74% over the forecast period. This is due to the rising number of beauty clinics and rising per capita spending on personal appearance. The average income and expenditure on personal care and services in the United States increased by 19.3% during 2020-2021. Whey

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protein has increased functionalities, like skin elasticity and hair conditioning, with the help of amino acids found in whey protein, which is boosting its demand in the segment.

The United States held a majority of the share in 2022 due to the strong presence of various food manufacturing units

- The United States led the North American market with the largest share in 2022, attributed to a high consumer base and the extensive food manufacturing units being established. The production consolidation practiced by major players results in easy accessibility and competitive whey protein prices, boosting market value. The whey protein market in the United States is highly driven by the food and beverage segment (51.6%), which held a significant share, followed by the supplements segment (47.6%) in 2022. Whey protein has a superior, branched-chain amino acid content of natural protein sources compared to other proteins. It can stimulate muscle protein synthesis in a dose-dependent manner.
- Canada remained the second-largest market in 2022, driven by high protein consumption in the supplements segment. Canada is an emerging market for whey protein. The booming trend of healthy food in the country has created significant demand for ingredients such as whey protein. Whey protein usage was mainly observed in sports nutrition due to the increasing number of fitness enthusiasts and fitness clubs. The Canadian sports nutrition segment is projected to register a CAGR of 5.39% during the forecast period. The dominance of the dairy industry within Canada's protein market has provided favorable growth opportunities for the whey protein market.
- Mexico is the fastest-growing country for whey protein in North America, projected to register a CAGR of 6.11% during the forecast period. The booming functional food and bakery industries spiked the demand for dairy ingredients in Mexico, with whey protein being the best alternative. Protein bars with whey protein are becoming popular among consumers due to their functional properties, thus driving the market.

North America Whey Protein Ingredients Market Trends

Sport/performance nutrition to witness significant growth during the forecast period

- The North American plant protein-based sports nutrition market grew by 23.65% in value from 2016 to 2019. In 2020, it witnessed a steep decline of 3.35% in its Y-o-Y growth rate. This decline was attributed to gym closures due to lockdowns and COVID-19-related restrictions in major countries like the United States, Canada, and Mexico. For instance, health clubs, one of the common sales channels for supplements, impacted the sales of supplements adversely as the pandemic took a harsh toll on fitness club operators, employees, and consumers. In 2020, more than 17% of fitness facilities were permanently closed in the United States.
- North America is one of the world's leading sport and performance nutrition markets, owing to the increasing trend of athleticism and rising health awareness. The innovation of new flavors with health benefits is predicted to support the market growth by 18% during the forecast period (2023-2029). The increased consumers' proclivity to maintain nutrition boosts the demand for plant proteins. Fortified organic products also witnessed a growth of around 40% from 2019 to 2021.
- In North America, the demand for sports nutrition products is rising quickly from core users and consumers who lead active lifestyles. Light users consumed sports nutrition items focused on energy, weight control, muscle support, and healthy snacking. Sports supplements essential for muscular growth, strength performance, endurance, and recovery are mainly preferred by core or heavy users. For instance, in 2021, within the United States, 41.7% of users were consuming protein products, boosting plant protein sales as the preference for a plant-based diet increased by 27% from 2019 to 2020.

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Increasing dry whey production to stabilize whey protein prices during forecast period

- The United States is the major dry whey producing country in the region. Whey production is mainly driven by the supply from cheese production plants, accounting for most of the country's liquid whey production. As of April 2022, there were over 500 cheese production plants in the United States. Whey powder dominates the whey products market, closely followed by WPC. In 2021, around 934 million pounds of dry whey is produced in the country.
- Major companies are working toward securing additional whey plants. Sports and performance nutrition products drive strong growth in the high-end protein ingredients sector. WPC is produced by removing a certain percentage of non-protein constituents from pasteurized whey derived from cheese processing. The finished WPC products available for food aid are WPC34, which contains more than 34% whey protein, and WPC80, which includes more than 80% protein.
- In 2020, the overall whey production declined due to the pandemic because production plants had shut down across the nation. The production volume of dry whey was nearly 951 million pounds, down by 2.7%. The production volume of WPC was about 478 million pounds, down by 2.7% from that of 2019. On the contrary, production in milk plants witnessed a surge due to panic buying, which stabilized after April 2020. The production of dry whey for the animal feed sector is stable as prices remain unchanged. Although WPC production is stable, some market players expect higher prices for higher-concentration WPC in the next few quarters, which will likely positively impact production.

North America Whey Protein Ingredients Industry Overview

The North America Whey Protein Ingredients Market is fragmented, with the top five companies occupying 27.29%. The major players in this market are Arla Foods amba, Fonterra Co-operative Group Limited, FrieslandCampina Ingredients, Glanbia PLC and Groupe Lactalis (sorted alphabetically).

Additional Benefits:

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

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