

South America Animal Protein - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The South America Animal Protein Market size is estimated at 617.9 million USD in 2025, and is expected to reach 780.7 million USD by 2030, growing at a CAGR of 4.79% during the forecast period (2025-2030).

Prominent application based on functionality and suitability with growing demand protein-enriched products drive the food and beverages sector

- By end-user, the F&B industry is the leading application sector for animal protein in the region. The key sub-segments of the F&B segment are bakery and dairy/dairy alternatives, both of which accounted for more than 46% of the total volume in 2022. Gelatin remains the most used protein in the bakery sector as it adds protein and acts as a transparent gelling and thickening agent in baked goods.
- In addition to the F&B segment, the supplements segment had the highest application share, with 78% of the application dominated by the sports nutrition sub-segment in 2022, primarily due to rising obesity across the region. Argentina, whose 28.3% of the population is overweight, was the most obese country in South America in 2021. With 28% of its population obese, Chile ranks second. With 27.9%, Uruguay ranks third. However, the whey protein-enriched personal care sector is projected to register the highest CAGR value of 4.43% in (2023-2029), owing to its functionalities as a skin smoothening and hair conditioning agent.
- Dairy and dairy alternatives is another important segment for animal proteins in the region, and it recorded a CAGR of 3.19% during the study period. The rise in sales comes with the usage of casein as a coagulant in cheese manufacture, along with the ongoing trend of protein fortification in the dairy desserts category. Manufacturers of products like ice creams and yogurts have launched protein-enriched versions of their existing products to make the "high protein" and "added protein" claims. As a result, after casein and caseinates (which has application in the cheese industry), whey protein and milk protein were the most used

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animal proteins in the segment. These proteins are also added to improve mouthfeel, viscosity, and structure.

Brazil followed by Rest of South America with increasing involvement in fitness and sports activities lead the segmental growth

- By country, Brazil claimed the largest share in 2022, with the animal protein demand from the F&B and supplements sectors dominating the sales. This high demand can be attributed to the country's aging population, which is estimated to triple by 2050, covering around 66 million Brazilians. In line with growing concerns, consumers are increasingly getting involved in fitness and sports activities, increasing the proportion of the non-athletic population among supplement consumers. As a result, Brazil is expected to record the fastest growth potential among all South American countries, with a CAGR of 6.72% during the forecast period.
- The dairy industry in the region is very well developed, so milk production is very high in South American countries. Brazil and Argentina are the major milk-producing countries in the continent. Chile and Uruguay are also emerging as major milk-producing countries. Therefore, the region always has a consistent supply of raw materials for dairy protein production. Dairy and dairy alternatives and bakery were the largest end-user segments for animal proteins in the region, representing over 46% of the total volume in 2022.
- Food and beverage was the largest end-user segment, with over 73.5% of the total volume of animal protein sales in the region. The majority of the sales in the segment come from the dairy and dairy alternatives sub-segment, which recorded a CAGR of 3.19% during the study period. South America produced 66.412 million ton of calf milk in 2020, which provided a sizable amount of the raw materials used to make dairy proteins. Due to the region's extensive milk production, key players like Arla and Fonterra have established dairy ingredient production plants.

South America Animal Protein Market Trends

Increasing preference for protein rich diet to influence consumption

- The graph illustrates the per capita consumption of animal protein across South American countries. Despite economic challenges, South America is witnessing a growing appetite for health and wellness products. Concerns over mobility-related health issues, such as osteoporosis and joint health, are paramount for consumers. Consequently, collagen manufacturers are increasingly targeting dietary supplement producers to meet this demand. In 2018, Brazil led the region, with health and wellness product consumption exceeding USD 21.7 billion. The region is also grappling with a surge in diseases like cardiovascular issues and diabetes, prompting a shift towards animal-based dietary supplements.
- South American consumers are becoming more cognizant of the link between diet and health, propelling the market's expansion. The sales of protein-rich foods are surging, driven by a heightened appetite for functional and fortified foods. Consumers are showing a clear preference for natural and organic options in their daily diets. Notably, by 2022, Argentina saw a staggering 125% rise in organic packaged food and beverage consumption from 2020.
- Brazilians exhibit a pronounced inclination towards cosmetics, prompting industry players to ramp up investments in collagen and gelatin peptides. These peptides find applications not just in dietary supplements but also in cosmetics. For optimal skin health, Brazilians are advised to consume 2.5 grams of collagen peptides. Alarming health statistics, such as a 16% rise in the mortality rate in 2020 due to issues like rheumatoid arthritis and osteoporosis, underscore the anticipated surge in demand for collagen peptide-based supplements in the coming years.

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Milk and meat production contributes majorly as raw material for animal protein ingredients manufacturers

- The graph illustrates the production trends of key raw materials in South America, including cattle and pig meat with bone, fresh or chilled; raw milk from cattle and goats; skim milk from cows; and dry whey powder. Notably, while chicken meat production faced challenges, other animal proteins, like milk proteins, whey proteins, casein, and caseinates, rely heavily on milk as their primary raw material. After a dip in 2019, primarily due to adverse weather and economic conditions, milk production rebounded strongly in 2020. However, this positive momentum is now overshadowed by the uncertainties stemming from the ongoing COVID-19 pandemic. Argentina and Uruguay saw year-to-date growth rates of 8.7% and 3.9%, respectively, in the first half of 2020. Additionally, net importing nations on the Pacific coast, such as Colombia and Chile, also experienced notable production upticks.
- Argentina stands out as a significant milk producer in the region. Yet, the sector faces challenges due to government policies, marked by trade interventionism and a heavy tax burden, leading to operational complexities and reduced investments. Despite these hurdles, Argentina managed a 4% increase in total milk output in 2021 compared to 2020. The region also derives animal proteins like collagen and gelatin from its meat slaughtering activities. Brazil, on the other hand, continues to bolster its beef production, emphasizing investments in production efficiency, disease control, and supply chain transparency. Notably, Brazil's beef productivity surge is largely attributed to a substantial increase in its national herd, which grew by nearly 17 million heads over two decades.

South America Animal Protein Industry Overview

The South America Animal Protein Market is fragmented, with the top five companies occupying 13.77%. The major players in this market are Arla Foods amba, Darling Ingredients Inc., Kerry Group plc, Royal FrieslandCampina N.V and Saputo Inc (sorted alphabetically).

Additional Benefits:

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

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