

# Dairy Ingredients in Nutritional Sectors

## Supply/Demand Patterns in Food & Supplements

2022 – 2027

Europe, North America, ME, APAC

### INTRODUCTION

The market for dairy ingredients has been largely affected in the last 5 years by several factors including Brexit, the Covid-19 pandemic, the Russia-Ukraine conflict, and inflationary pressures, causing supply chain disruptions and a supply-demand gap. Covid-19 resulted in a shift in consumption from lower-value dairy products to higher-value products. Post-Covid, consumer interest in healthy lifestyles heightened and the demand for high-protein dairy ingredients in nutritional products increased, leading to growth of demand for all milk protein ingredients in 2022. Sports nutrition was the most important application sector for caseinate, as well as MPI, MCC/MCI, and native whey. Many manufacturers focus on organic milk proteins to widen consumer appeal.

In Europe and North America, clean-labelling for functional dairy ingredients has become important. As consumers demand high-quality proteins for muscle growth, weight management, and satiety, there is an expectation for ingredients to be clean-label, organic, or natural. Tags such as "natural" and "organic" give the perception of good health, and drives much of the demand growth.

Though the inclusion of dairy ingredients, such as whey and milk protein, in nutritional applications is primarily for protein delivery, ingredients such as whole milk powder, skimmed milk powder, and whey powder provide functional properties such as emulsification, gelling, coating, and solubility, as well as improvement of the overall biological value of the product.

This study will present in-depth research on the production of dairy ingredients and their implementation in nutritional sectors, such as infant nutrition, sports nutrition, clinical nutrition, pet food, and animal feed. The latest dairy sector trends will be provided based on interaction with end-users and industry experts.

### OBJECTIVES

- To quantify the current (2022) market demand and to forecast volumes and trends to 2027 for the end-products and the dairy ingredients they contain
- To understand the choice – the “why” and “why not” – for the use of dairy ingredients and other competitive ingredients based on in-depth interviews with end-users
- To determine the specific functionalities required by the different nutritional sectors
- To establish the supply scenario of the selected ‘ingredients’
- To identify opportunities for entry into key sectors/products

### PRODUCTS

Skimmed milk powder, whole milk powder, milk protein concentrates, whey powders, whey permeate, WPCs, WPI, hydrolysed dairy proteins, casein/caseinates, lactose, lactoferrin, milk calcium, other (e.g. peptides). *Small commercial volume ingredients, such as milk oligosaccharides will not be included.*

### SECTORS

Infant formula, baby foods/cereals, dietetic/energy products, clinical nutrition, petfood and animal nutrition

### GEOGRAPHICAL

North America (USA+Canada), Europe (EU27+UK+NO+CH), ME (UAE+KSA), APAC (China, India, Indonesia, Philippines, Thailand, Malaysia)

### TIMESCALE

2022 – 2027

### PROGRAMME

Following an initial review of Giract’s extensive in-house data, the dominant element of the study will comprise information obtained through interviews with key players – producers, blenders, and end-users – in order to derive a real understanding of the latest changes in market forces.

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