

## Business Review

**The Changing World of Protein Ingredients**

GLOBAL, WITH A FOCUS ON USA, EUROPE, CHINA, INDIA, ASEAN

2016 - 2021

**INTRODUCTION**

Protein ingredients have become an integral part of many packaged food formulations, with both a nutritional and technical function. Over the years, since the introduction of proteins as “ingredients”, many changes have occurred in supply/availability of raw materials and consumer preferences. These have in turn influenced the development of the market for specific protein ingredients. Whey proteins were originally introduced to add value to a problematic side stream of cheese production. Since then, whey proteins have become the gold standard for nutritional use of protein ingredients. There is also an increased diversity of whey (and milk) protein ingredients now. The introduction of soy proteins, once again as a result of value addition of a side stream, was initially not considered a challenge for dairy proteins. But over time, despite issues such as GM, allergenicity and taste, soy proteins occupied a significant share of the global protein ingredients market. Since 2009, the status quo between dairy and soy proteins has been maintained, despite many innovations and market changes that could have influenced this. The improvement in organoleptic properties of soy proteins and the ease of availability of non-GM soy for example, were potential disruptors.

Given this long status quo, there is a reason for Giract to update its 2014 study on the global protein ingredients market. Many new protein ingredients (plant, insect and algal) have been introduced in the recent past. Having seen the development of the traditional protein sources, these proteins are already coming up with almost perfect functionality and positioning. These new protein sources represent a challenge to the existing whey and soy protein ingredients. The protein deficit in the diets of many populations could be addressed by the rational development and positioning of protein ingredients. This represents an enormous volume opportunity. Sustainability is a major concern for many food companies, as well as governments. Plant proteins represent a more sustainable source and could potentially take up the space currently occupied by non-dairy animal proteins. The west is taking the lead in this trend as a fad (meat analogues), but in developing nations this could soon be a necessity. Giract has now explored these and many more trends in the current update of the global protein ingredients market.

**OBJECTIVES**

Establish the competitive scenario amongst the different animal and plant derived protein ingredients and understand the dynamics vis-à-vis the new protein ingredients, which can be split into the following sub-objectives:

- To establish production/supply estimates by region and by product
- To identify producers and to estimate their shares in each region and product
- To estimate demand by end-use sector and by region
- To identify qualitative factors that determine use in the relevant sectors and to understand the penetration potential of new protein ingredient sources
- To forecast demand by product, end-user sector and region

**PRODUCTS**

Cereal derived proteins	-	Wheat/rice
Pulse derived proteins	-	Soy, pea, fava, lentils, chickpea
Root derived proteins	-	Potato
Dairy proteins	-	Whey, milk
Animal proteins	-	Gelatin, collagen, egg, HAP
Novel proteins	-	Algal, insect, fungal

**MARKETS**

USA/Canada, Mexico, Europe, China, India, ASEAN, RoW

**SECTORS**

Food (Bakery, dairy, processed meat, meat analogues, functional foods/supplements, clinical/infant, others), Feed (pet food, animal feed)

**TIMESCALE**

Current 2016; Forecast 2021

**PUBLICATION**

September 2017

**SUBSCRIPTION**

Full report: EUR 38250; Plant proteins: EUR 26850; Dairy+Animal+Novel: EUR 17870

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