+357 96 030922
info@marketpublishers.com

Processed Animal Protein Market Forecasts to 2032 – Global Analysis By Product Type (Meat & Bone Meal (MBM), Poultry By-Product Meal (PBM), Feather Meal, Blood Meal, Fish Meal, Hydrolyzed Protein, and Other Product Types), Animal Origin, Processing Method, Form, Application, End User and By Geography

https://marketpublishers.com/r/PA4626807AB6EN.html
Date: September 2025
Pages: 200
Price: US$ 4,150.00 (Single User License)
ID: PA4626807AB6EN

Abstracts

According to Stratistics MRC, the Global Processed Animal Protein Market is accounted for $14.91 billion in 2025 and is expected to reach $21.01 billion by 2032 growing at a CAGR of 5.02% during the forecast period.Processed Animal Protein (PAP) is a protein-rich material produced by rendering and processing animal by-products like meat, bones, fish residues, or blood, excluding ruminant and pet sources. It is widely applied in livestock feed, aquaculture, and pet food due to its high nutritional value and essential amino acids. PAP supports better feed performance while promoting sustainability by converting animal waste into a valuable, eco-friendly protein resource.

According to Brazilian Renderers data, in 2020, around 43% of 12.07 million metric tons of slaughtered by-products are converted into animal fats and protein meals.

Market Dynamics:

Driver:

Rising demand for high-protein animal feed

The expansion of livestock and aquaculture industries is driving the need for nutrient-dense feed solutions. PAPs, derived from rendered animal by-products, offer a

concentrated source of essential proteins and minerals. Their superior digestibility and amino acid composition make them highly effective in boosting animal growth and feed efficiency. As producers seek alternatives to conventional plant proteins, PAPs are gaining favor for their performance benefits. The shift toward cost-effective and high-yield feed formulations is accelerating their uptake. This trend is reinforcing PAPs' role as a cornerstone in modern feed strategies.

Restraint:

Consumer concerns over safety and quality

Many individuals remain skeptical about the potential risks associated with disease transmission, contamination, and the overall nutritional integrity of animal-based protein products. Issues such as improper processing methods, lack of transparency in sourcing, and fear of adulteration further add to consumer hesitation. Additionally, rising awareness regarding health impacts and ethical considerations influences purchasing decisions, creating resistance toward PAP adoption. Stricter regulatory scrutiny and frequent recalls in the food industry also heighten consumer doubts, ultimately slowing down market penetration and limiting wider acceptance of processed animal protein products.

Opportunity:

Rising focus on circular economy and sustainability

PAPs are gaining recognition as sustainable solutions that repurpose animal waste into valuable feed inputs. Their use supports circular economy goals by minimizing landfill and maximizing resource efficiency. This aligns with global initiatives to reduce environmental impact across food systems. Regulatory bodies and sustainability-focused organizations are endorsing PAPs as part of responsible waste management. Advances in rendering technology are enhancing product quality and expanding their applications. As sustainability becomes a procurement priority, PAPs offer a compelling alternative to traditional feed ingredients.

Threat:

Risk of disease transmission concerns

The possibility of disease spread through inadequately processed animal proteins remains a major risk. Pathogens like Salmonella and prions have prompted strict safety protocols and trade restrictions. Any lapse in processing standards can lead to reputational damage and regulatory penalties. International trade of PAPs often involves complex documentation and veterinary checks. Public health campaigns and watchdog groups can amplify fears, especially in markets with limited awareness.

Covid-19 Impact

The pandemic caused significant disruptions in PAP production due to labor shortages and facility closures. Reduced slaughterhouse activity led to lower availability of raw materials for rendering. Logistics bottlenecks and export limitations further strained global supply chains. However, the crisis also highlighted the need for resilient and locally sourced feed solutions. As recovery progressed, demand for PAPs rebounded, particularly in regions focused on food security. The shift toward digital procurement and traceability has reshaped how PAPs are sourced and distributed.

The meat & bone meal (MBM) segment is expected to be the largest during the forecast period

The meat & bone meal (MBM) segment is expected to account for the largest market share during the forecast period, due to its affordability, nutrient density, and compatibility with sustainable feed practices. Innovations in rendering have improved its nutritional value and safety, expanding its use in aquafeed and pet nutrition. Key trends include sourcing from non-GMO inputs and growing adoption in Asian livestock systems. Regulatory easing like China’s updated feed policies and escalating phosphate prices are further driving MBM’s integration into global feed formulations.

The pet food manufacturers segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the pet food manufacturers segment is predicted to witness the highest growth rate, propelled by growing consumer interest in high-protein, premium pet diets and the trend of treating pets like family. Innovations in extrusion and AI-driven automation improve product quality and digestibility. Notable trends include raw and freeze-dried options, sustainable sourcing, and novel proteins like insects and cultured meat. Recent developments emphasize eco-friendly practices, human-grade ingredients, and specialized formulations for allergies and weight control, reshaping industry standards and consumer preferences.

Region with largest share:

During the forecast period, the Asia Pacific region is expected to hold the largest market sharedue togrowing needs in pet nutrition, animal feed, and eco-friendly waste solutions. Enhanced rendering technologies are boosting safety and operational efficiency, while supportive regulations foster market expansion. Notable trends include the rise of collagen and gelatin in beauty and wellness products, and clean-label innovations in food. Key developments span protein-rich formulations and increased activity across India, China, and Southeast Asia, driven by urban growth and shifting consumer habits.

Region with highest CAGR:

Over the forecast period, the North America region is anticipated to exhibit the highest CAGR, driven by growing interest in high-protein, ready-to-eat foods, alongside innovations in livestock monitoring and sustainable feed solutions. Notable progress includes clean-label product lines and enhanced nutritional profiles for health-conscious consumers. Trends like organic and hormone-free meat, plus tech-enabled traceability, are reshaping purchasing behaviour. Industry players are ramping up R&D to deliver differentiated protein formats, while stricter food safety regulations are reinforcing trust and accelerating market expansion.

Key players in the market

Some of the key players profiled in the Processed Animal Protein Market include Darling Ingredients Inc., FASA Group, Sonac BV, Rendac, Tyson Foods Inc., APC Inc., JBS S.A., BEC Feed Solutions, Smithfield Foods, Agrosuper, Cargill Inc., Daka Denmark A/S, West Coast Reduction Ltd., Saria Group, Sanimax, Leo Group Ltd., Terramar Chile, and Valley Proteins Inc.

Key Developments:

In June 2025, Wen’s Food Group (China) significantly reduced soymeal usage in its feed formulations and advanced the use of insect protein and synthetic amino acids to comply with China's national feed reform, alongside Muyuan Foods.

In November 2024, BRF S.A. (Brazil) signed a binding agreement to acquire a processed foods plant in Henan, China, for US$?$43?million, with an additional $36?million investment planned to double production capacity by Q1 2025, aiming to strengthen its direct presence in the Chinese market.

Product Types Covered:

- Meat & Bone Meal (MBM)
- Poultry By-Product Meal (PBM)
- Feather Meal
- Blood Meal
- Fish Meal
- Hydrolyzed Protein
- Other Product Types

Animal Origins Covered:

- Porcine
- Bovine
- Poultry
- Fish/Marine

Processing Methods Covered:

- Rendering
- Hydrolysis
- Drying & Milling
- Defatting & Fractionation

Sterilization & Heat Treatment

Forms Covered:

Powder

Granules

Liquid

Pre-mixes

Applications Covered:

Livestock Feed

Aquaculture Feed

Industrial Uses

Pet Food

Organic Fertilizers

Other Applications

End Users Covered:

Compound Feed Manufacturers

Integrators & Large Farms

Aquaculture Producers

Pet Food Manufacturers

Fertilizer Producers

Distributors & Traders

Other End Users

Regions Covered:

North America

US

Canada

Mexico

Europe

Germany

UK

Italy

France

Spain

Rest of Europe

Asia Pacific

Japan

China

India

Australia

New Zealand

South Korea

Rest of Asia Pacific

South America

Argentina

Brazil

Chile

Rest of South America

Middle East & Africa

Saudi Arabia

UAE

Qatar

South Africa

Rest of Middle East & Africa

What our report offers:
- Market share assessments for the regional and country-level segments
- Strategic recommendations for the new entrants
- Covers Market data for the years 2024, 2025, 2026, 2028, and 2032
- Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)
- Strategic recommendations in key business segments based on the market

estimations
- Competitive landscaping mapping the key common trends
- Company profiling with detailed strategies, financials, and recent developments
- Supply chain trends mapping the latest technological advancements

Free Customization Offerings:

All the customers of this report will be entitled to receive one of the following free customization options:

Company Profiling

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

Regional Segmentation

Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)

Competitive Benchmarking

Benchmarking of key players based on product portfolio, geographical presence, and strategic alliances

+357 96 030922
info@marketpublishers.com

Contents

+357 96 030922
info@marketpublishers.com

5 GLOBAL PROCESSED ANIMAL PROTEIN MARKET, BY PRODUCT TYPE

5.1 Introduction
5.2 Meat & Bone Meal (MBM)
5.3 Poultry By-Product Meal (PBM)
5.4 Feather Meal
5.5 Blood Meal
5.6 Fish Meal
5.7 Hydrolyzed Protein
5.8 Other Product Types

6 GLOBAL PROCESSED ANIMAL PROTEIN MARKET, BY ANIMAL ORIGIN

6.1 Introduction
6.2 Porcine
6.3 Bovine
6.4 Poultry
6.5 Fish/Marine

7 GLOBAL PROCESSED ANIMAL PROTEIN MARKET, BY PROCESSING METHOD

7.1 Introduction
7.2 Rendering
7.3 Hydrolysis
7.4 Drying & Milling
7.5 Defatting & Fractionation
7.6 Sterilization & Heat Treatment

8 GLOBAL PROCESSED ANIMAL PROTEIN MARKET, BY FORM

8.1 Introduction
8.2 Powder
8.3 Granules
8.4 Liquid
8.5 Pre-mixes

9 GLOBAL PROCESSED ANIMAL PROTEIN MARKET, BY APPLICATION

+357 96 030922
info@marketpublishers.com

+357 96 030922
info@marketpublishers.com

+357 96 030922
info@marketpublishers.com

+357 96 030922
info@marketpublishers.com

List Of Tables

LIST OF TABLES

+357 96 030922
info@marketpublishers.com

Table 38 Global Processed Animal Protein Market Outlook, By Fertilizer Producers (2024-2032) ($MN)
Table 39 Global Processed Animal Protein Market Outlook, By Distributors & Traders (2024-2032) ($MN)
Table 40 Global Processed Animal Protein Market Outlook, By Other End Users (2024-2032) ($MN)
Note: Tables for North America, Europe, APAC, South America, and Middle East & Africa Regions are also represented in the same manner as above.

+357 96 030922
info@marketpublishers.com

I would like to order

Product name: Processed Animal Protein Market Forecasts to 2032 – Global Analysis By Product Type (Meat & Bone Meal (MBM), Poultry By-Product Meal (PBM), Feather Meal, Blood Meal, Fish Meal, Hydrolyzed Protein, and Other Product Types), Animal Origin, Processing Method, Form, Application, End User and By Geography

Product link: https://marketpublishers.com/r/PA4626807AB6EN.html

Price: US$ 4,150.00 (Single User License / Electronic Delivery)

If you want to order Corporate License or Hard Copy, please, contact our Customer Service:
info@marketpublishers.com

Payment

To pay by Credit Card (Visa, MasterCard, American Express, PayPal), please, click button on product page https://marketpublishers.com/r/PA4626807AB6EN.html