

Protein Hydrolysates Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Type (Milk, Meat, Marine, Plant, Eggs, and Others), By Source (Animals, Plants and Microbes), By Form (Liquid and Powder), By Process (Enzymatic Hydrolysis and Alkaline Hydrolysis), By Application (Animal Feed, Infant Nutrition, Clinical Nutrition, Sports Nutrition, Dietary Supplements and Others), By Region and Competition, 2019-2029F

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Abstracts

Global Protein Hydrolysates Market was valued at USD 856.10 Million in 2023 and is anticipated to project impressive growth in the forecast period with a CAGR of 7.68% through 2029. Protein hydrolysates are generated through protein hydrolysis, resulting in a complex mixture of oligopeptides, peptides, and free amino acids. These biopeptides, or bioactive peptides, possess pharmacological properties that are beneficial. They are produced by partial or extensive hydrolysis using acid, alkali, or enzyme. These preparations provide the nutritional equivalent of the original substance in the form of its constituent amino acids. As such, they are utilized as nutrient and fluid replenishers in specialized diets or for individuals unable to consume regular dietary proteins. With the ability to enhance amino acid absorption more efficiently than intact protein, they maximize nutrient delivery, offering a range of health benefits. Notably, protein hydrolysates find diverse applications in the food and beverage industry. Protein hydrolysates are widely recognized for their nutritional, functional, and bioactive properties. While chemical hydrolysis can yield hydrolysates, controlled enzymatic hydrolysis remains the preferred technique. Animal Protein Hydrolysates offer high nutritional value without the use of chemicals. For instance, Fish Protein Hydrolysates

are organic fertilizers derived from enzymatic conversion of fish proteins into smaller peptides consisting of 2 to 20 amino acids. These hydrolysates play a crucial role in improving livestock metabolism and overall health. The growing demand for chemical-free and safe animal feed has led to an increased adoption of Fish Protein Hydrolysates as a viable alternative.

Key Market Drivers

Ease of Scaling Up Protein Hydrolysis Processes

Advances in technology and process optimization have made it easier to scale up protein hydrolysis processes. This results in higher production volumes within a shorter time frame, meeting the growing demand for protein hydrolysates more effectively. As scaling up becomes more efficient, the cost per unit of protein hydrolysate produced tends to decrease. This cost-effectiveness makes protein hydrolysates a more attractive option for various industries, such as food, pharmaceuticals, and cosmetics, leading to an increase in demand. Protein hydrolysates are used in a range of applications, including functional foods, sports nutrition, medical nutrition, and animal feed. The ability to scale up production makes these versatile products more accessible to different industries, further driving demand. There's a growing consumer interest in health and wellness products, including those containing high-quality protein sources. Protein hydrolysates, with their potential health benefits, align well with these trends, resulting in increased consumer demand and subsequently higher production needs.

Protein hydrolysates, obtained through enzymatic and chemical hydrolysis techniques, offer scalability advantages, leading to their growing adoption among protein supplement manufacturers and driving market revenue growth. Recent reports published in the National Center of Biotechnology Information (NCBI) in 2021 highlight initiatives undertaken to enzymatically hydrolyze bovine plasma protein for the production of antioxidants and scale up the process for commercial applications. This development is expected to boost the utilization of natural bovine-based hydrolysates in the healthcare sector as nutraceutical supplements.

Increasing Prevalence of Protein Deficiency Diseases in Children

Kwashiorkor and Marasmus are two of the most commonly identified protein-deficiency diseases in developing countries, particularly those with a high prevalence of malnutrition. These diseases lead to reduced cardiac activity, anemia, inefficient renal salt extraction, fat deposition in the liver, and even death. Children are the most

affected, with a mortality rate exceeding 25%. The prevalence of these diseases, caused by a lack of nutritious diets, can be mitigated by substituting traditional protein sources, which are challenging to obtain and digest, with protein hydrolysate alternatives. Protein hydrolysates provide a concentrated and easily digestible source of high-quality protein, making them suitable for supplementing the diets of children who are protein deficient. Children suffering from protein deficiency diseases may have compromised digestive systems, making it difficult for them to absorb nutrients effectively. Protein hydrolysates, due to their pre-digested nature, can help bypass certain digestive challenges and provide essential amino acids that are readily absorbed, aiding in recovery. Children with severe protein deficiency diseases often have difficulty tolerating whole proteins due to gastrointestinal issues. Protein hydrolysates are broken down into smaller peptides and amino acids, making them gentler on the digestive system and more likely to be tolerated by children with sensitive stomachs. Protein hydrolysates can be formulated to have specific amino acid profiles, addressing the particular nutritional needs of children with protein deficiency diseases. Certain amino acids, like lysine and tryptophan, are crucial for growth and immune system function, and protein hydrolysates can be tailored to provide these nutrients in optimal amounts.

Increasing Demand for Protein Supplements

Protein supplements have gained popularity for various purposes, such as muscle building, weight management, and general health improvement. Protein hydrolysates offer several advantages that make them attractive to individuals seeking protein supplementation, thus contributing to their rising demand. Protein hydrolysates are pre-digested proteins, broken down into smaller peptides and amino acids. This results in faster absorption compared to whole proteins, making them ideal for post-workout recovery when the body requires quick nutrient delivery. Athletes and fitness enthusiasts often turn to protein supplements to support muscle recovery and growth. Protein hydrolysates, due to their rapid absorption and higher levels of branched-chain amino acids (BCAAs), can help stimulate muscle protein synthesis effectively. Protein hydrolysates provide a rich source of high-quality amino acids, which are the building blocks of proteins. These amino acids contribute to various physiological functions, including immune support, hormone synthesis, and enzymatic activity.

Protein supplements play a crucial role in bodybuilding products, contributing to the growing demand for protein hydrolysates. These hydrolysates are essential for cell regeneration and tissue repair. The rising health consciousness and enthusiasts' interest in bodybuilding are key factors driving market growth. The market for protein

hydrolysates is further propelled by their notable characteristics, including high solubility and extensive application in nutritional and supplementary powders. Additionally, the demand for infant formula and the prescription of alternative formulas by pediatricians for lactose-intolerant infants have significantly contributed to market expansion. Manufacturers are continuously introducing innovative features, making protein hydrolysates one of the most effective options available in the market.

Growing Demand for Animal Protein Hydrolysates

The growing demand for animal Protein Hydrolysates is a key factor driving the market. Animal proteins offer numerous advantages over plant-based proteins, such as an improved amino acid profile and excellent solubility in hot or cold water. Consequently, these products exhibit greater compatibility with various food ingredients, including thickeners, stabilizers, gelling agents, emulsifiers, and other substances. Moreover, animal proteins can be utilized in the production of lactose-free dairy products by eliminating peptides responsible for the bitter taste in milk. The demand for animal Protein Hydrolysates is expected to rise further due to increasing research on their potential health benefits in human nutrition. Notably, the CDC (Centers for Disease Control and Prevention) reports that almost half of US adults experience health issues related to anemia. Animal proteins, being rich in iron, play a significant role in mitigating this risk. Animal protein hydrolysates are used as key ingredients in nutritional supplements due to their high-quality protein content and bioavailability. These supplements cater to various consumer needs, including muscle building, recovery, and overall health improvement.

Key Market Challenges

High Cost of Hydrolysates Whey Protein

Product introductions, joint endeavors, unification, and attainment hold significant potential as protein sources for human consumption. However, their production requires dehydration, which necessitates high energy levels. This level of product expectation is often considered costly. Additionally, the specific usage requirement for various diseases, such as enzymatic hydrolysis, adds complexity to the process of obtaining hydrolysates at the molecular level. These factors contribute to market constraints.

Unpleasant Flavor Remains a Long-term Challenge

Various amino acids and peptides, including hydrophobic peptides, present in protein

hydrolysates contribute to the bitter taste of protein supplements, potentially discouraging consumers. The addition of artificial sugars, sugar alcohols, and flavoring chemicals to mitigate bitterness may compromise the nutritional value and protein content of the product. Consequently, the growth of the protein hydrolysates market is expected to be significantly hindered. De-bittering methods such as chromatographic techniques, alcohol precipitation extraction, or activated carbon can be employed; however, this will inevitably raise the production costs of hydrolysates. Additionally, the emergence of innovative protein supplement substitutes known as Ingredient Optimized (IO) proteins is projected to limit the revenue growth of the protein hydrolysates market. Diverse IO protein variants, including ioWhey Protein, collagen, ioBCAA, and ioPea, exhibit superior qualities compared to their natural counterparts and are readily absorbed by the body. Clinical research indicates that IOWhey possesses a bioavailability that is 50% higher than WPH. Moreover, these substitutes boast a lack of bitter aftertaste, making them an ideal choice for post-workout meals.

Key Market Trends

Easy entry of E-commerce and Online Stores

The online network provides significant support to small manufacturers who may encounter various entry-level challenges, including expensive marketing expenses. The online channel serves as a platform for significantly reducing distribution costs and more effectively attracting customer attention. The utilization of online shopping for infant formula and sports nutrition products is on the rise, thanks to the increased adoption of modern technology and social networking platforms.

Growing Application for Infant Formula

Global attention is currently focused on a critical component of infant formula. These formulas serve as an alternative to mother's milk and are prescribed to infants and toddlers with genetic conditions such as lactose intolerance. However, a significant proportion of infants fed traditional infant formula experience severe gastrointestinal discomforts like colic and constipation. In light of this, the use of protein hydrolysates in infant nutritional products has gained prominence due to their ability to mitigate gastrointestinal problems. Consequently, the health and wellness sector, which is experiencing rapid growth, presents lucrative opportunities for the application of protein hydrolysates. This growing demand extends to infant formula, clinical nutrition, and similar products. As a result, producers of protein hydrolysates have a substantial opportunity to tap into untapped markets in this domain.

Segmental Insights

Type Insights

Based on the type, the market is categorized into milk, meat, marine, plant, eggs, and others. The milk type segment emerged as the dominant force in the market, capturing the largest market share in 2023. Milk-based protein products find extensive application in the food and beverage industry due to their versatile characteristics. The demand for milk protein products is rapidly increasing across various sectors, including sports nutrition, baby nutrition, and other nutritional supplements. These segments offer robust packaging and deliver powerful nutritional benefits, such as promoting safety, weight maintenance, and blood glucose control.

On the other hand, the plant segment is expected to exhibit steady growth throughout the forecast period. This segment encompasses nutrient-rich options like quinoa, oats, broccoli, lentils, hemp seeds, and nutritional yeast, which not only aid in weight loss but also provide essential building blocks for healthy muscle development. Additionally, plant-based proteins serve as a nutritious alternative to dairy and animal proteins. Furthermore, the growing preference for healthier, high-quality, and organic food products is driving the positive growth trajectory of the global market.

Source Insights

Based on source, the market is categorized into animals, plants and microbes. The Animal segment is projected to experience growth throughout the forecast period. Animal-based protein is widely recognized as a highly nutritious source of protein, encompassing white-meat poultry, fish, pork tenderloin, and extra lean cuts of beef (including greater than 95% lean ground beef). Animal protein is renowned for its health benefits and nutritional value, typically recommended at three to four servings (24-29 grams of protein) per meal. However, the microbes' segment is anticipated to demonstrate rapid growth during the forecast period. Bacteria possess their own genetic factor expression system, enabling the production of diverse proteins from injected genes. This capability has significantly streamlined protein function research and facilitated the production of large quantities of medically significant proteins such as insulin.

Regional Insights

The Asia Pacific region is poised to experience significant growth in the market for Protein Hydrolysates, both in terms of volume and value, in the upcoming years. This region encompasses emerging economies such as India, Malaysia, China, and Singapore, among others, which are among the fastest growing nations for Protein Hydrolysates in Asia-Pacific. The increasing per capita income and population in China and India, along with the growing preference for the product, are expected to drive the demand from various end-user industries, including clinical nutrition, animal feed, and infant nutrition manufacturers. During the forecast period, the Protein Hydrolysates Market in China is projected to witness the highest rise among other Asia Pacific nations.

Key Market Players

Kerry Group Plc.

Nestle S.A.

Arla Foods AMBA

AMCO Proteins, Inc.

Royal FrieslandCampina N.V.

Fonterra Co-Operative Group Limited

Parabel Nutrition Inc.

Healy Group

ADM Company

Danone Trading ELN B.V.

Report Scope:

In this report, the Global Protein Hydrolysates Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Protein Hydrolysates Market,By Type:

- oMilk

- oMeat

- oMarine

- oPlant

- oEggs

- oOthers

Protein Hydrolysates Market,By Source:

- oAnimals

- oPlants

- oMicrobes

Protein Hydrolysates Market,By Form:

- oLiquid

- oPowder

Protein Hydrolysates Market,By Process:

- oEnzymatic Hydrolysis

- oAlkaline Hydrolysis

Protein Hydrolysates Market,By Application:

- oAnimal Feed

- oInfant Nutrition

oClinical Nutrition

oSports Nutrition

oDietary Supplements

oOthers

Protein Hydrolysates Market, By Region:

oNorth America

United States

Canada

Mexico

oEurope

France

United Kingdom

Italy

Germany

Spain

oAsia-Pacific

China

India

Japan

Australia

South Korea

oSouth America

Brazil

Argentina

Colombia

oMiddle East Africa

South Africa

Saudi Arabia

UAE

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Protein Hydrolysates Market.

Available Customizations:

Global Protein Hydrolysates market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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