

United States Protein Ingredients Market By Product (Plant Proteins (Cereals, Legumes, Roots, Ancient Grains, Nuts & Seeds), Animal/Dairy Proteins (Egg Protein, Milk Protein Concentrates/Isolates, Whey Protein Concentrates, Whey Protein Hydrolysates, Whey Protein Isolates, Gelatin, Casein/Caseinates, Collagen Peptides), Microbe-based Protein (Algae, Bacteria, Yeast, Fungi), Insect Protein (Coleoptera, Lepidoptera, Hymenoptera, Orthoptera, Hemiptera, Diptera, Others)), By Application (Food & Beverages, Infant Formulations, Clinical Nutrition, Animal Feed, Others), By Region, By Competition Forecast & Opportunities, 2018-2028F

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Abstracts

The United States Protein Ingredients Market, with a valuation of USD 18.30 billion in 2022, is poised for remarkable growth in the forecast period, projecting an impressive Compound Annual Growth Rate (CAGR) of 6.60% through 2028. This market constitutes a substantial and dynamic sector within the broader food and beverage industry. Protein ingredients serve as indispensable components utilized in a diverse array of products, spanning from dietary supplements and sports nutrition to processed foods and beverages.

Key Market Drivers

Health and Wellness Trends

The United States Protein Ingredients Market is experiencing a significant surge in growth, and a key driving force behind this expansion is the ever-growing emphasis on health and wellness among consumers. As individuals become more health-conscious and seek to enhance their overall well-being, the demand for protein-rich products is reaching new heights. Protein is widely recognized as a fundamental building block of a healthy diet. It plays a crucial role in muscle development, tissue repair, and immune function. With the wellness movement gaining momentum, consumers are increasingly looking to incorporate protein into their daily routines to support their health goals, whether that involves muscle gain, weight management, or simply staying active and energetic. As the United States grapples with rising obesity rates and lifestyle-related health concerns, many individuals are turning to protein as a tool for weight management. Protein-rich diets have been shown to increase feelings of fullness and reduce overall calorie consumption. This satiety factor has made protein an essential component of many weight loss and maintenance plans, contributing to the growing demand for protein ingredients. The health and wellness movement has spurred a surge in physical fitness activities, from traditional workouts to niche exercise regimens. To support these efforts, consumers are seeking protein-rich foods and supplements to aid in muscle recovery and growth. Athletes and fitness enthusiasts have become a significant consumer segment, driving sales of protein-based products. The health and wellness trend has also given rise to an exploration of diverse protein sources beyond traditional animal-based options. Plant-based proteins, such as soy, pea, and rice protein, have gained immense popularity. Consumers who prioritize sustainability, ethical considerations, or dietary preferences are opting for these plant-based alternatives, leading to a broader market for protein ingredients. Consumers are becoming more discerning about the ingredients in their food. They are seeking products with clean labels, minimal processing, and functional benefits. Protein ingredients have adapted to these preferences, with manufacturers offering cleaner, more transparent options that cater to health-conscious consumers. The health and wellness trend have spurred innovation in the protein ingredients market. Manufacturers are continuously developing new protein-based products, including fortified beverages, protein bars, and plant-based meat alternatives. These innovative offerings not only cater to consumers' nutritional needs but also provide convenient, tasty options for those pursuing healthier lifestyles. The proliferation of health and wellness information through digital platforms and social media has increased consumer awareness about the benefits of protein-rich diets. This growing knowledge base empowers individuals to make informed dietary choices, including the inclusion of protein ingredients in their daily nutrition.

Rising Interest in High-Protein Diets

High-protein diets have taken center stage in the United States, with more people than ever before recognizing the pivotal role protein plays in supporting their health and wellness goals. This surge of interest in high-protein diets is not only transforming eating habits but also driving the remarkable growth of the United States Protein Ingredients Market. In recent years, there has been a profound shift in dietary paradigms. High-protein diets, once mainly associated with bodybuilders and athletes, have gained mainstream acceptance. Individuals across various age groups and lifestyles are now actively seeking out protein-rich foods and supplements as part of their daily nutrition. One of the key drivers behind the high-protein diet trend is its effectiveness in weight management. Protein has been shown to increase feelings of fullness and reduce appetite, which can help control calorie intake. This satiating effect makes protein-rich foods and snacks a popular choice for those aiming to shed excess pounds or maintain a healthy weight. The desire to build and maintain lean muscle mass is another significant motivator for individuals adopting high-protein diets. Protein is crucial for muscle repair and growth, making it an essential component of post-workout nutrition. This has led to a surge in demand for protein supplements, particularly among athletes, fitness enthusiasts, and those engaging in resistance training. To cater to the growing demand for high-protein diets, the market has witnessed an explosion of protein-infused products. From protein bars and shakes to protein-enriched snacks and even cereals, manufacturers are creating a wide array of options for consumers to easily incorporate more protein into their daily routines. While animal-based protein sources remain popular, plant-based protein ingredients have experienced a meteoric rise in demand. Health-conscious consumers are turning to plant-based options like soy, pea, and hemp protein for their nutritional needs, driven by concerns about sustainability, animal welfare, and dietary preferences. Functional foods, which are designed to provide specific health benefits beyond basic nutrition, are a thriving category within the high-protein trend. These products often feature protein ingredients that offer targeted health benefits, such as improved digestion, enhanced immunity, or better energy levels.

Growth of Sports Nutrition Segment

The United States Protein Ingredients Market is experiencing a significant surge in growth, and one of the most influential factors propelling this expansion is the booming sports nutrition segment. With an increasing number of people embracing an active lifestyle and prioritizing fitness, the demand for protein-rich products has reached new

heights. Sports nutrition has evolved far beyond its niche origins, and today, it caters to a broad spectrum of consumers. Athletes, fitness enthusiasts, and everyday individuals seeking to enhance their workouts or simply improve their overall health are all turning to sports nutrition products. Protein is a central component of sports nutrition, serving as the building block for muscle growth, repair, and recovery. Athletes and fitness enthusiasts have recognized the importance of protein in optimizing their physical performance, making it an essential element of their dietary regimens. Protein supplements, including powders, bars, and ready-to-drink shakes, have become staples for athletes and fitness enthusiasts. These convenient options provide a quick and efficient way to meet their protein needs, both pre- and post-workout. As a result, the demand for protein ingredients used in these products is on a rapid incline. Protein is not only essential for muscle building but also plays a critical role in muscle recovery and repair. This is particularly important for athletes who engage in strenuous workouts or competitions. Protein ingredients in sports nutrition products aid in reducing muscle soreness and accelerating the healing process, allowing athletes to perform at their best consistently. The sports nutrition industry has responded to growing demand by diversifying its product offerings. Protein-infused snacks, beverages, and even protein-fortified foods have proliferated, giving consumers a wide range of options to incorporate protein into their diets and training routines. As fitness influencers and athletes share their success stories and nutritional strategies on social media platforms, they are inspiring a broader audience to adopt sports nutrition practices. This 'influencer effect' has contributed to increased interest in protein-based products and supplements.

Plant-Based Protein's Ascent

The United States Protein Ingredients Market is undergoing a remarkable transformation, driven by the rapid ascent of plant-based proteins. As consumers increasingly prioritize health, sustainability, and ethical considerations, plant-based proteins have surged in popularity. Plant-based proteins, derived from sources like soy, pea, rice, hemp, and oats, have emerged as a powerful force in the food and nutrition industry. This shift reflects changing consumer preferences, as more individuals opt for plant-based diets or reduce their consumption of animal-based products. Consumers are increasingly making food choices that align with their health and wellness goals. Plant-based diets are often perceived as healthier due to their lower saturated fat content and potential benefits for heart health, weight management, and reduced risk of chronic diseases. As a result, people are incorporating plant-based proteins into their diets, boosting the demand for protein ingredients. The environmental impact of food choices has become a central concern for many consumers. Plant-based proteins are often viewed as a more sustainable and eco-friendly option compared to animal-based

sources. The reduced carbon footprint associated with plant-based proteins resonates with environmentally conscious consumers, further driving their popularity. Ethical concerns related to animal welfare and factory farming practices are influencing dietary decisions. Many consumers are choosing plant-based proteins as a way to align their diets with their values and minimize harm to animals, contributing to the plant-based protein trend. Plant-based proteins are highly versatile and can be incorporated into a wide range of food products, including meat alternatives, dairy alternatives, snacks, and baked goods. This versatility has allowed plant-based protein ingredients to penetrate various segments of the food industry, boosting their demand. Food manufacturers are continuously innovating to create plant-based products that mimic the taste and texture of traditional animal-based foods. Plant-based burgers, sausages, milk alternatives, and more have become mainstream choices. These products often rely on high-quality plant-based protein ingredients to deliver the desired taste and texture.

Key Market Challenges

Supply Chain Disruptions

One of the most pressing challenges faced by the protein ingredients market, like many industries, is the disruption of supply chains. Events such as the COVID-19 pandemic and extreme weather conditions can disrupt the production and transportation of key ingredients, impacting the availability and pricing of protein sources.

Sustainability and Sourcing Concerns

As consumers become increasingly eco-conscious, there is growing scrutiny on the sustainability of protein sources. Sustainable sourcing practices are essential, but they can be challenging to implement, particularly for animal-based proteins. Ensuring responsible sourcing practices while meeting demand can be a complex balancing act.

Regulatory Complexities

The food industry is subject to a web of regulations, and the protein ingredients market is no exception. Ensuring compliance with labeling, safety, and nutritional standards can be intricate and costly. Staying updated with evolving regulations is a continual challenge.

Allergen and Sensitivity Concerns

Food allergies and sensitivities are on the rise, and many protein ingredients, especially those derived from common allergenic sources like soy and nuts, can pose challenges for manufacturers. Ensuring products are free from allergenic contaminants is crucial but can be challenging to guarantee.

Key Market Trends

Plant-Based Proteins Dominate

The rise of plant-based proteins is expected to continue, with consumers increasingly opting for these alternatives due to health, environmental, and ethical concerns. Ingredients like pea protein, soy protein, and hemp protein will see continued growth as they play a central role in plant-based meat alternatives, dairy-free products, and plant-based protein supplements.

Sustainable Sourcing

Sustainability remains a top concern for consumers. The protein ingredients market will see a growing emphasis on sustainably sourced proteins, with a focus on reducing the environmental impact of protein production. This trend will drive innovation in plant-based protein sources and sustainable farming practices.

Innovative Protein Sources

The market will witness the emergence of innovative protein sources. Beyond traditional options, expect to see proteins derived from insects, algae, and microbial fermentation gaining traction. These sources offer unique nutritional profiles and sustainability benefits.

Protein Fortification

Protein fortification will extend beyond traditional protein products. A broader range of food and beverage categories, from snacks to beverages to baked goods, will feature protein fortification to meet the rising demand for protein intake in convenient, everyday formats.

Segmental Insights

Product Insights

Based on the category of Product, the animal/dairy protein category is projected to hold the largest share of revenue in 2022. This dominance of the animal protein segment is primarily fueled by its high-quality protein demand from various sectors, including food and beverage, animal feed, and personal care industries. Animal protein stands out as a complete protein source, containing all the essential amino acids required by the human body, making it a favored choice for individuals seeking to maintain a healthy lifestyle.

The appeal of animal proteins is further linked to their health benefits, which encompass improved muscle growth, weight management, and enhanced bone health in the United States. Additionally, the surging interest in functional foods and dietary supplements is driving the demand for animal protein, as it often serves as an ingredient in these products.

During the forecast period, the animal protein segment is anticipated to exhibit a moderate CAGR. Moreover, the animal feed industry serves as a significant consumer of animal protein ingredients, utilizing them as feed supplements to enhance livestock health and growth. Furthermore, the personal care sector incorporates animal protein as an ingredient in hair and skincare products, renowned for its ability to enhance hair and skin texture and appearance.

Application Insights

Based on the category of Application, the food and beverage sector took the lead in the market, boasting the largest share of revenue, and it's poised to maintain its dominance in the foreseeable future.

This dominance can be attributed to the increasing demand for functional foods among U.S. consumers, driven by a heightened awareness of health considerations. Consumers are now gravitating toward products that offer added functionalities. Notably, whey protein powders and protein bars are gaining popularity among both sports enthusiasts and fitness aficionados due to their high protein content and extended shelf life.

The upward trend in adopting whey proteins in packaged food items, confectionery, dietary supplements, and powders is expected to fuel the growth of protein ingredients in the functional foods and beverages category.

Another significant application of protein ingredients in the United States is in the realm

of animal feed. This segment is projected to exhibit the fastest CAGR throughout the forecast period. U.S. animal feed companies are actively promoting measures to reduce environmental emissions, which is likely to stimulate demand for alternative proteins in animal feed products. There is an emerging need to optimize animal feed premixes with proteins, especially those that are non-GMO.

Regional Insights

The North-East region is poised to dominate the United States Protein Ingredients Market for several compelling reasons. Firstly, this region is home to a burgeoning health-conscious population, with an increasing number of consumers prioritizing protein-rich diets for their numerous health benefits. Secondly, the North-East boasts a robust agricultural sector, providing access to a variety of protein sources, including soy, dairy, and legumes. Furthermore, the region's proximity to major metropolitan areas, such as New York and Boston, facilitates the distribution of protein ingredients to a vast consumer base. Additionally, the North-East has a thriving food and beverage industry, with a strong focus on innovation and product development, making it a hotspot for the incorporation of protein ingredients into a wide range of products. Lastly, the region's commitment to sustainability and environmental responsibility aligns with the growing demand for alternative protein sources, further solidifying its position as a dominant force in the United States Protein Ingredients Market.

Key Market Players

Cargill Inc

Archer-Daniels-Midland Co

Darling Ingredients Inc

Roquette Freres SA

Ingredion Inc

MycoTechnology Inc

Axiom Foods, Inc.

Farbest Foods Inc.

International Flavors & Fragrances Inc

Diversified Ingredients Inc

Report Scope:

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

United States Protein Ingredients Market, By Product:

Plant Proteins

Cereals

Legumes

Roots

Ancient Grains

Nuts & Seeds

Animal/Dairy Proteins

Egg Protein

Milk Protein Concentrates/Isolates

Whey Protein Concentrates

Whey Protein Hydrolysates

Whey Protein Isolates

Gelatin

Casein/Caseinates

Collagen Peptides

Microbe-based Protein

Algae

Bacteria

Yeast

Fungi

Insect Protein

Coleoptera

Lepidoptera

Hymenoptera

Orthoptera

Hemiptera

Diptera

Others

United States Protein Ingredients Market, By Application:

Food & Beverages

Infant Formulations

Clinical Nutrition

Animal Feed

Others

United States Protein Ingredients Market, By Region:

North-East

Mid-West

West

South

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the United States Protein Ingredients Market.

Available Customizations:

United States Protein Ingredients 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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