

# Milk Protein Book 2019

## The World Market for Milk Proteins 2018-2022

### Market rebalancing and positive future trend driven by health and nutrition

A new report on milk proteins from 3A Business Consulting, named *The World Market for Milk Proteins 2018-2022*, shows that the market for milk proteins will continue its volume growth. A better balance between supply and demand over the last year has improved prices. Limited milk supply growth and continued demand growth for dairy will help the market and provide the stimuli for future volume and value growth.

The world market for milk proteins continues to grow by 2-3% annually in volume terms, whereas the value has decreased given the price reduction over the period 2014-2018. However, the prices of the higher added-value milk ingredients, e.g. milk protein isolates and milk protein hydrolysates, have not shown the same reduction as the milk protein commodities such as casein and lower grades of milk protein concentrates. Currently, it is estimated that the world market for milk proteins is worth approx. USD 3.5 billion and amounts to approx. 675.000 MT in 2018. The biggest product categories are casein/caseinates followed by milk protein concentrates 42-85.

*"The main drivers for dairy remain intact - the world's population continues to grow, living standards are improving, dairy consumption is increasing especially in the Asian region, and consumers are increasingly being motivated to buy products from a health and nutrition perspective including products with a higher protein content"*, says Tage Affertsholt from 3A Business Consulting.

The report provides an overview of the current and expected future global market for milk proteins. It is global in scope, with a comprehensive regional analysis of the EU, North America, Latin America, Eastern Europe, Asia, Middle East & Africa and Oceania markets. Specifically, the report covers casein and caseinates, milk protein concentrates, milk protein isolates, total milk proteins, hydrolysed milk proteins, micellar casein, milk permeate powder as well as milk derived native whey proteins. The headlines are:

- Regional market size volume for milk proteins 2018-2022
- Milk protein demand per region
- Key company presentations
- Global survey of product launches containing milk proteins
- Product properties and applications
- World trade flows
- Investments and acquisitions

Asia including China is the single major dairy market for traditional milk powders in the world, however China is also rapidly catching up with the EU and the US regarding casein/caseinates and milk protein concentrates/isolates. Consumption of real high-end milk proteins is still dominated by the EU and the US.

Production of milk powders is huge in Oceania, EU and US and the production of casein/caseinates and the other milk proteins is also the domain of Oceania, the EU and the US.

Oceania and in particular New Zealand is playing the leading role in export trade followed by EU. For milk proteins, Asia, US and Middle East are the leading importing regions.

*"Hopefully, the information and analysis contained in this report will provide dairy and other food ingredient companies with an important navigational tool in their strategic planning process"*, says Tage Affertsholt, Managing Partner of 3A Business Consulting.

## Scope and objectives

The main objective of this report is to provide the reader with an overview of the current and expected future global market for milk proteins, based upon a comprehensive assessment and characterisation of production, product properties and utilisation, supply and demand as well as trade issues.

The areas covered in this report are:

- Regional market size forecasts for milk proteins 2018–2022
- Key company profiles
- Global survey of new product launches containing milk proteins
- Product properties and applications
- Production technology
- Global trade flows
- Investments, strategic alliances and Mergers & Acquisitions
- Industry trends, price analysis and outlook 2018–2022

The geographical scope and focus of the report is the global milk protein market, consisting of seven individual regional markets as per below:

- **EU–area (henceforth EU)**, consisting of EU–28 and the EFTA countries
- **North America**, consisting of the US and Canada
- **Oceania**, consisting of Australia and New Zealand
- **Latin America**, including all Middle– and South American countries
- **CIS–area (henceforth CIS)**, consisting of Belarus, Russia and Ukraine
- **Asia**, assessed as the major economies in the Asian region
- **Middle East and Africa**, assessed as major Middle East and African countries

The product scope and focus of this report is on the following milk proteins:

- Casein
- Caseinate
- Milk protein concentrate
- Milk protein isolate
- Micellar casein concentrate
- Micellar casein isolate
- Native whey

An examination of other milk proteins and milk permeate is presented in the final chapter of the report. These include:

- Milk protein hydrolysate
- Total milk protein
- Milk permeate

In order to offer an overview as representative as possible, different sources have provided the basis for this report. Because very few official statistics are available in relation to many of these products, a wide range of information has been gathered, analysed and integrated into a coherent document, facilitating what can be defined as a best estimate.

The *Milk Protein Book 2019* is considered by 3A Business Consulting as the best possible approximation in relation to global production, trade and utilisation of milk protein products.

### Time frame:

- 2014–2018 and 2018–2022

### Price

- The report is available in an electronic and/or hardcopy version and is priced at EUR 5,800.00.

### Timing

The report is published March 2019

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