
PROTEIN INGREDIENT MARKET

Science Market Regulation

UBIC
CONSULTING

2011



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SCIENCE - MARKET - REGULATION

This comprehensive report is based on in-depth interviews with food companies completed by a desk review. It provides for DECISION MAKERS a global understanding of the sector as well as an outlook on its future.



INTRODUCTION

OBJECTIVES M A R K E T

Consumption trends
by segments

Volumes of proteins
used by type and by
segments

Criteria of choice of
food companies

Proteins are assembled from their basic unit amino acids; about 20 to 22 amino acids are commonly found in proteins. Amino acids are classified into essential and non essential. There are nine essential amino acids required in the diet. As the human is not able to synthesize those amino acids they must come from the food.

In the anabolic process amino acids are linked together into body proteins which are constantly synthesized and degraded for energy recovery, cellular structure, enzymatic processes, antibody formation, blood-clotting factors, neurotransmitters, etc.

Proteins are used either for their nutritional value or their functional properties. Everybody needs food proteins. The amounts needed depend on one's body size, metabolism and period of life (growth, pregnancy, etc.)



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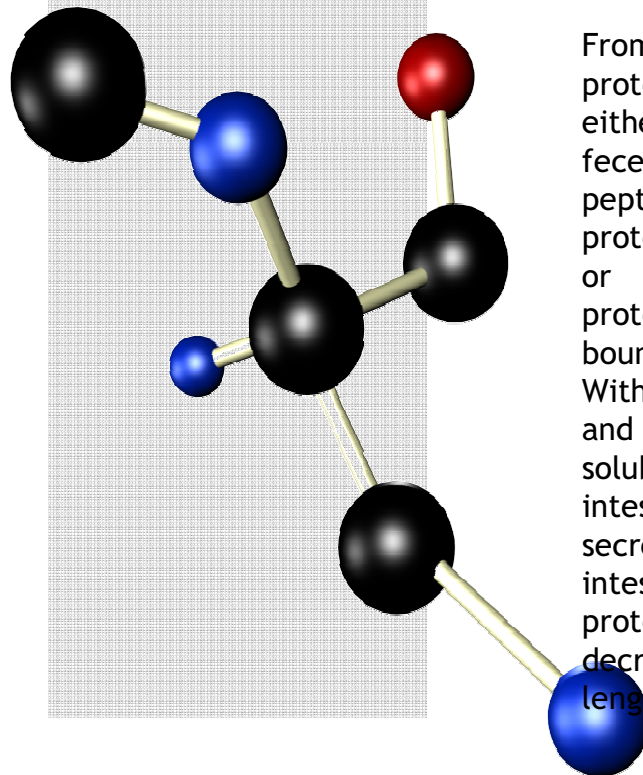
Extra protein beyond the daily requirement will not make extra muscle or grow hair faster or protect against diseases. Protein beyond what is needed is either broken down and used for energy or it is stored in fat cells. A too low protein diet will result in a gradual breakdown of body tissue protein, loss of muscle mass and metabolic disorders.

Proteins have different level of biological activity in the body. The main methods of evaluation are biological value and net protein utilization and protein digestibility corrected amino acid score (PDCAAS). Milk, eggs and meat are considered as the most valuable sources as they contain all essential amino acids. Egg white has a biological value of 100 which means that all the nitrogen from eggs can be used by the body. Plant proteins usually have a lower score (70 for corn).



BIOACTIVITY OF PROTEINS

During digestion, proteins are broken into amino acids and small peptides. Intact proteins are, for the most part, not absorbed across the gut wall. One exception would be a special class of milk-borne immunoglobulins (IgA) that are specifically absorbed and provide passive immunity to newborns and babies. A second exception is that very low levels of intact proteins or large fragments of proteins are taken up by mononuclear leukocytes, possibly through macropinocytosis, as part of the immune system surveillance of gut contents.



From a nutritional perspective, proteins are typically classified as either non-digestible (excreted in the feces) or digestible (absorbed as small peptides and amino acids). Digestible proteins are largely soluble in water or acid whereas the indigestible proteins are typically insoluble, being bound primarily to sugars or fiber. Within the stomach, hydrochloric acid and pepsin denature and fragment the soluble proteins. Later in the small intestine, protein-digesting enzymes secreted by the pancreas and intestinal wall further break down the protein chains into peptides of decreasing size, typically ranging in length from a few hundred amino

acids down to the component individual amino acids and extremely short peptides (two to six amino acids).

A study published by Robert et al (1999) demonstrated that the bioavailability of peptides was inversely proportional to the length of the AA chain. The digestive tract provides a strong barrier to macromolecules and all non essential AA are converted into carbon and nitrogen, as a source of energy or urea.

THE MARKET



The global proteins ingredients market is estimated at about \$10 billion. Proteins today are essential in nutritional sectors. The animal-derived protein market is now challenged by plant-derived proteins due to price differences and fluctuations but also consumer attitudes particularly as consumer are more convinced of the nutritional benefit of plant proteins. Soy protein represents a very competitive product in terms of price.

Its main market sector is the meat industry. Wheat proteins are mainly used in the baking food sector. This is still a small market but with an increasing number of applications. Dairy proteins still represent the main market and have a wide range of food applications. Meat protein represents the last category of products and has very important volumes.

APPLICATIONS

Market Sectors for proteins:

Dairy products / Ice creams
Infant formula- Clinical nutrition
Dietetic products & Sports Food
Confectionery & Chocolate
Beverages
Meat/pigmeat, ready-to-eat food
Bakery / Biscuits/ Snacks

TYPE OF PROTEIN

Wheat protein
Soy protein
Other vegetable proteins
Whey proteins
Meat-Fish proteins
Hydrolysates



METHODOLOGY

Quantitative

Volumes of different types of proteins broken down by geographical market

Type of proteins broken down by market segment

Qualitative

Main usage of each protein source

Comparative advantage of protein sources

Receptivity of different market segments and usage of protein sources



CONTENTS

1.1. introduction	8
Protein ingredient market	15
Soy Protein Market	20
Wheat Protein Market	23
Whey Proteins Market	33
The U.S. market	38
The E.U. market	40
Japan	46
China	48
India	48
1.4. Applications by market segments	49
Cheese	50
Vegetable Proteins Market	56
Meat-Fish Proteins Market	64
Egg Protein	
Cereal and Protein bars	72
Manufacturers	
FUJI PROTEIN TECHNOLOGIES INC. (JP)	58
FUJI OIL CO., LTD (JP)	59
THE NISSHIN OILIO GROUP, LTD. (JP)	60
ADM FAR EAST LTD. (JP)	62
SHOWA SANGYO CO., LTD. (JP)	62
KOYO MERCANTILE CO., LTD. (JP)	63
GELITA (G)	83
ROUSSELOT (VION, N)	86
NORLAND (USA)	88
STERLING GELATIN (IN)	90
PB GELATINS, TESSENDERLO GROUP (G)	92
SWIFTGEL	94
NITTA GELATIN (J)	96
GELATIN PRODUCTION	96
KEWPIE EGG CORPORATION (JP)	106
TAIYO KAGAKU CO.,LTD (JP)	107
DAIICHI-KASEI CO.,LTD.ALL CO.,LTD (JP)	108

3. FOOD SEGMENT SUMMARY – INGREDIENT USE	110
SEGMENT Dairy	111
SEGMENT Ice Cream	112
SEGMENT Bakery	113
SEGMENT Meats / Pork meat / Cured Meats	115
SEGMENT Confectionery	116
SEGMENT Ready to eat foods	117
3.1. Food Companies Usages	120
3.1.2. Dairy	121
ADAMS FOOD (IRISH DAIRY BOARD- UK)	122
AMERICAS CONFECTIONERY (CADBURY SCHWEPPE))	124
BEECHNUT (USA)	126
BEN & JERRY'S (UNILEVER GROUP - USA)	127
CARGILL JUICE BEVERAGE (USA)	128
DANNON (USA)	130
DEAN FOODS (USA)	132
GENERAL MILLS (USA)	135
MOLKEREI ALOIS MULLER GmbH (G)	138
UNILEVER GERMANY (LANGNESE IGLO) (G)	140
UNILEVER FRANCE (MIKO COGESAL) (F)	140
DANONE (F)	142
ELSA SA (CH)	144
MEIJI MILK PRODUCTS CO, LTD (J)	147
HERSHEY FOODS (USA)	150
INTERSTATE BAKERIES CORPORATION (USA)	153
NESTLE ICE CREAM (F)	155
NESTLE USA Frozen Food Production Plant, Jonesboro, AR, USA	
NESTLE (CH)	160
NELSON'S NUTRACEUTICALS (USA)	163
NESTLE UK (ROWNTREE MACKINTOSH - UK)	165
SAMMONTANA S.r.l (I)	167
UNILEVER (NL)	168
WELLS' DAIRY Inc (Blue Bunny Brand) (USA)	170
ZOTT (G)	171
3.1.3. Meat / Prepared meals / Sauces	172
CAMPOFRIO Alimentacion (SP)	173
HEINZ (UK)	175
HEINZ (USA)	177
NANJING YURUN FOOD CO LTD (CN)	179
NESTLE USA Frozen Food Production Plant, Jonesboro, AR (USA)	
OSCAR MAYER (KRAFT FOODS- USA)	185
SHINEWAY GROUP TECHNOLOGY CENTER (CN)	187

3.1.4. Bakery / Biscuits	190		
INTERSTATE BAKERIES CORPORATION (USA)	192	SLIM FAST FOOD UNILEVER (UK)	265
NABISCO Biscuits Co (KRAFT FOODS - USA)	194	SHANNON MINERALS (IRL)	267
GRANDS MOULINS DE PARIS (F)	197	SOBAL / LABORATOIRES PYC (SAVENA GROUP- F)	269
QUAKER OATS (PEPSICO GROUP - USA)	199	NUTRICHEM DIAET + PHARMA GmbH (G)	270
3.1.5. Confectionery	201	NUTRISUN (TRIBALLAT GROUP - F)	272
AMERICAS CONFECTIONERY (CADBURY SCHWEPPES - USA)	202	PRINSEN BV (NL)	274
HERSHEY FOODS (USA)	205	UNILEVER BESTFOODS (USA)	277
MARS (MASTERFOOD - NL)	208	VSI BV (NL)	278
NESTLE UK (ROWNTREE MACKINTOSH - UK)	210	WRIGHT group (USA)	280
3.1.6. Beverages	212	4.1. PRODUCT CLASSIFICATION	282
CARGILL JUICE BEVERAGE (USA)	213	4.1.1. USA	283
3.2. Nutritional Companies	215	4.1.2. Europe	285
ABBOTT NUTRITIONALS (USA)	216	4.1.3. Japan	286
BEECHNUT (USA)	218	4.2. STATISTICS ON THE MARKET	287
FRESENIUS KABI ENTERAL NUTRITION (G)	219	4.2.1. The US Market	288
MEAD JOHNSON (USA)	221	4.2.2. Canada	296
WYETH (USA)	226	4.2.3. MEXICO	297
MORINAGA (J)	228	4.2.4. New Zealand	298
NESTLE MEDICAL NUTRITION (CH)	229	4.2.5. Australia	299
3.3. Sports Food & Slimming products	233	4.2.6. European Trade Statistics (Imports - Exports) - Year 2010 - EUR27 /	
MPC – MPI Ingredient use	234	all Partners	300
Key Factors	234		
BARIATRIX EUROPE (CDN)	234		
CAMBRIDGE MANUFACTURING COMPANY Ltd (CMC) (UK)	235		
D3F / NUTRIBIO (F)	239		
EAS (Experimental & Applied Sciences- Abbott Nutritionals- USA)	241		
ELEMENT BARS (USA)	242		
GEFA LABORATORY (F)	243		
HEDELAB (B)	243		
INKO SA	243		
JOE WEIDER NUTRITION (USA)	247		
LABORATOIRE ROBERT SCHWARTZ	249		
LABORATOIRE INELDEA (F)	251		
NBTY (USA)	252		
NELSON'S NUTRACEUTICALS (USA)	254		
MLO Sports Nutrition (USA)	256		
NUTRIBIO (F)	258		
PHARMA SWEET COMPANY (F)	259		
PRODIETIC	261		
NUTRILITE PRODUCTS, Inc – ACCESS BUSINESS GROUP (USA)	263		

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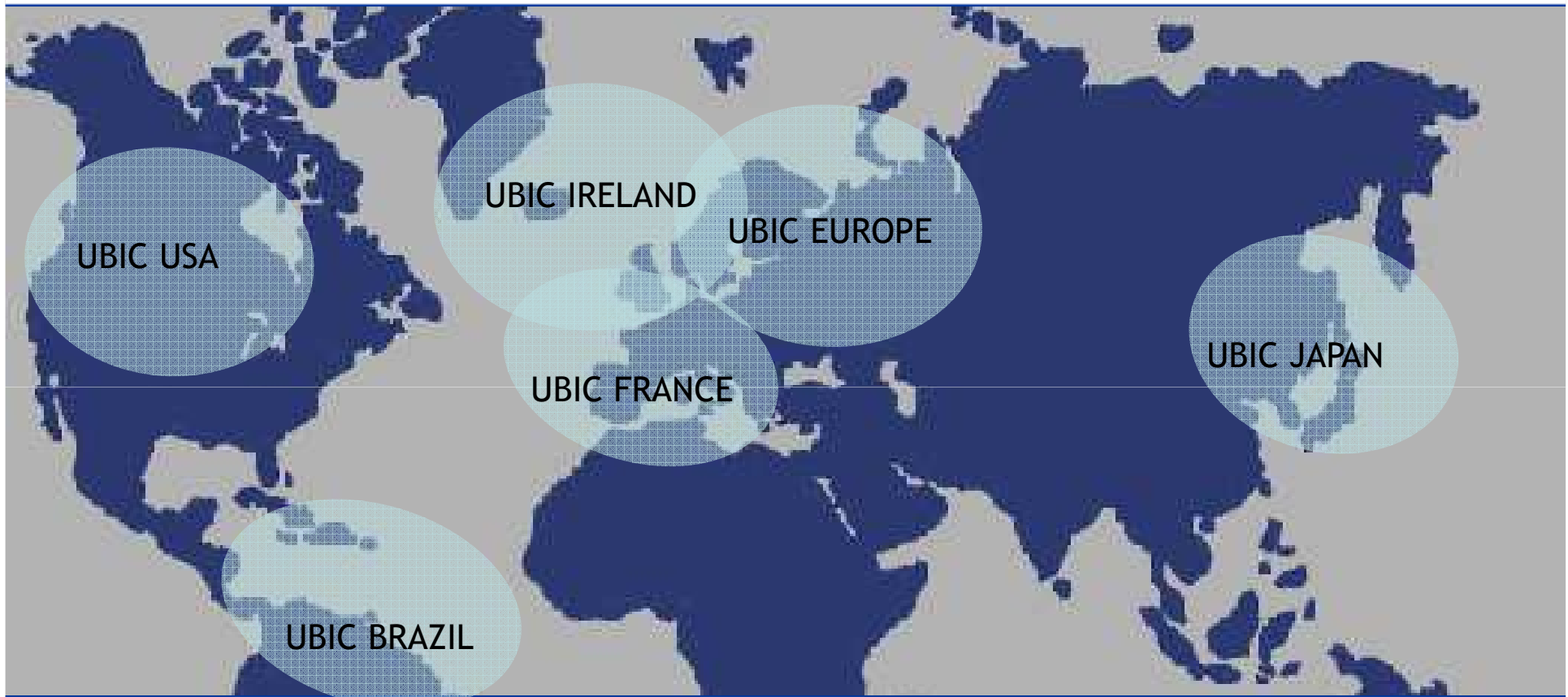
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