

# Global Whey Permeate Market 2026

Market size, segmentation, competitive landscape and outlook

2021-2031

## Moving forward, together



Every one of us has, at some point, heard the line from *Alice in Wonderland*: “It takes all the running you can do, to keep in the same place. If you want to get somewhere else, you must run at least twice as fast.” Cliché as the quote has become, our world is changing at extraordinary speed. And yet, to my mind, it matters not only to run fast, but — more importantly — to know where you are running.

We see ourselves as the navigator, ready at the right moment to point out the correct course. By providing current, timely information for the decisions that matter, we aim to protect our clients from missteps and to help them find new opportunities.

It matters to us that you are satisfied with the work we have done. If you have any questions about this report, we will be glad to answer them.

**ANDREY SHEVCHENKO,** Managing Partner

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# Market at a glance

This demo shows the **form and depth** of the report — real narrative with the detailed figures and tables masked as “XXX”. When you order the report, every figure is finalised and verified for your copy, and the full report is delivered within 24–72 hours.

| Indicator | Value |
|---|---|
| Market size (2025) | USD 1.2 bn |
| Forecast (2031) | USD 1.8 bn |
| CAGR (2021-2031) | 6.9% |
| Study period | 2021-2031 |
| Largest region | Europe · 34.8% |
| Fastest-growing region | Asia-Pacific · 8.7% |
| Market concentration | Moderate |
| Licence | Individual / Company |

The global whey permeate market reached USD XXX billion in 2025 and will expand to USD XXX billion by 2031, advancing at a XX% CAGR. Growth is being driven by rising whey-protein production, greater recovery of dairy side streams, and the use of permeate as a cost-efficient source of lactose, minerals, browning, and dairy solids in food and feed formulations. Europe accounted for XX% of 2025 revenue, while Asia-Pacific will record the fastest regional CAGR at XX%. Food-grade powder is gaining value share as manufacturers invest in crystallization, spray-drying, demineralization, and application support for bakery, confectionery, dairy, savory, and nutritional products.

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# Executive summary

The global whey permeate market reached USD XXX billion in 2025 and will expand to USD XXX billion by 2031, advancing at a XX% CAGR. Growth is being driven by rising whey-protein production, greater recovery of dairy side streams, and the use of permeate as a cost-efficient source of lactose, minerals, browning, and dairy solids in food and feed formulations. Europe accounted for XX% of 2025 revenue, while Asia-Pacific will record the fastest regional CAGR at XX%. Food-grade powder is gaining value share as manufacturers invest in crystallization, spray-drying, demineralization, and application support for bakery, confectionery, dairy, savory, and nutritional products.

| Indicator | Value |
|---|---|
| Market size 2025 | XXX |
| Forecast 2031 | XXX |
| CAGR | XXX |
| Largest region | XXX |
| Fastest region | XXX |

## Key findings

- The global whey permeate market generated USD XXX billion in 2025 and will reach USD XXX billion in 2031.
- Global market volume totaled XXX metric tons in 2025 and will rise to XXX metric tons by 2031.
- Europe held XX% of global revenue in 2025, supported by its large cheese-processing base and established whey-fractionation infrastructure.
- Asia-Pacific will grow at an XX% CAGR through 2031 as feed formulators and food manufacturers increase their use of economical dairy solids.
- Powder represented XX% of market value in 2025 because it offers longer shelf life, lower freight complexity, and broader exportability than liquid permeate.
- Animal feed and pet nutrition accounted for XX% of 2025 demand, while food and beverage applications will expand at an XX% CAGR.
- Eurostat reported that EU dairies produced XXX metric tons of cheese and XXX metric tons of whey in liquid-whey equivalent during 2024.
- U.S. Dairy Export Council data show that U.S. low-protein whey exports reached XXX metric tons in 2024, rising XX% year over year.

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# Market size and forecast

### Market value by year, USD bn

| Indicator | 2026 | 2027 | 2028 | 2029 | 2030 | 2031 | CAGR |
|---|---|---|---|---|---|---|---|
| Market value, USD bn | XXX | XXX | XXX | XXX | XXX | XXX | XXX |
| Market volume | XXX | XXX | XXX | XXX | XXX | XXX | XXX |
| Production | XXX | XXX | XXX | XXX | XXX | XXX | XXX |
| Imports | XXX | XXX | XXX | XXX | XXX | XXX | XXX |
| Exports | XXX | XXX | XXX | XXX | XXX | XXX | XXX |
| Apparent consumption | XXX | XXX | XXX | XXX | XXX | XXX | XXX |

*Source: XXX*

### Year-over-year value change

| Indicator | 2027 | 2028 | 2029 | 2030 | 2031 | CAGR |
|---|---|---|---|---|---|---|
| Market value | X% | X% | X% | X% | X% | X% |
| Production | X% | X% | X% | X% | X% | X% |
| Imports | X% | X% | X% | X% | X% | X% |
| Exports | X% | X% | X% | X% | X% | X% |

*Source: XXX*

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# Global Whey Permeate Market Trends and Growth Drivers

Whey permeate economics begin with the protein market. Ultrafiltration transfers lactose, soluble minerals, water, and low-molecular-weight components into the permeate stream while retaining valuable protein; the profitability of the entire fractionation system therefore depends on finding reliable, higher-value outlets for both streams.

Supply is tied to cheese manufacture and protein concentration, but market value is determined by the processor's ability to stabilize the lactose, remove water efficiently, and deliver consistent sensory and physical properties. Plants with adequate evaporation, crystallization, spray-drying, heat-recovery, and storage infrastructure can access international food markets, while underinvested facilities remain dependent on local liquid feed or lower-value disposal routes.

Demand is broadening beyond its traditional role as an economical feed carbohydrate. Food formulators increasingly use permeate to contribute browning, dairy flavor, minerals, solids, and mild sweetness in bakery, confectionery, savory, and powdered applications, creating a widening price and margin gap between standardized food-grade powder and commodity feed material.

## Growth drivers

### Whey-protein capacity creates a larger permeate stream

Every expansion in whey protein concentrate or isolate production generates a corresponding lactose- and mineral-rich permeate stream. Integrated processors are installing evaporation, crystallization, and drying capacity to turn that stream into a saleable ingredient, increasing both addressable supply and commercial market depth.

### Cost-efficient dairy solids gain formulation share

Whey permeate supplies lactose, milk minerals, dairy flavor, and solids at a lower formulation cost than many combinations of lactose, whey powder, skim milk powder, and salt. Bakery, confectionery, soup, seasoning, and beverage-powder producers use it to control cost while maintaining browning, texture, and flavor performance.

### Asian feed demand expands the volume base

Feed-grade permeate provides readily fermentable carbohydrate and dairy minerals for piglet, calf, aquaculture, and pet-food applications. Expansion of compound-feed production and recovery in Asian livestock systems will raise import demand for competitively priced powder.

### Food-grade drying lifts market value

New dryers and tighter crystallization control allow processors to convert liquid or feed-oriented streams into stable food-grade powders. The transition increases realizable value per metric ton and opens applications requiring controlled microbiology, solubility, flavor, and particle-size distribution.

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### Clean-label functionality supports reformulation

Permeate promotes Maillard browning, contributes mild dairy sweetness, enhances savory flavor, and supplies native milk minerals. These functions support simpler ingredient declarations and partial sodium or sweetener reduction in selected recipes without adding a specialized flavor system.

### Circular dairy processing attracts capital

Processors are prioritizing full utilization of whey streams to reduce organic load, disposal expenditure, and lost solids. Water recovery, anaerobic digestion, heat integration, and permeate drying increasingly form a single investment case built around yield, sustainability, and revenue.

## Restraints

### Energy-intensive concentration pressures margins

Liquid permeate contains substantial water and must be concentrated, crystallized, and dried before economical long-distance shipment. Electricity, steam, and natural-gas costs therefore have an outsized effect on conversion margins, particularly at smaller or intermittently loaded plants.

### Commodity volatility disrupts purchasing

Whey permeate competes with lactose, dry whey, dextrose, molasses, and other carbohydrate or dairy-solid ingredients. Rapid changes in relative prices encourage reformulation and contract renegotiation, limiting suppliers' ability to sustain premiums without differentiated quality.

### Hygroscopic powder complicates handling

The high lactose and mineral content of permeate creates crystallization, caking, and flowability challenges when drying or storage conditions are poorly controlled. Buyers demand reliable agglomeration, moisture management, packaging barriers, and shelf-life performance, raising the qualification threshold for smaller suppliers.

### Market-access rules fragment specifications

Food, feed, allergen, microbiological, and non-retail labeling requirements differ across importing jurisdictions. Exporters must manage product registration, dairy-establishment approval, certificates, traceability, and customer-specific contaminant limits, increasing the cost of serving smaller markets.

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# Whey Permeate Market Driver and Restraint Impact on the Forecast

### Drivers — impact on forecast

| Driver | Impact on CAGR | Geography | Horizon |
|---|---|---|---|
| Whey-protein capacity creates a larger permeate stream | XXX | XXX | XXX |
| Cost-efficient dairy solids gain formulation share | XXX | XXX | XXX |
| Asian feed demand expands the volume base | XXX | XXX | XXX |
| Food-grade drying lifts market value | XXX | XXX | XXX |
| Clean-label functionality supports reformulation | XXX | XXX | XXX |
| Circular dairy processing attracts capital | XXX | XXX | XXX |

*Source: XXX*

### Restraints — impact on forecast

| Restraint | Impact on CAGR | Geography | Horizon |
|---|---|---|---|
| Energy-intensive concentration pressures margins | XXX | XXX | XXX |
| Commodity volatility disrupts purchasing | XXX | XXX | XXX |
| Hygroscopic powder complicates handling | XXX | XXX | XXX |
| Market-access rules fragment specifications | XXX | XXX | XXX |

*Source: XXX*

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# Whey Permeate Market Segmentation by Form, Grade and Application

## By Form

Powder commands the market because crystallized, spray-dried material can be stored, exported, blended, and dosed through conventional dry-ingredient systems. Liquid concentrate remains economically attractive near large feed mills, fermentation plants, and food-processing clusters but is constrained by water content and transport radius. Agglomerated and controlled-particle powders will outgrow standard powder as food customers demand better dispersibility and handling.

**Value by form, USD bn**

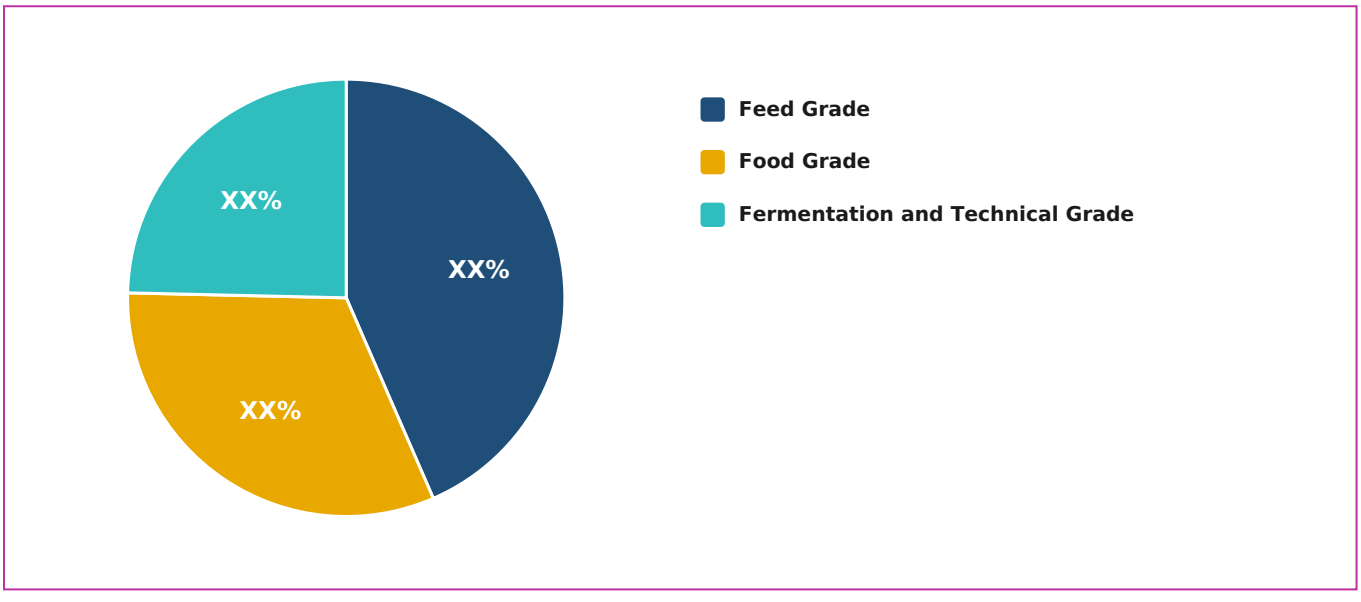
| Segment | 2026 | 2027 | 2028 | 2029 | 2030 | 2031 | Share 2025 | CAGR |
|---|---|---|---|---|---|---|---|---|
| Powder | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |
| Liquid and Concentrated Liquid | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |

*Source: XXX*

## By Grade

Feed grade remains the largest outlet because it absorbs substantial tonnage with broader sensory and specification tolerances. Food-grade material earns a premium through tighter control of microbiology, color, flavor, moisture, solubility, and foreign matter. Fermentation and technical grades form a smaller but fast-developing category as manufacturers convert lactose-rich streams into organic acids, ethanol, yeast biomass, and other bioproducts.

**Value share by grade, 2025**




*Source: XXX*

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**Value by grade, USD bn**

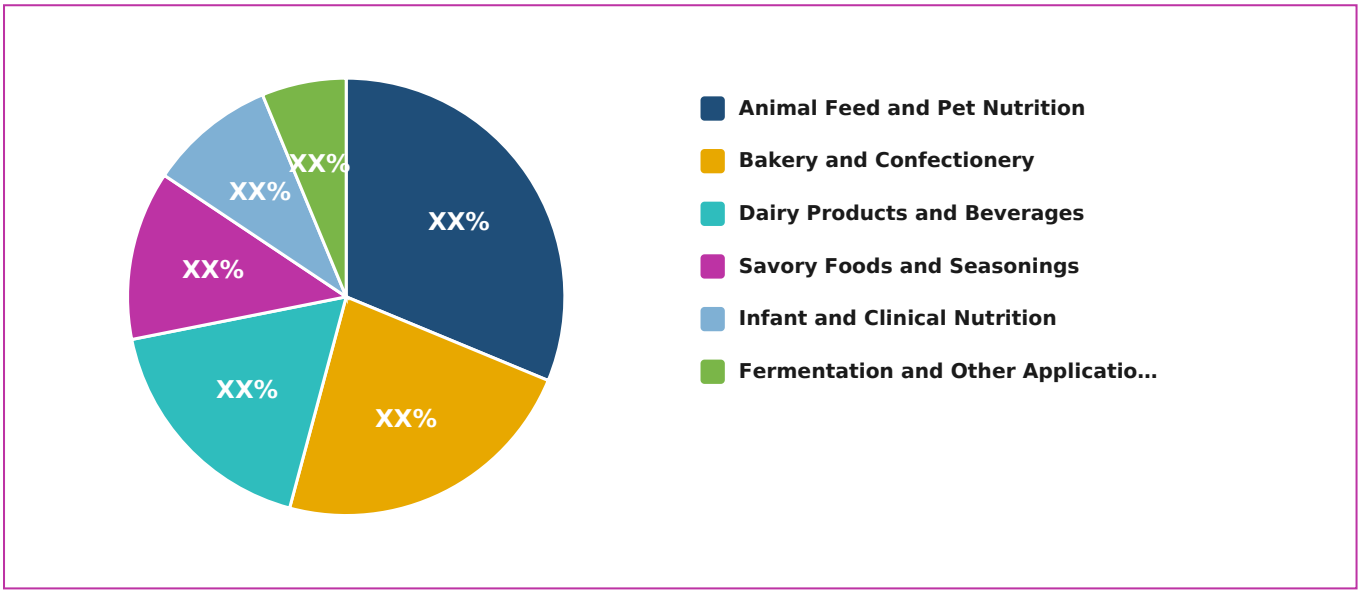
| Segment | 2026 | 2027 | 2028 | 2029 | 2030 | 2031 | Share 2025 | CAGR |
|---|---|---|---|---|---|---|---|---|
| Feed Grade | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |
| Food Grade | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |
| Fermentation and Technical Grade | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |

*Source: XXX*

## By Application

Animal nutrition is the primary volume outlet, particularly in piglet, calf, compound-feed, and pet-food recipes. Bakery and confectionery use permeate for dairy solids, browning, flavor, and partial replacement of lactose or milk powders. Savory foods, beverages, and fermentation will gain share as suppliers provide more consistent food-grade powders and application-specific guidance.

**Value share by application, 2025**




*Source: XXX*

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**Value by application, USD bn**

| Segment | 2026 | 2027 | 2028 | 2029 | 2030 | 2031 | Share 2025 | CAGR |
|---|---|---|---|---|---|---|---|---|
| Animal Feed and Pet Nutrition | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |
| Bakery and Confectionery | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |
| Dairy Products and Beverages | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |
| Savory Foods and Seasonings | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |
| Infant and Clinical Nutrition | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |
| Fermentation and Other Applications | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |

*Source: XXX*

## By Source Whey

Sweet whey generated by rennet-coagulated cheese provides the largest and most standardized feedstock for membrane processing. Its flavor and mineral balance make it the preferred source for broad food and feed use. Acid-whey permeate is expanding from a smaller base as processors develop neutralization, mineral-management, fermentation, and local feed solutions for yogurt, cottage-cheese, and fresh-cheese side streams.

**Value by source Whey, USD bn**

| Segment | 2026 | 2027 | 2028 | 2029 | 2030 | 2031 | Share 2025 | CAGR |
|---|---|---|---|---|---|---|---|---|
| Sweet-Whey Permeate | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |
| Acid-Whey Permeate | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |

*Source: XXX*

## By Sales Channel

Large food, feed, and pet-nutrition manufacturers generally procure directly through annual or multi-year contracts tied to specification and delivery programs. Distributors and traders remain essential for containerized exports, smaller customers, credit provision, stockholding, and markets requiring import expertise. Digital and spot channels will improve price transparency but will remain secondary for qualified food-grade contracts.

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**Value by sales Channel, USD bn**

| Segment | 2026 | 2027 | 2028 | 2029 | 2030 | 2031 | Share 2025 | CAGR |
|---|---|---|---|---|---|---|---|---|
| Direct Sales | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |
| Distributors and Ingredient Traders | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |
| Digital and Spot Channels | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |

*Source: XXX*

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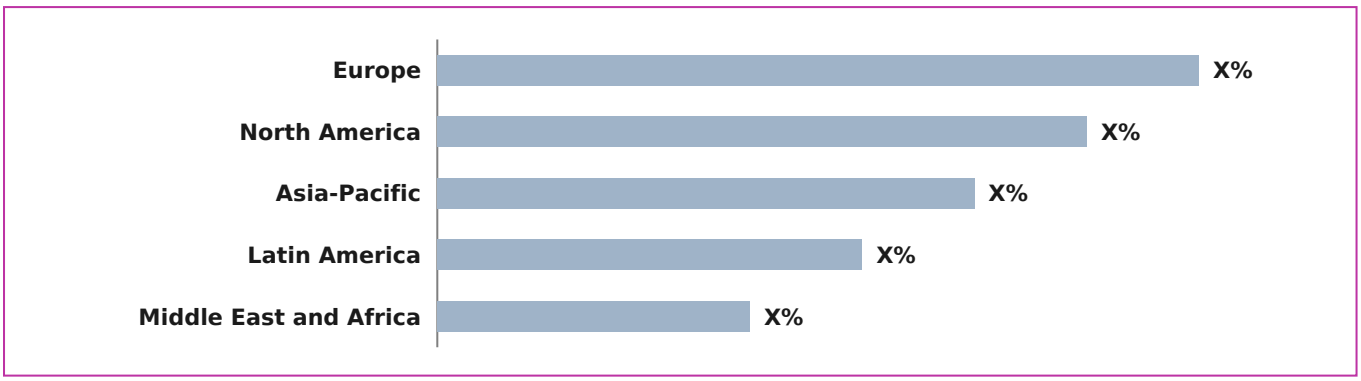
# Whey Permeate Market Regional Analysis and Country Outlook

Europe generated XX% of global whey permeate revenue in 2025. Germany, France, the Netherlands, Denmark, Ireland, and Poland combine large cheese and whey-processing systems with established food-ingredient exporters, while the region's high energy costs reinforce the importance of heat integration and premium food-grade output. Eurostat's 2024 total of XXX metric tons of EU cheese production and XXX metric tons of whey in liquid-whey equivalent demonstrates the scale of the recoverable raw-material base.

North America accounted for XX% of 2025 value and remains the largest export-oriented production hub for feed and food permeate. U.S. cheese expansion, extensive membrane-processing assets, and established sales into Mexico, China, Southeast Asia, and other feed markets support volume. New cheese capacity in the U.S. Plains and Southwest increases permeate availability, while technical-service programs are shifting incremental output toward bakery, confectionery, dairy, and pet-food uses.

Asia-Pacific will lead growth at an XX% CAGR, increasing its global share from XX% in 2025 to XX% in 2031. China remains central to low-protein whey trade, while Indonesia, Vietnam, Thailand, the Philippines, and India provide faster growth through feed, confectionery, bakery, and recombined dairy demand. Latin America also gains strategic importance as Argentina and Brazil add whey-processing capacity and regional food producers seek lower-cost dairy solids.

**Growth rate by region, 2025-2031**




*Source: XXX*

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**Market value by region, USD bn**

| Region | 2026 | 2027 | 2028 | 2029 | 2030 | 2031 | Share 2025 | CAGR |
|---|---|---|---|---|---|---|---|---|
| Europe | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |
| North America | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |
| Asia-Pacific | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |
| Latin America | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |
| Middle East and Africa | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |

*Source: XXX*

**Market value by leading country, USD bn**

| Country | 2025 | 2031 | Share 2025 | CAGR |
|---|---|---|---|---|
| United States | XXX | XXX | XXX | XXX |
| Germany | XXX | XXX | XXX | XXX |
| United Kingdom | XXX | XXX | XXX | XXX |
| Belgium | XXX | XXX | XXX | XXX |
| Netherlands | XXX | XXX | XXX | XXX |
| Japan | XXX | XXX | XXX | XXX |
| China | XXX | XXX | XXX | XXX |
| Mexico | XXX | XXX | XXX | XXX |

*Source: XXX*

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# Whey Permeate Market Competitive Landscape and Company Share

The whey permeate market is moderately concentrated: the ten largest suppliers held XX% of 2025 revenue. Arla Foods Ingredients, Lactalis Ingredients, Proliant Dairy Ingredients, Agropur, Saputo, Glanbia, FrieslandCampina Ingredients, Hilmar, Leprino Foods, and Dairygold benefit from access to large cheese or whey streams, while traders and regional processors extend their geographic reach.

Competition turns on raw-material security, drying scale, microbiological consistency, lactose crystallization, color, flavor, flowability, and delivered logistics. Suppliers able to certify food-grade material across multiple plants command stronger customer retention than operators reliant on feed outlets. Application laboratories increasingly support substitution trials in chocolate, baked goods, seasonings, dairy beverages, and powdered mixes.

Recent strategic activity is enlarging both protein and permeate platforms. Arla Foods Ingredients completed its acquisition of Volac's Whey Nutrition business in 2024 and is commissioning an Argentine dryer designed to more than double Porteña's permeate-powder capacity. Hilmar's Dodge City facility expands the U.S. cheese-and-whey processing base, while circular-processing projects are creating new fermentation and feed pathways for lower-value liquid streams.

**Leading companies**

| Company | HQ | Est. revenue 2025 | Market share 2025 | YoY |
|---|---|---|---|---|
| Arla Foods Ingredients | XXX | XXX | XXX | XXX |
| Lactalis Ingredients | XXX | XXX | XXX | XXX |
| Proliant Dairy Ingredients | XXX | XXX | XXX | XXX |
| Agropur | XXX | XXX | XXX | XXX |
| Saputo | XXX | XXX | XXX | XXX |
| Glanbia | XXX | XXX | XXX | XXX |
| FrieslandCampina Ingredients | XXX | XXX | XXX | XXX |
| Hilmar | XXX | XXX | XXX | XXX |
| Leprino Foods | XXX | XXX | XXX | XXX |
| Dairygold Food Ingredients | XXX | XXX | XXX | XXX |

*Source: XXX*

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# Whey Permeate Market Forecast and Commercial Opportunities

The market will add approximately USD XXX million and XXX metric tons between 2025 and 2031. Growth will increasingly separate into a high-volume feed market and a faster-growing food-grade market built around standardized sensory performance, controlled mineral profiles, and customer-specific functionality.

The central forecast assumes steady global cheese growth, continued investment in high-protein whey ingredients, normalized energy costs, and increasing Asian import demand. A stronger food-grade conversion cycle would move 2031 value above USD XXX billion, while prolonged weak livestock economics and high drying costs would keep the market closer to USD XXX billion.

Winning suppliers will integrate protein and permeate economics, secure multiple drying locations, document product origin and composition, and provide formulation support rather than selling solely on lactose content. Customized permeates for chocolate, bakery, savory foods, pet nutrition, and fermentation will produce the strongest margin expansion.

## Opportunities

- Food-grade conversion of permeate currently sold into feed
- Customized low-mineral and application-specific permeate systems
- Fermentation substrates for lactic acid, ethanol, yeast, and biochemicals
- Premium pet-food and palatability applications
- Regional drying capacity in Latin America and Asia
- Carbon-footprint reduction through heat recovery and water reuse

> This preview shows the form and depth of the report. The full report contains every figure, segment- and country-level detail and full company profiles. On purchase all figures are finalised and verified, and the report is delivered within 24–72 hours.

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