

Global Casein 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

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Indicator	Value
Market size (2025)	USD 3.2 bn
Forecast (2031)	USD 4.8 bn
CAGR (2021-2031)	6.8%
Study period	2021-2031
Largest region	Europe · 34.8%
Fastest-growing region	Asia-Pacific · 8.5%
Market concentration	Moderate
Licence	Individual / Company

The global casein market reached USD XXX billion in 2025 and will expand to USD XXX billion by 2031, advancing at a XX% CAGR. Demand is shifting from conventional dairy processing toward higher-value sports nutrition, medical nutrition, fortified foods and functional beverage systems. Europe accounted for XX% of 2025 revenue, while Asia-Pacific will post the fastest regional CAGR at XX%. Supply leadership remains concentrated in New Zealand and Western Europe, but product-level competition is intensifying around native micellar casein, customized caseinates and application-specific functionality.

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Executive summary

The global casein market reached USD XXX billion in 2025 and will expand to USD XXX billion by 2031, advancing at a XX% CAGR. Demand is shifting from conventional dairy processing toward higher-value sports nutrition, medical nutrition, fortified foods and functional beverage systems. Europe accounted for XX% of 2025 revenue, while Asia-Pacific will post the fastest regional CAGR at XX%. Supply leadership remains concentrated in New Zealand and Western Europe, but product-level competition is intensifying around native micellar casein, customized caseinates and application-specific functionality.

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

Key findings

- Global casein market revenue reached USD XXX billion in 2025 and will reach USD XXX billion in 2031.
- Global commercial casein demand totaled XXX metric tons in 2025 and will reach XXX metric tons by 2031.
- Europe held XX% of global market value in 2025, supported by its concentrated dairy-processing base and established food-ingredient customers.
- Asia-Pacific will grow at an XX% CAGR through 2031 as sports nutrition, clinical nutrition and protein-fortified foods scale in China, India and Southeast Asia.
- Rennet casein generated XX% of 2025 revenue, retaining leadership through processed-cheese, analogue-cheese and technical food applications.
- Food and beverage processing represented XX% of market revenue, while sports and performance nutrition will record the fastest application CAGR at XX%.
- New Zealand exported XXX.2 metric tons of HS 350110 casein worth USD XXX million in 2024, according to UN Comtrade data disseminated through World Bank WITS.
- U.S. casein import volume declined XX% between 2019 and 2024, while caseinate imports increased XX%, according to the U.S. International Trade Commission.

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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 Casein Market Trends and Growth Drivers

Casein sits at the intersection of dairy commodity economics and specialty-protein formulation. Its supply responds to skim-milk values and processors' returns from alternative solids streams, while its realized price depends on purity, mineral profile, microbiological quality, solubility and application performance. This creates a market in which volume can remain constrained even while value rises through product mix.

The demand center is moving toward nutrition without displacing traditional food uses. Processed cheese and industrial formulations keep rennet and acid casein plants loaded, but sports nutrition, medical beverages and healthy-ageing products generate the strongest incremental margins. Micellar casein and tailored caseinates therefore attract a growing share of capital expenditure and technical-service resources.

Regional competitiveness is determined by milk access, processing scale and customer proximity. New Zealand remains a pivotal exporter, Europe supplies a diverse portfolio of functional grades, and North America absorbs substantial imported material. Asia-Pacific is becoming the key battleground for technical sales as local manufacturers move from commodity protein fortification toward application-specific performance.

Growth drivers

Sports nutrition moves beyond whey

Casein's slow amino-acid release profile supports overnight, recovery and sustained-satiety positioning in powders, bars and ready-to-drink products. Brand owners are increasingly pairing casein with whey to create differentiated digestion and texture claims, raising both inclusion rates and average selling prices.

Mainstream food protein fortification

Bakeries, beverage formulators and snack manufacturers are moving protein claims from specialist channels into everyday consumption occasions. Caseinates provide emulsification, water binding and nutritional density in a single ingredient, improving their economics in multifunctional formulations.

Clinical nutrition and healthy ageing

Ageing populations and higher treatment intensity are expanding demand for compact, protein-dense oral nutritional supplements and enteral feeds. Native micellar casein and high-purity caseinates are gaining because they support sustained protein delivery, heat processing and neutral sensory profiles.

Processed-cheese functionality

Rennet casein remains a core structural protein in processed and analogue cheese systems, particularly where manufacturers require stretch, melt control and cost-efficient solids management. Urbanization and foodservice expansion sustain demand in markets where pizza, quick-service restaurants and convenience foods are growing rapidly.

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Native micellar casein premiumization

Membrane filtration allows suppliers to preserve the native protein structure and differentiate products through low denaturation, micellar calcium and improved nutritional positioning. The resulting price premium is moving market value faster than tonnage in advanced nutrition applications.

Asian formulated-nutrition investment

New capacity in sports beverages, adult nutrition and medical foods is creating demand for highly soluble dairy proteins with documented quality and traceability. Suppliers establishing regional technical centers and distributor inventories are capturing shorter development cycles and higher customer retention.

Restraints

Milk-cost and solids-allocation volatility

Casein competes with skim milk powder, milk protein concentrate and cheese streams for the same milk solids. Changes in farmgate milk prices and relative commodity returns can quickly alter production allocation, contract pricing and export availability.

Substitution by whey and complete milk proteins

Whey isolates, milk protein isolates and concentrates can deliver stronger solubility or a broader protein profile in selected formulations. Substitution is most pronounced in beverages where dispersibility and low viscosity outweigh casein's slow-digestion proposition.

Allergen and label complexity

Casein is a milk-derived allergen and must be declared under major-market food-labeling regimes. Reformulation toward allergen-free or vegan claims reduces the addressable market in selected bars, beverages and convenience foods.

High technical barriers for premium grades

Low-spore, heat-stable and medical-nutrition grades require advanced filtration, hygienic design, drying control and extensive customer qualification. These requirements lengthen commissioning cycles and constrain rapid capacity additions by smaller processors.

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Casein Market Driver and Restraint Impact on the Forecast

Drivers — impact on forecast

Driver	Impact on CAGR	Geography	Horizon
Sports nutrition moves beyond whey	XXX	XXX	XXX
Mainstream food protein fortification	XXX	XXX	XXX
Clinical nutrition and healthy ageing	XXX	XXX	XXX
Processed-cheese functionality	XXX	XXX	XXX
Native micellar casein premiumization	XXX	XXX	XXX
Asian formulated-nutrition investment	XXX	XXX	XXX

Source: XXX

Restraints — impact on forecast

Restraint	Impact on CAGR	Geography	Horizon
Milk-cost and solids-allocation volatility	XXX	XXX	XXX
Substitution by whey and complete milk proteins	XXX	XXX	XXX
Allergen and label complexity	XXX	XXX	XXX
High technical barriers for premium grades	XXX	XXX	XXX

Source: XXX

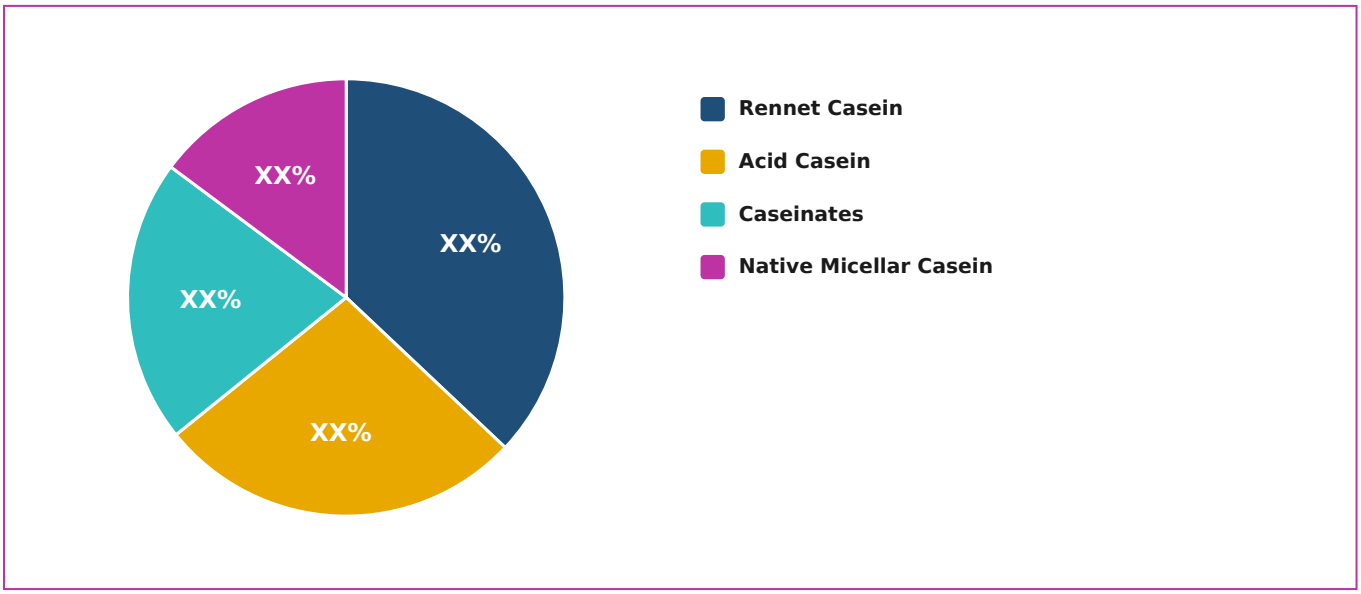
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Casein Market Segmentation Analysis by Product, Application, Grade and Form

By Product Type

Rennet casein leads through its structural performance in processed cheese, analogue cheese, plastics and technical binders. Acid casein maintains a broad position in nutrition, food processing and downstream caseinate production. Caseinates command higher unit values through solubility and emulsification, while native micellar casein is expanding fastest as medical and sports nutrition formulators prioritize minimally denatured protein.

Value share by product Type, 2025



Source: XXX

Value by product Type, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Rennet Casein	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Acid Casein	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Caseinates	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Native Micellar Casein	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

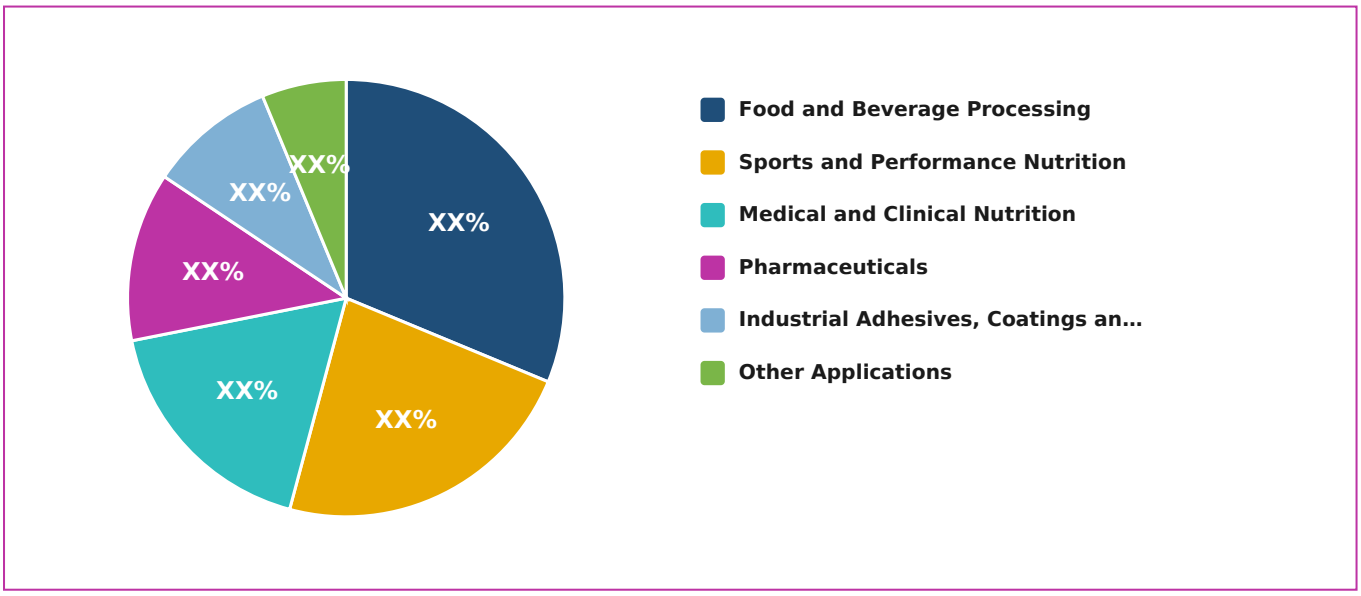
By Application

Processed cheese, bakery, confectionery, dairy beverages and emulsified foods keep food and beverage processing in the lead. Sports nutrition is the fastest-growing application as formulators use casein for

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sustained amino-acid release and blended protein systems. Medical nutrition generates premium demand for high-purity, heat-stable and low-spore grades, while industrial uses provide a stable outlet for adhesive, coating and binder functionality.

Value share by application, 2025



Source: XXX

Value by application, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Food and Beverage Processing	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Sports and Performance Nutrition	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Medical and Clinical Nutrition	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Pharmaceuticals	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Industrial Adhesives, Coatings and Plastics	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Other Applications	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Grade

Food-grade casein dominates because it spans processed dairy, bakery, confectionery and mainstream nutrition. Pharmaceutical and medical grades achieve the fastest growth and highest qualification burden through tighter microbiological, traceability and compositional specifications. Industrial grade remains price-sensitive but benefits from casein's renewable binder and film-forming characteristics.

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Value by grade, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Food Grade	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Pharmaceutical and Medical Grade	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Industrial Grade	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Form

Powder dominates because spray-dried and milled casein can be shipped economically, stored for extended periods and incorporated into dry blends. Wet curd and liquid formats are concentrated in integrated or short-haul supply chains where processors can avoid drying costs. Improved instantization and agglomeration are strengthening powder performance in beverage and nutrition applications.

Value by form, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Powder	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Wet Curd and Liquid	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

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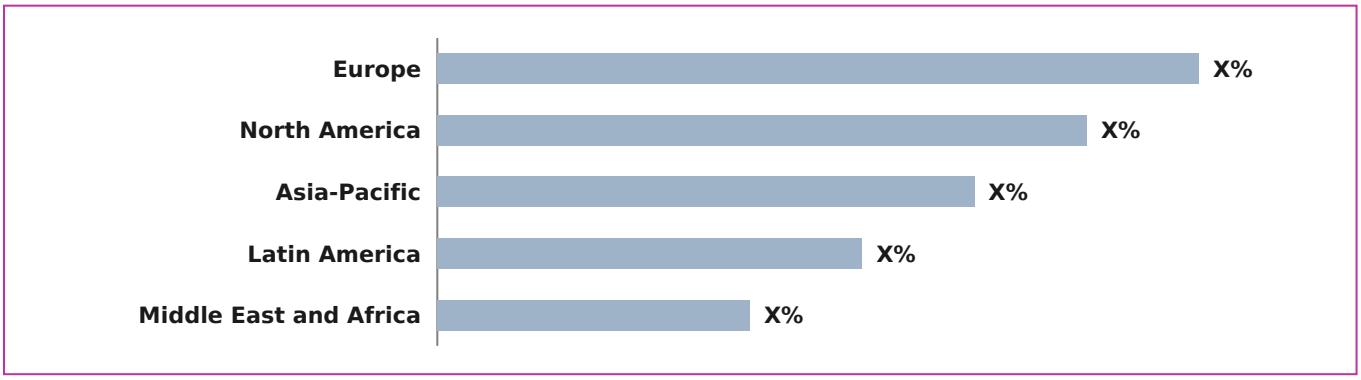
Casein Market Regional Analysis and Country Outlook

Europe generated XX% of global casein revenue in 2025, reflecting a dense network of milk processors, ingredient specialists and processed-food customers. France, Germany, Ireland, the Netherlands and Denmark combine strong raw-material access with advanced drying, filtration and application capabilities. Regional growth is increasingly value-led as medical nutrition, senior nutrition and premium micellar casein offset mature demand in traditional processed foods.

North America represented XX% of 2025 value and remains a major import-dependent consumption center. The United States anchors demand through sports nutrition, protein bars, clinical products, coffee whiteners and industrial binders; USITC data show that caseinate imports grew XX% between 2019 and 2024 even as basic casein imports declined. This divergence reinforces the shift toward soluble and formulation-ready derivatives.

Asia-Pacific accounted for XX% of 2025 revenue and will lead growth at an XX% CAGR. China is scaling adult and clinical nutrition, India is expanding processed dairy and performance nutrition, and Southeast Asian manufacturers are increasing use of imported casein in recombined dairy, bakery and beverage products. New Zealand remains the region's pivotal export supply base, shipping XXX.2 metric tons of HS 350110 casein in 2024.

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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Casein Market Competitive Landscape and Company Share

The global casein market is moderately concentrated: the ten largest suppliers captured XX% of 2025 revenue, while regional dairies and specialist formulators supplied the balance. Fonterra, Royal FrieslandCampina, Arla Foods Ingredients and Lactalis Ingredients combine milk-pool access, multinational sales coverage and technical application support; specialist companies compete through customized caseinates, industrial grades and flexible batch sizes.

Investment is moving toward higher-value protein streams rather than undifferentiated commodity capacity. Fonterra's approximately NZD XXX Studholme investment targets advanced proteins, Arla Foods Ingredients has expanded its specialized-protein platform, and Lactalis Ingredients is commercializing native micellar casein in high-protein beverages. These moves raise the importance of membrane filtration, low-spore processing and customer co-development.

Portfolio repositioning is also reshaping competitive control. Kerry completed the first phase of the Kerry Dairy Ireland disposal to Kerry Co-op at the end of 2024, placing dairy ingredient assets closer to farmer ownership, while Fonterra has focused its strategy on Ingredients and Foodservice. Scale will remain important, but share gains will depend more heavily on performance validation, regional inventory, sustainability data and formulation services.

Leading companies

Company	HQ	Est. revenue 2025	Market share 2025	YoY
Fonterra Co-operative Group	XXX	XXX	XXX	XXX
Royal FrieslandCampina	XXX	XXX	XXX	XXX
Arla Foods Ingredients	XXX	XXX	XXX	XXX
Lactalis Ingredients	XXX	XXX	XXX	XXX
Savencia Fromage & Dairy	XXX	XXX	XXX	XXX
Tatua Co-operative Dairy Company	XXX	XXX	XXX	XXX
Westland Milk Products	XXX	XXX	XXX	XXX
Kerry Dairy Ireland	XXX	XXX	XXX	XXX
Dairygold Co-operative Society	XXX	XXX	XXX	XXX
DMK Deutsches Milchkontor	XXX	XXX	XXX	XXX
Lactoprot Deutschland	XXX	XXX	XXX	XXX
AMCO Proteins	XXX	XXX	XXX	XXX

Source: XXX

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Casein Market Forecast and Commercial Opportunities

The market will add USD XXX billion in annual revenue between 2025 and 2031. Nutrition applications will account for a disproportionate share of the increase as micellar casein, calcium caseinate and low-lactose grades move into medical beverages, high-protein snacks and healthy-ageing products. Basic industrial and processed-cheese demand will remain essential to plant utilization and milk-solids balancing.

Under the central forecast, value grows at XX% annually while volume expands at XX%, reflecting a sustained mix shift toward higher-purity and application-specific products. A stronger nutrition-investment cycle and stable milk costs would lift the 2031 market above USD XXX billion; prolonged dairy inflation and faster whey substitution would hold the market closer to USD XXX billion.

The strongest commercial positions will combine secure milk sourcing, flexible fractionation and documented performance under UHT, high-protein and low-pH processing conditions. Suppliers that pair these capabilities with emissions traceability and local technical support in Asia-Pacific will capture the largest share of incremental value.

Opportunities

- Heat-stable micellar casein for ready-to-drink nutrition
- Low-lactose and low-spore casein for clinical applications
- Customized sodium and calcium caseinate systems
- Protein-enriched foods for healthy ageing
- Local application laboratories in China, India and Southeast Asia
- Lower-carbon casein supported by farm-level emissions measurement

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