

优质美国乳品原料的创新应用

Innovative Applications of Quality U.S. Dairy Ingredients

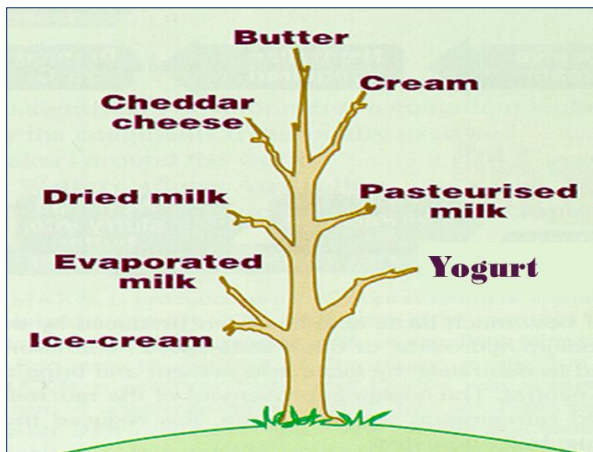
2023中国国际乳制品行业大会暨乳制品行业国际贸易论坛
China International Dairy Industry Conference 2023

2023年8月6日
August 6, 2023

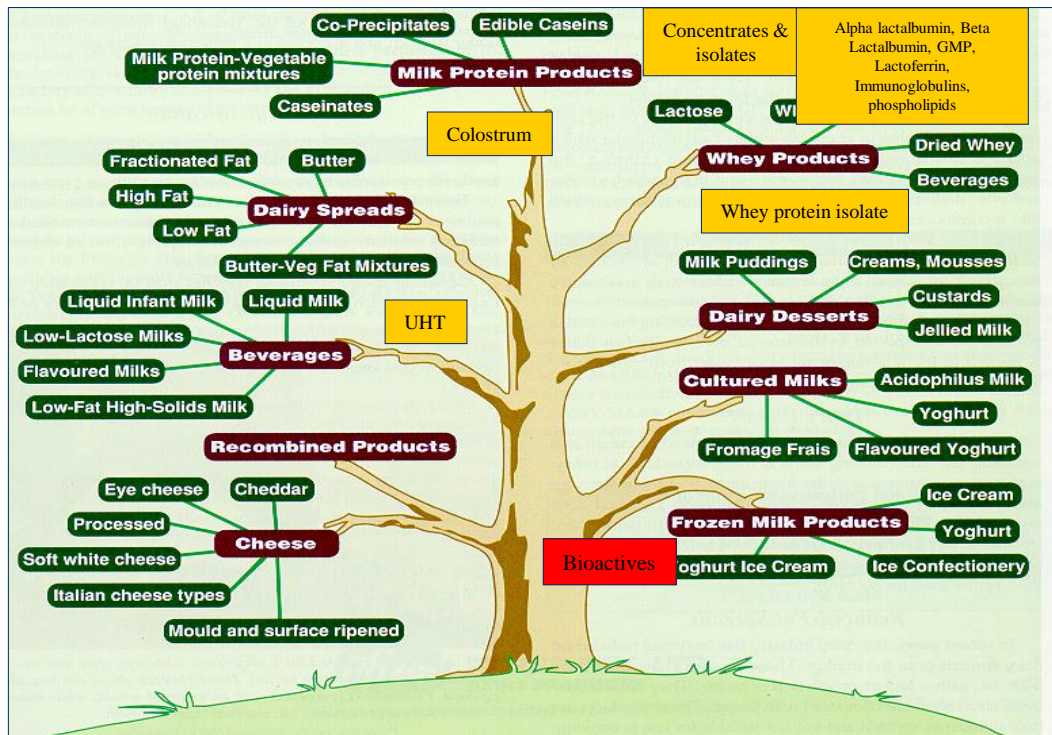


Think USA Dairy
brought to you by U.S. Dairy Export Council

乳品家族 Dairy Landscape



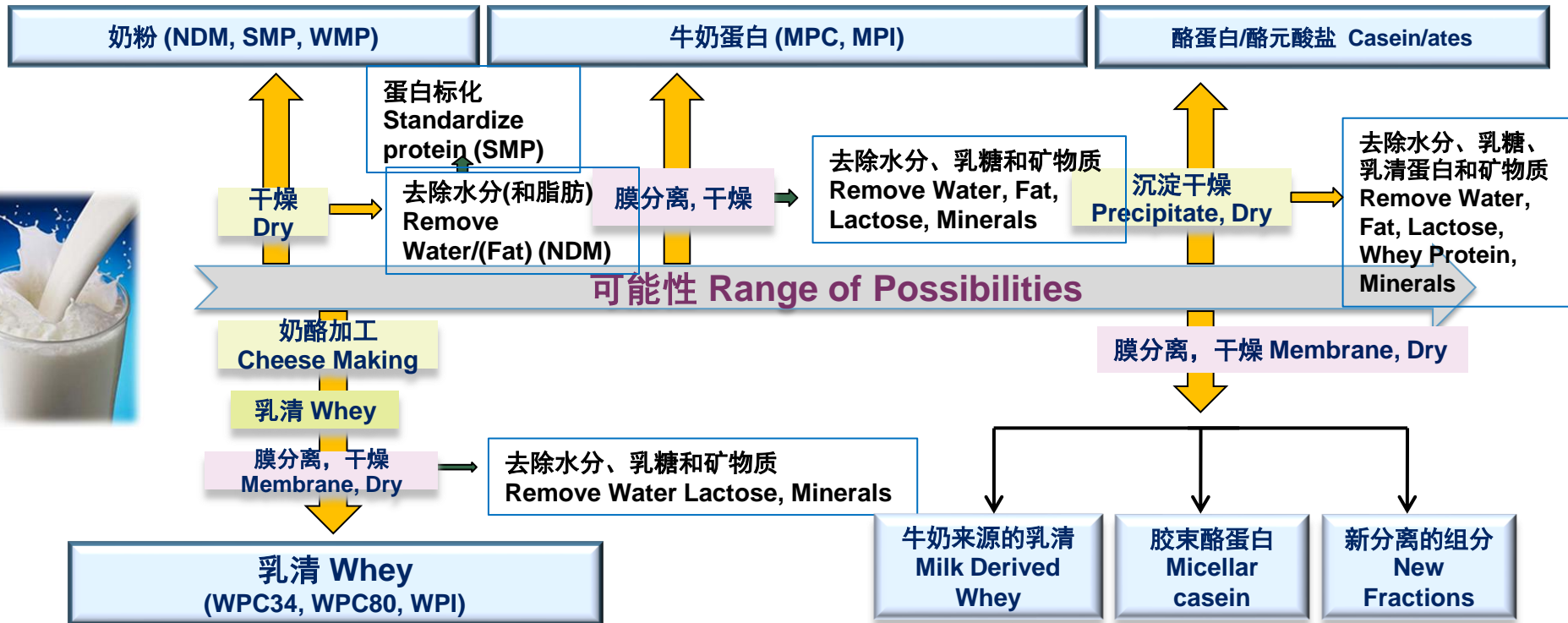
1970年代



现在

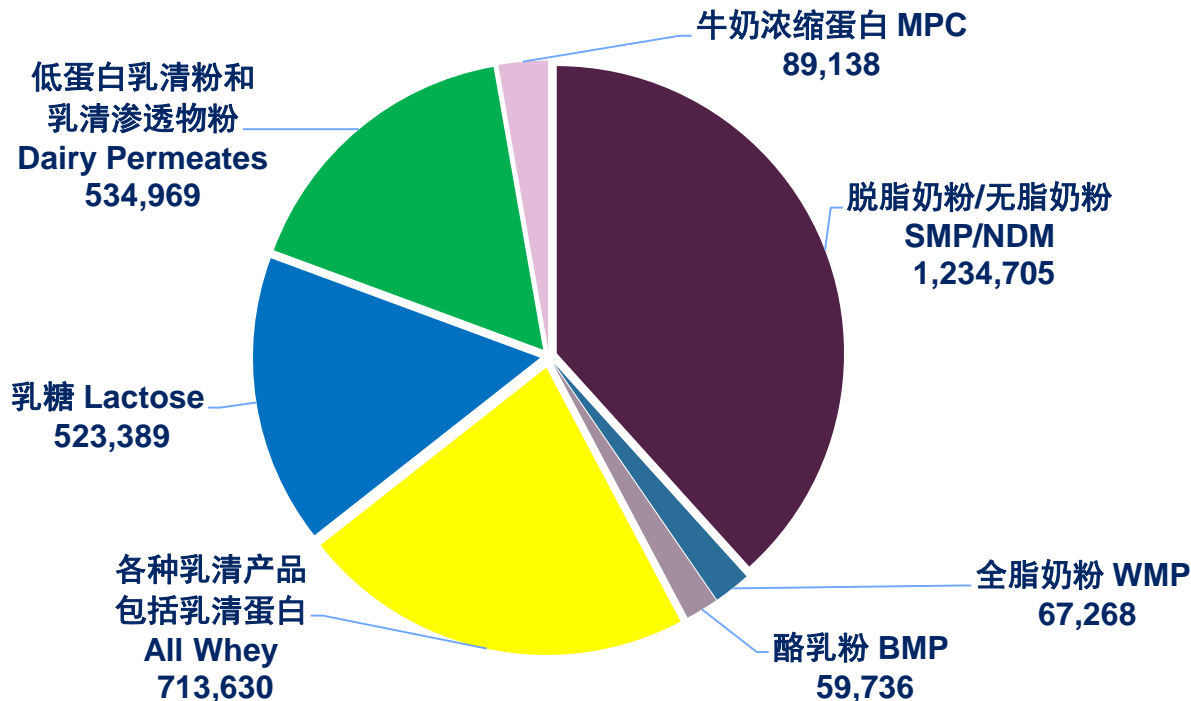
乳品配料类别和品类随牛奶分离加工技术进步而不断演变

Dairy Ingredients Landscape is Evolving With Milk Fractioning Technology



2021年美国各类乳品配料产量概览

U.S. Dairy Ingredient Production Snapshot: 2021



Source: U.S. Dairy Export Council, U.S. Department of Agriculture

*Whey Ingredients here excludes permeate. #Whey Permeate data is estimated and from industry sources. Milk permeate data not included, data N/A.

英诺华 | 英诺华数据库 Innova Market Insights | Innova Database:

2022年全球食品和饮料的上市新品汇总分析

Tracked Global New Product Introduction 2022 Snapshot

乳蛋白和乳制品渗透物粉 Whey Protein / Milk Protein / Dairy Permeates



乳蛋白 Dairy Proteins

关于乳清蛋白的主要发现 Key findings for whey proteins

- **全球应用乳清蛋白的新品上市情况活跃**
- Global launch activity for whey protein products remained robust
 - 在运动营养和婴幼儿营养的应用有所下降
 - Decreased launches for sports nutrition (-7.1%) as well as baby and toddler (-17.4%) products
 - 零食、麦片、软饮和即时餐以及配菜都有显著增长
 - Strong gains in other emerging growth categories such as snacks (+36.5%), cereals (+17.4%), soft drinks (+22.2%) and ready meals and side dishes (+13.0%)
- **乳清蛋白的功能和营养特性是主要的驱动力**
- Whey protein product performance/functionality and nutritional aspects were two major drivers of new product introductions, particularly as consumers have become more aware of the benefits of consuming protein boosted products for health and wellness
- **2022年，超过58%的上市新品具有高蛋白宣称**
- Over 58% of new product launches with whey proteins in 2022 featured a high/source of protein claim

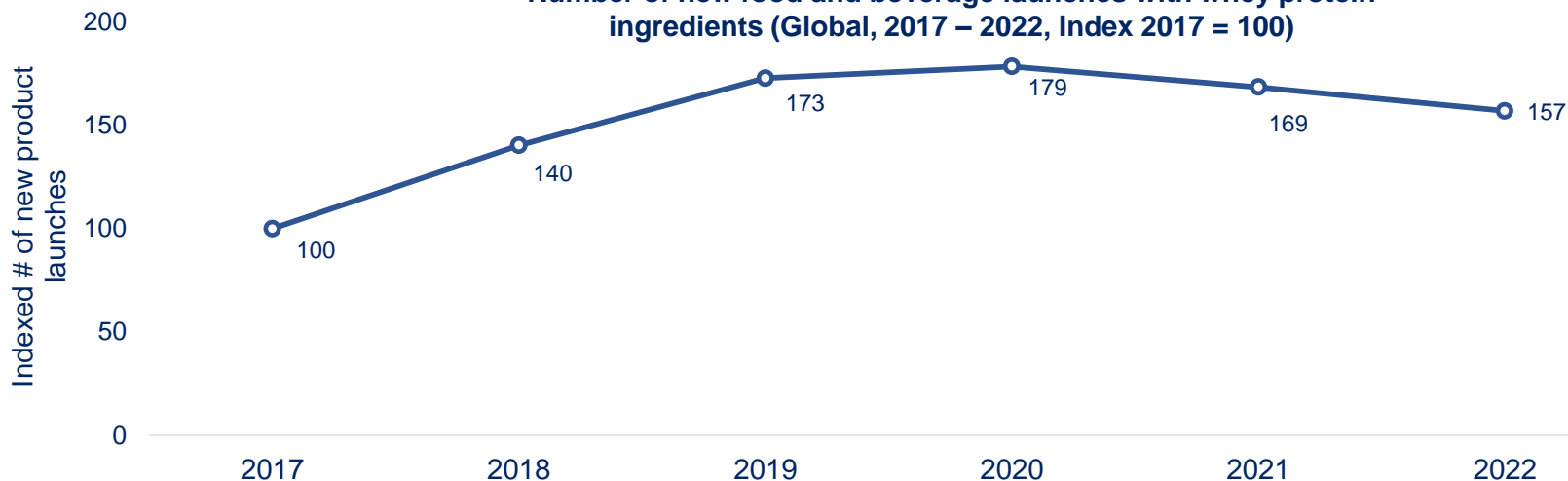
全球应用乳清蛋白的上市新品在增长

Global growth for new product development with whey protein

2017-2022年期间，全球应用乳清蛋白的食品和饮料的上市新品的复合年均增长率为9.4%

Between 2017-2022, tracked new food and beverage introductions with whey protein ingredients globally showed a compound annual growth rate (CAGR) of 9.4%

Number of new food and beverage launches with whey protein ingredients (Global, 2017 – 2022, Index 2017 = 100)



Source: Innova Database

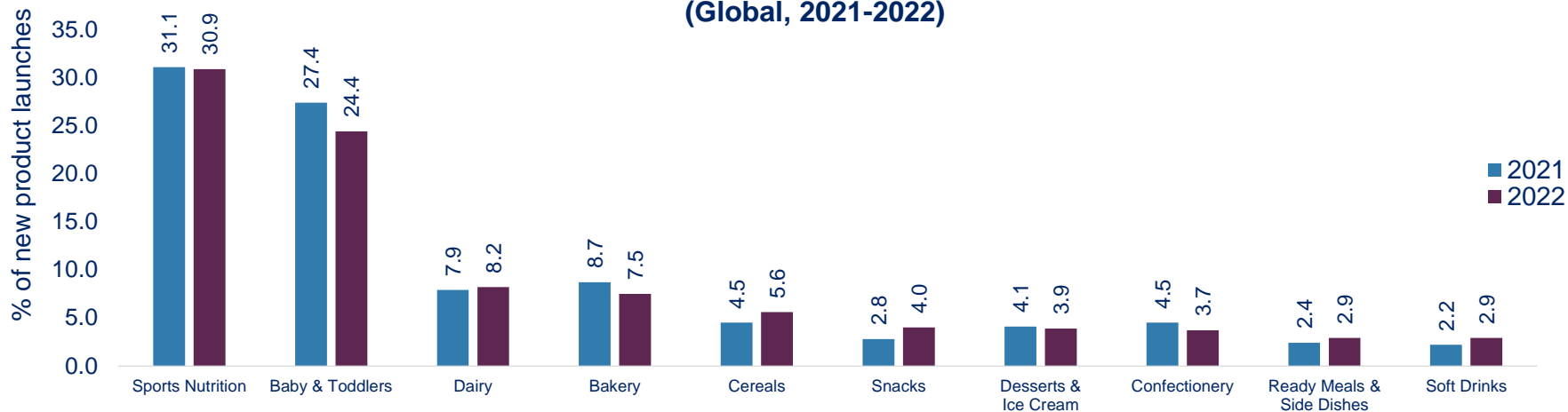
Note: Whey protein ingredients include whey protein - other, whey protein concentrate, whey protein hydrolysate and whey protein isolate

乳清蛋白的主要应用类别保持稳定

Categories for whey protein inclusion remain relatively stable

- **运动营养排首位** **Sports nutrition** remains the **top category** for application of whey protein ingredients globally
- **零食和麦片有增长** **Snacks (+1.2%) and cereals (+1.1%)** categories showed the most growth in share between 2021 and 2022
- **软饮的复合年均增长率最快** **Soft drinks** is the **fastest growing category** with a CAGR of +13.2% (2018-2022)

Top market categories as a percentage (%) of new food and beverage launches with whey protein ingredients (Global, 2021-2022)



Source:

Innova Database

Note:

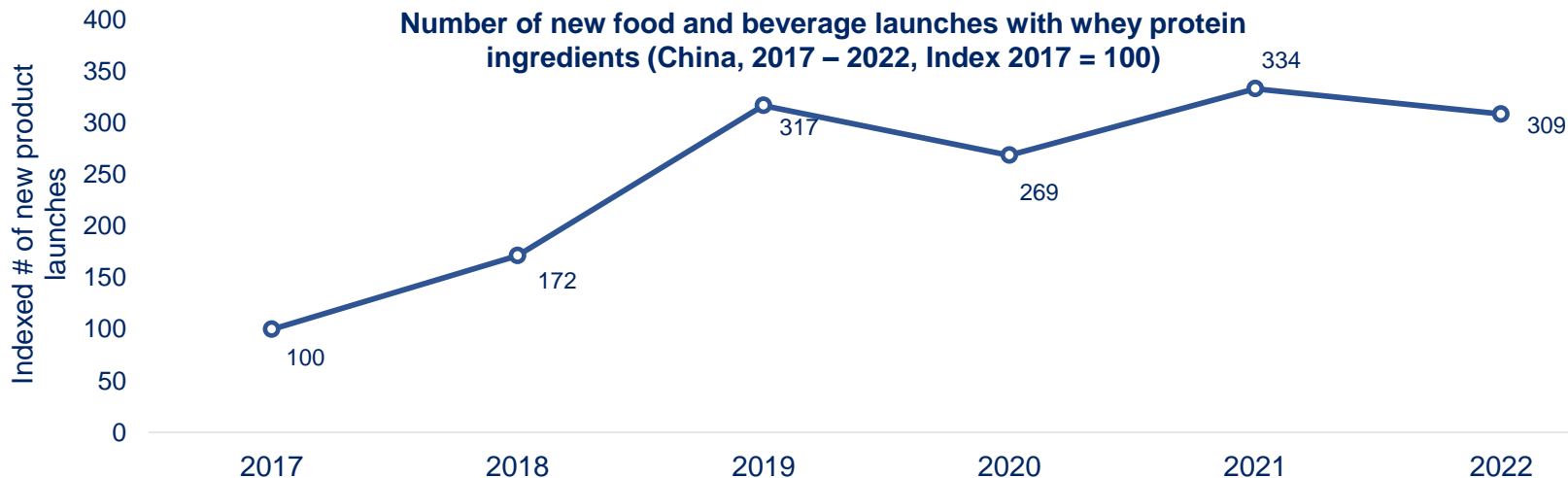
Whey protein ingredients include whey protein - other, whey protein concentrate, whey protein hydrolysate and whey protein isolate

在中国应用乳清蛋白的上市新品

Chinese growth for new product development with whey protein

2017-2022年期间，应用乳清蛋白的食品和饮料的上市新品的复合年均增长率为25.3%

Between 2017-2022, tracked new food and beverage introductions with whey protein ingredients in China showed a compound annual growth rate (CAGR) of **25.3%**



Source: Innova Database

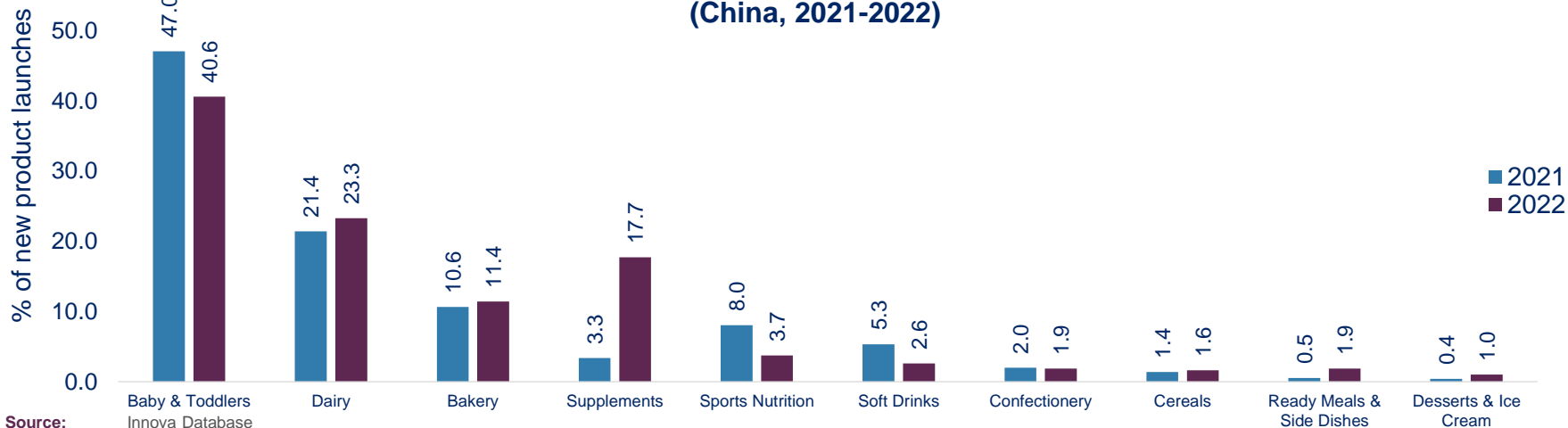
Note: Whey protein ingredients include whey protein - other, whey protein concentrate, whey protein hydrolysate and whey protein isolate

中国：乳清蛋白的首要应用领域为婴幼儿营养和乳品，营养保健应用增长迅猛

China – Top categories for whey protein inclusion are primarily in Baby & Toddlers and Dairy, with Supplements seeing a spike

- 2021-2022年：营养保健领域的年增长率为14.4%
- 2018-2022年：营养保健的复合年均增长率为50.3%

Top market categories as a percentage (%) of new food and beverage launches with whey protein ingredients (China, 2021-2022)



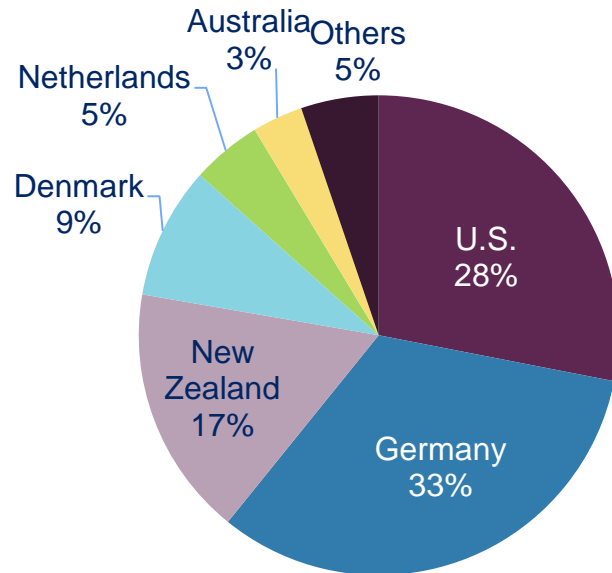
Source: Innova Database
Note: Whey protein ingredients include whey protein - other, whey protein concentrate, whey protein hydrolysate and whey protein isolate

美国：中国重要的供应国 USA: Important Supplier to China

中国从美国进口的WPC80/WPI (2015-2022)



中国从世界进口的WPC80/WPI (2022)
Total: 35,777 MT



乳制品渗透物粉

Dairy Permeates

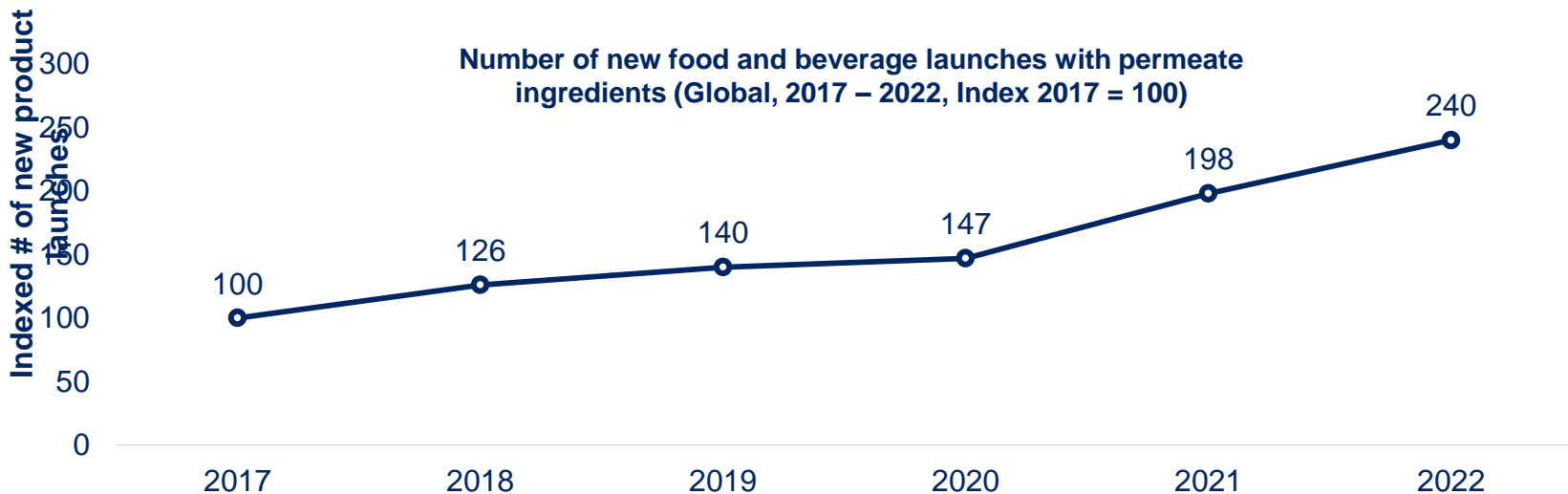
主要发现 Key Findings

- **应用乳制品渗透物粉上市新品数量在2022年创新高**
- **2022** was a **record year** for new permeate launches globally continuing the growth momentum from previous years
 - The highest number of new product launches in 2022 were in the U.K. and U.S.
- **在烘焙中的应用显著增长**
- **Bakery** saw steep year-over-year **growth** in permeate applications with **cookies** nearly **doubling** new global launches from 2021
 - **糖果和烘焙为排名前两位的应用领域**
 - **Confectionery** and **bakery** are the **top categories** in 2022 and make up half of all new global launches of products with permeate applications

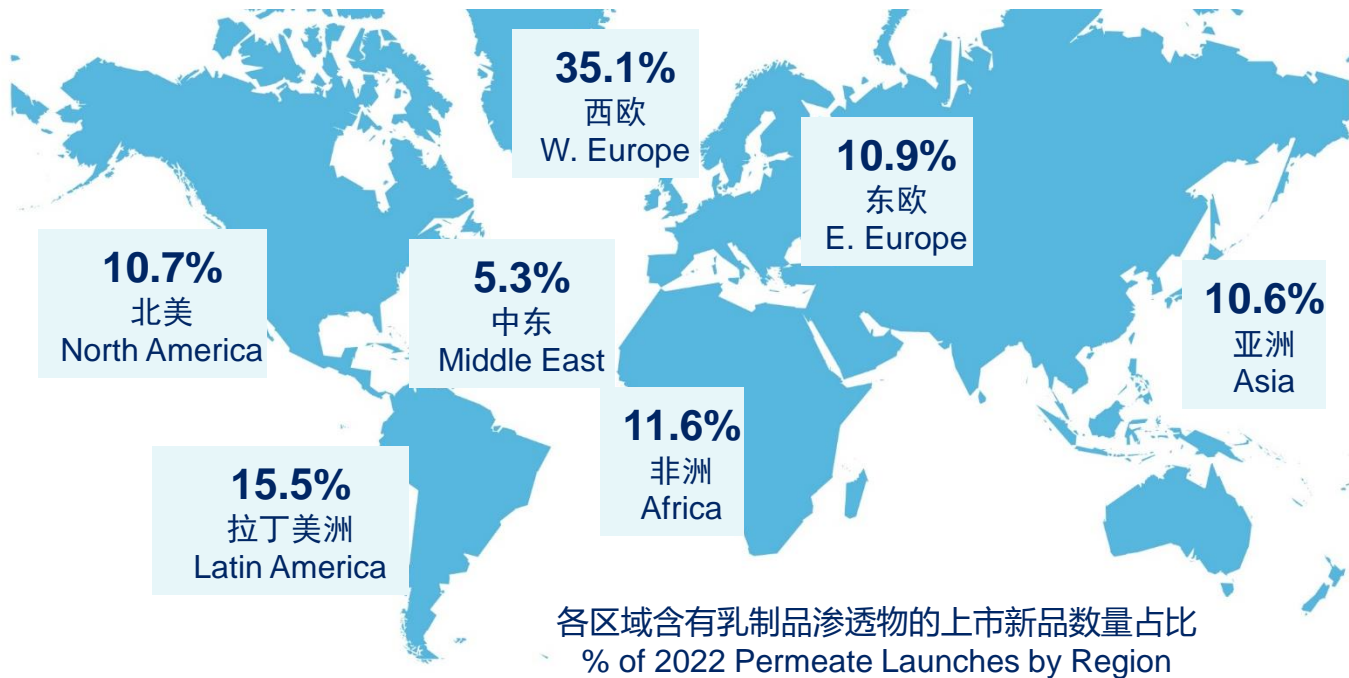
上市新品数量不断增加

Rapid and Continuous Increase in New Product Launches

- 2017-2022年，含有乳制品渗透物粉的全球上市新品数量复合年均增长率为19.2%；2020-2022年加速增长（27.7%）
- Between 2017-2022, tracked new food and beverage introductions with permeates globally achieved a sharp CAGR of +19.2% with the growth pace accelerating, recording a CAGR of +27.7% from 2020-2022 globally



乳制品渗透物粉的应用遍布全球 Permeate Usage Spans The Globe



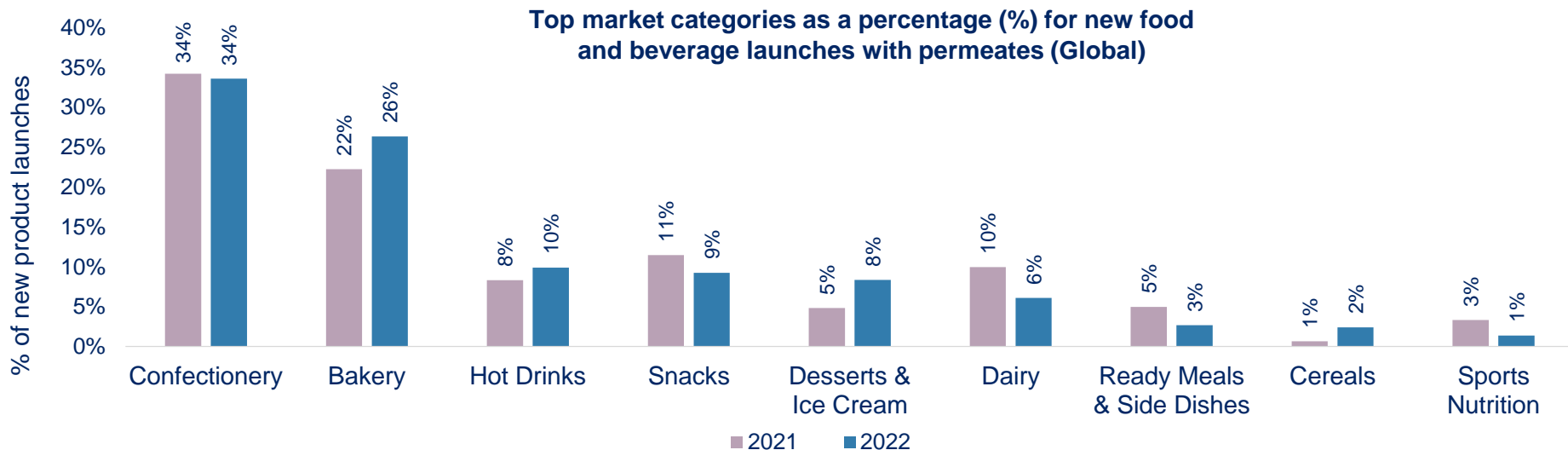
54%

含有乳制品渗透物粉的新品
在西欧和北美以外的地区上
市 (2022年)

of 2022 launch activity
outside the early adopters
of W. Europe and N.
America

主要的产品应用类别

- 糖果在过去5年的复合年均增长率为34% Confectionery: +34% CAGR over the past five years
- 甜品和冰淇淋也有增长（32%） Desserts and ice cream (+32%) is another growing top category for application of permeates in food and beverages over the past five years (CAGR)



乳品创新中心助您选择 优质美国乳蛋白和乳制品渗透物粉

Dairy Innovation Center Facilitates Choosing
Quality U.S. Dairy Proteins and
U.S. Dairy Permeates

美国乳品出口协会 U.S. Dairy Export Council

- **独立的会员制组织**
- **110多家会员**
 - 美国乳品生产商
 - 乳品加工商和合作社
 - 贸易公司
 - 联盟公司和组织
- **主要由美国奶农出资，创建于1995年**
- **总部位于美国弗吉尼亚州阿灵顿**
- **在美国以外的很多国家有市场代表，包括中国**
- **致力于加速您的业务成功**



丰富且完全免费的资源

<http://www.thinkusadairy.org>

- 手册 Brochures
- 视频 Video
- 线上研讨会回放 Past Webinars
- 配方 Recipes
- 供应商 Suppliers



乳制品渗透物粉 - 食品和饮料的创新利器
助力实现减盐, 提供乳矿物质及更多
Dairy Permeate Creates Innovative Opportunities for the Food and Beverage Industry
Enables Sodium Reduction, Provides Dairy Minerals and Beyond

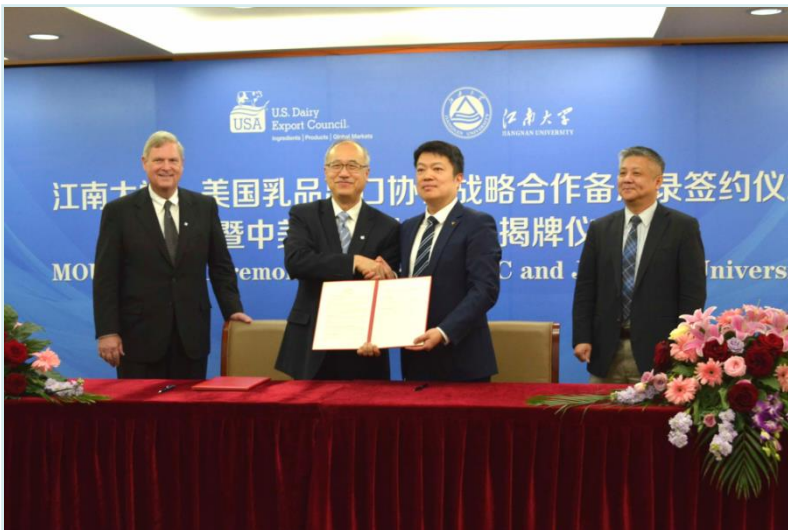


美国乳蛋白
健康食品中的全能明星
U.S. Dairy Proteins
Versatile Star for
Healthy Food

日期: 2021年12月2日上午9:30 - 12:00
Date: December 2, 2021, 9:30am - 12:00pm

美国乳业致力于在中国市场的长期深入发展

U.S. Dairy Committed to China Market



江南大学副校长徐岩先生和美国乳品出口协会总裁和首席执行官汤姆维尔萨克先生
2018年3月30日 中国无锡
Dairy Center Set Up in Jiangnan University, Wuxi, China

应用美国乳蛋白的创新产品原型

- 面条 Noodles
- 面包 Bread
- 蛋白凝胶 Gel
- 冰淇淋 Ice Cream
- 果泥 Puree
- 饼干 Biscuit
- 蛋白脆片 Crisps
- 酸奶 Yogurt



应用美国乳制品渗透物粉的创新产品原型

- 奶茶 Milk Tea
- 速食汤 Soups
- 米饼 Rice Cracker
- 补水饮料 Rehydration Beverage
- 鱼香酱 Fish Flavor Sauce
- 康普茶 Kombucha



美国乳品创新应用研讨会 Technical Seminars



The 2nd International Symposium of Innovation on Dairy Ingredients and Products
第二届乳配料与产品创新研讨会 2019.5.23 江苏无锡



乳品大讲堂 Student Training



学生创新大赛 Student Innovation Competition



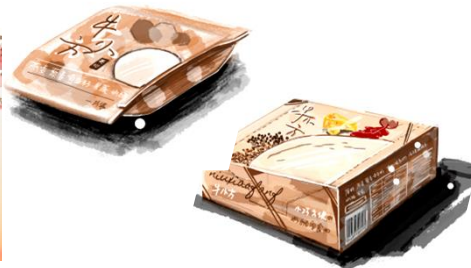
蛋白脆片 Protein Crisps



甜品 Dessert



饼干和焙烤产品 Bakery Products



香肠 Sausage

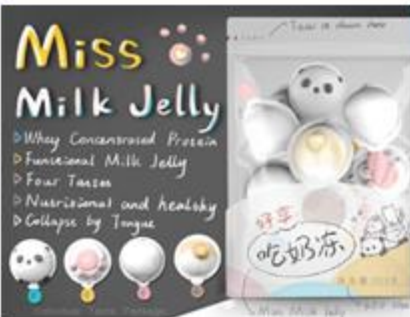


Dessert

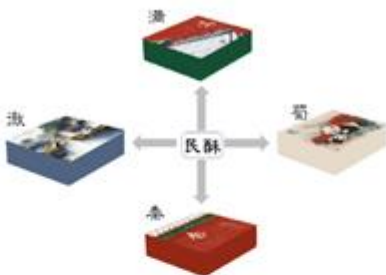
Yogurt



Snacks: Jelly



Bakery



Snacks



Others



Beverage



Porridge & Budding



Ice cream & Yough



Snack



谢谢

Thank You

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changsu@prcon.com

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谢谢

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