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Africa Plant Protein Ingredients - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2017 - 2029

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Report description:

The Africa Plant Protein Ingredients Market size is estimated at USD 1.35 billion in 2024, and is expected to reach USD 1.69 billion by 2029, growing at a CAGR of 4.59% during the forecast period (2024-2029).

F&B sector dominates due to strong demand for plant proteins from bakery products across the region

- The F&B segment drove the African plant protein ingredients market. It is projected to register the second-fastest CAGR of 6.05% during the forecast period. In 2020, its application share by value increased to 62% from 60.7% in 2019. This growth was mostly due to increased stockpiling and consumer panic-buying behavior during the COVID-19 pandemic and subsequent lockdowns. The applications of plant proteins in bakery, one of the primary F&B sub-segments, registered a Y-o-Y growth rate of 16.72% in 2020.
- The personal care and cosmetics segment is projected to register the fastest CAGR of 7.12% during the forecast period, owing to expansive marketing campaigns and increasing distribution channels, especially in e-commerce for personal care products. Growth in men's grooming is another vital factor boosting the market. Major international players in the beauty and cosmetics industry are maximizing the boom anticipated for the Sub-Saharan African market, which is viewed as the industry's "next frontier." Because of their capacity to bind water with the horny layer of skin and its annexes, plant proteins are considered beneficial components for fostering an environment favorable for healthy skin and hair.
- The animal feed segment accounts for the second-largest market share, with a share of 40.39% by volume in 2022. The applications of protein in the animal feed segment are driven by plant protein, mainly soy and wheat proteins, due to their low cost-in-use, excellent digestibility, and neutral flavor profile. The production animal can function at its highest zootechnical level owing to the utilization of novel plant protein sources, such as hydrolyzed plant proteins.

Growing demand for plant-based products the application of plant protein ingredients has been increased among the rest of Africans countries

- The African plant protein ingredients market is led by Nigeria, which is also projected to record the fastest CAGR of 5.97% by value during the forecast period. Despite the country's small vegetarian population, the industry is projected to expand due to the growing acceptance of veganism or vegetarianism. Four out of five Gen Z and millennials in Nigeria are highly likely to try plant-based proteins. Africa has historically been susceptible to food security disruptions and malnutrition, with plant-based protein solutions a potential source of increased food security.
- South Africa is another leading market, largely led by soy protein applications in animal feed. The comparatively bigger animal feed sector of the country, accounting for a 33.04% share of the overall African animal feed industry, has further catered to the growth of the South African market. Soy protein is commonly used in the animal feed sector due to its low cost and high protein content. In 2022, soy protein isolates cost 36.74% less than pea protein isolates in South Africa. The use of soy protein isolates in combination with high-quality carbohydrate feed such as whey powder to feed early-weaned piglets of different ages has achieved similar growth performance to skimmed milk powder.
- There is widespread consumer acceptability and significant demand for plant-based meat throughout Africa, especially in Kenya, Nigeria, and South Africa, as 1.82 million, 17 million, and 1.5 million people in Kenya, Nigeria, and South Africa suffer from severe malnutrition, respectively. Due to the significant prevalence of malnutrition, the plant-based protein market is likely to grow across the region in the future.

Africa Plant Protein Ingredients Market Trends

Plant protein consumption to grow with steady growth rate

- Manufacturers constantly embrace open innovation to gain cost leadership and fixed suppliers in the early development stage. Plant ingredients in sports nutrition products constitute the major share of the market by application, followed by animal feed. Changing consumer lifestyles and rising healthcare costs are playing a vital role in the growth of the plant protein market. Health expenditure in Sub-Saharan Africa rose by 29.98% in 2019. The market is expanding at an accelerated rate due to the retail industry's thriving growth. Increased consumer demand for clear labeling drives the need for plant proteins, which also offer ease of digestion, no allergens, and sustainability.
- The rising demand for plant-based proteins in the country has urged key market players to provide ingredients to cater to the rising demand. In countries like Kenya, nearly 80% of millennial consumers are likely to try a plant-based protein. In Nigeria, 76% of consumers lean toward plant-based food. The high level of acceptance of plant-based products provides an opportunity to minimize dependence on traditional meat, enhancing outcomes for public health, the environment, and animal welfare.
- There has been a growing consumer inclination toward veganism as obesity in the region reaches epidemic proportions. To combat this preventable condition, health awareness among consumers is becoming more widespread, and people are increasingly turning to plants. The region's demand for vegan and vegetarian food has increased due to consumers' growing awareness about the health benefits of consuming plant-based foods, leading to the establishment of food service outlets featuring vegan options. In 2020, South Africa saw a 71% spike in vegan takeaway orders, making it the continent's top seller.

Soy, wheat, and pea production contributes majorly as raw material for plant protein ingredients manufacturers

- The African region has soybeans, rice, and wheat-sourced protein as major plant proteins. African producers supply less than 1% of the world's soybeans. South Africa, Nigeria, and Zambia are the top three soybean producers on the African continent. The soybean production in South Africa increased from 742,000 tons in 2016 to 1,245,500 tons in 2020. Commercial soybean production on large farms takes place in Zambia, Zimbabwe, and South Africa. However, it is mostly cultivated by small-scale farmers in other parts of Africa, where it is planted as a minor food crop among sorghum, maize, or cassava.
- Nigeria's six-year production (2016-2021) of soybean average was 454,600 tons, which is 25% of the continent's production. Zambia's three-year average was 10.4 million bushels, which is around 10% of the continent's production. The other 21 countries, where data are available, produced 25% of Africa's total soybean production. The average national production is 4,026,969 bushels, and the smallest producer is Madagascar, whose three-year production average is 1,470 bushels.
- Traditionally, wheat was not the leading staple crop in Africa. It is becoming an important food crop because of rapid population growth associated with changes in food preference for easy and fast food, such as bread. Africa produced around 30.4 million metric tons of wheat in the trading year 2021, compared to 26.6 million metric tons in 2017. In 2013, total wheat consumption in SSA reached 25 million tons, with imports accounting for 17.5 million tons at USD 6 billion. During the same period, the region produced only 7.3 million tons on a total area of 2.9 million hectares. The region's low productivity (2t/ha) is principal because of abiotic and biotic stresses.

Africa Plant Protein Ingredients Industry Overview

The Africa Plant Protein Ingredients Market is fragmented, with the top five companies occupying 5.56%. The major players in this market are Amesi Group, Cargill Incorporated, International Flavors & Fragrances Inc., Kerry Group PLC and Wilmar International Ltd (sorted alphabetically).

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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