

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

Market Report | 2024-02-17 | 219 pages | Mordor Intelligence

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Report description:

The Germany Plant Protein Market size is estimated at USD 461.36 million in 2024, and is expected to reach USD 574.93 million by 2029, growing at a CAGR of 4.5% during the forecast period (2024-2029).

Increasing lactose-intolerant population in Germany with growing demand for natural products is driving the segmental growth

- By end user, the market is led by the food and beverages segment, majorly due to the increasing preference for plant-based foods as a sustainable alternative. It was mainly driven by the meat alternatives segment, with a share of around 25% by value in 2022, due to the growing demand for meat substitutes, owing to the rising trend of veganism. The trend resonates with consumers' growing interest in veganism and the increasing lactose-intolerant population in the country. Germany ranked second in Europe in terms of the number of vegans in 2022. More than 2.5 million vegans reside in the nation, and the country is renowned for its plant-based and meat alternative industries.

- Supplements are anticipated to be the fastest-growing segment in the market, with a CAGR of 7.15% during the forecast period, owing to their several health benefits. Weight management and general health and well-being are the major concerns among German consumers, which act as driving factors for the increasing demand for plant protein in various supplements. Plant proteins, such as rice and peas, are gaining popularity for being hypoallergenic and a nutritious alternative for people suffering from lactose intolerance. About 16% of the German population was lactose intolerant in 2022, leading to high demand for plant-based proteins.

- The usage of plant proteins in the personal care and cosmetic industry is still at a nascent stage due to the prevalence of other effective bioactive ingredients such as antioxidants, mineral oils, and alcohol. The German population's interest in a greener lifestyle is boosting the demand for natural and plant-based beauty products with vegan claims. Germany has the most number of

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vegans in Europe, which doubled from 1.3 million in 2016 to 2.6 million in 2020.

Germany Plant Protein Market Trends

Plant protein consumption growth fuels opportunities for key players in the ingredients sector

- The German plant protein market is driven by consumers' increasing conversion toward vegan diets due to their functional efficiency, the cost competitiveness offered by reliable plant protein products such as soy, wheat, and pea, and their increasing application in various processed foods. Soy protein is considered healthy for all age groups and helps maintain proper body functions. Plant-based protein alternatives are widely used in the food and beverage and supplement segments. They can be derived from sources such as soy, wheat, and other vegetables, which are essential parts of the food and beverage segment, thus boosting plant protein consumption in Germany. As more consumers increased their preference for vegan diets, the number of vegans in Germany doubled, reaching 2.6 million people and accounting for 3.2% of the population from 2016 to 2020.
- Favorable government policies to reduce various diseases, such as obesity and diabetes, by controlling meat consumption may result in a growing consumer shift toward wheat protein. Currently, at least 7.2% of the population in Germany has diabetes, most of them type 2 diabetes. The number of people with diabetes is expected to increase significantly over the next two decades.
- The growing demand for clean-label ingredients and stringent labeling regulations by food authorities are compelling food manufacturers to adopt natural ingredients. Thus, ingredient manufacturers operating in the market are focusing on developing innovative ingredients to cater to the growing demand and achieve a competitive advantage in the market. There is a rising demand for vegan food products and an increasing number of lactose-intolerant consumers in Germany. As a result, the overall plant protein consumption increased from 47 g in 2017 to 53 g in 2022.

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

- Germany's cereal production reached 42 million ton in 2021, a decrease of 2% from 2020, mainly due to heatwaves and drought, which affected the country. Wheat production for 2019-2020 reached 24.2 million ton, up from 20.3 million ton the previous year. Farmers in Germany were growing winter wheat for harvest in 2022 on 2.89 million hectares, 0.6% more than the previous year. In 2022, oat production was estimated at 600,000 ton, with wheat exports at 5.2 million ton, with imports at 3.7 million ton.
- The German government's program to encourage soybean cultivation has been successful, with plantings for the 2020 crop expanding by 13.8% to 32,900 ha, but with no harvest forecast available. The soybean production in the country recorded an increase of 110% in 2020 since 2016. Germany also grows potatoes more than any other country in the region, producing 11 million ton a year (almost 20% of the European harvest). Additionally, the country's rice production makes it self-sufficient. In 2018, the domestic rice supply in Germany amounted to 405 thousand ton.
- The oat production in the country has also registered remarkable growth in terms of volume. In 2020, the oat production volume increased by 39% over the previous year. Peas also have significant production in the country, encouraging investments by many private entities. Companies are expanding their production capacity by establishing protein plants. Such strategies being adopted by manufacturers are expected to produce highly processed pea proteins for the food industry using developed technologies and processes. The rising consumer acceptance of plant-based foods is also influencing production and driving the market.

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Germany Plant Protein Industry Overview

The Germany Plant Protein Market is fragmented, with the top five companies occupying 19.98%. The major players in this market are Archer Daniels Midland Company, Brenntag SE, CHS Inc., Ingredion Incorporated and Kerry Group PLC (sorted alphabetically).

Additional Benefits:

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

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