

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

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Report description:

The Germany Soy Protein Market size is estimated at USD 296.46 million in 2024, and is expected to reach USD 354.34 million by 2029, growing at a CAGR of 3.63% during the forecast period (2024-2029).

Growing fitness industry with balance of amino acids in soy proteins influence the segmental revenue

- Animal feed remained the country's leading application sector for soy protein, and it is projected to register a CAGR of 3.84% by value in the forecast period. Manufacturers are constantly looking for novel protein ingredients that are high-quality, cost-effective, and label-friendly, driving the growth of soy protein. Soybean meal is the main source of protein and amino acids used in animal feed formulations in the region. Soy protein powders provide both nutritional and functional benefits in companion animal foods, calf milk replacers, young animal feed (such as feed for piglets), and aquaculture diets. It is especially suited for liquid and dry food applications where low antigenicity and easy digestibility are required.
- The F&B segment holds the second major market share and is projected to register a CAGR of 2.96% by value in the forecast period. Soy proteins have a wide range of applications in meat- and dairy-alternative products. Soy protein was widely used in meat alternatives due to the industry's ongoing innovation. Flexitarians accounted for 31.1% of the German population in 2021, making up a group of approximately 16.71 million people. The increase in vegan and flexitarian consumers in the region boosted the soy protein demand in the meat alternative products industry.
- The supplements segment is anticipated to be the fastest-growing end-user segment in the market, projected to register a CAGR of 7.93% by volume during the forecast period. In 2021, there were more than 9,492 thousand health and fitness clubs in Germany. The fitness industry is rapidly increasing the usage of various protein ingredients in nutritional supplements used for muscle or tissue repair after workouts. Thus, soy protein powders are gaining more demand in the market.

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Germany Soy 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.

German soybean production has increased more than tenfold since last decade

- Soybean production in Germany increased rapidly in the past few years with the increasing number of consumers accepting the crop as part of their diet. Around 94,100 tons of soybeans were harvested in Germany in 2020, which is recorded as the largest quantity ever. Production grew by 12% on average in 2020 despite lower yields and increased to as much as 60% compared to 2018. German soybean production has increased more than tenfold since 2012 due to a steady expansion in the production area. The soybean area for the 2020 harvest amounted to 32,900 hectares, up by 14% Y-o-Y. On the other hand, yields were slightly lower.
- Over past decades, soy cultivation has exploded, from around 17 million metric tons in 1960 to more than 300 million metric tons today. For instance, around 25-30% is domestically produced. Western Germany saw the strongest drop in yields. North Rhine-Westphalia harvested around 25% less than the previous year, whereas yields in Hesse fell by 20%. However, since Hesse and Mecklenburg-Western Pomerania production areas significantly expanded in 2020, soybean output in the regions was larger than in 2019. Yields in south Germany were also slightly down, and those in eastern Germany generally rose considerably. Saxony-Anhalt registered the biggest increase at 130% to 23.2 decitons per hectare.
- The demand for genetically modified crops is increasing in the region, catching up with most of the production in the region. Large quantities of genetically engineered soy, which has to be clearly marked as such in Germany and the European Union, make their way unmarked onto the supermarket shelves via the food trough. German cultivators are planning to cultivate cold-proof

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beans for the crop to tolerate temperatures below 10 degrees Celsius.

Germany Soy Protein Industry Overview

The Germany Soy Protein Market is fragmented, with the top five companies occupying 25.66%. The major players in this market are Archer Daniels Midland Company, Brenntag SE, CHS Inc., International Flavors & Fragrances Inc. 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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