

Europe Plant Protein Ingredients - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

Market Report | 2025-04-28 | 262 pages | Mordor Intelligence

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Report description:

The Europe Plant Protein Ingredients Market size is estimated at 3.92 billion USD in 2025, and is expected to reach 4.94 billion USD by 2030, growing at a CAGR of 4.72% during the forecast period (2025-2030).

Rising awareness of health risks associated with consuming meat and the expanding availability of plant-based protein substitutes are driving the food and beverage industry in Europe

- The food and beverage segment is leading the end-user market for plant protein in Europe. The food and beverage segment is driven by the meat/poultry/seafood and meat alternative products sub-segment, which is expected to record a CAGR of 3.96% in terms of volume during the forecast period. The growth in sales is linked to the rising awareness of health risks associated with consuming meat and the expanding availability of plant-based protein substitutes in most distribution centers across Europe.
- The demand for plant protein is primarily driven by the rising knowledge about its functionalities and growing awareness about diets that are rich in plant protein. In 2022, the meat/poultry/seafood and meat alternative products sub-segment occupied the major volume of the market, followed by the dairy and dairy alternative products sub-segment. The meat and meat substitutes sub-segment is projected to register a CAGR of 3.87% in terms of volume during the forecast period.
- The supplements segment, led by the sports and performance nutrition sub-segment, is projected to record the fastest CAGR of 7.12% in terms of value during the forecast period. The growing popularity of body-building and muscle-shaping and the rising awareness of the health advantages of plant protein have boosted the protein industry. It has also been claimed that the fitness benefits of whey protein can be replicated by supplementing it with higher dosages of plant protein (40 g/day or more). For people who want to shift their protein consumption to plant-based sources, it is now simpler to adorn these dietary patterns as key players are innovating on the basis of the sensory profiles of their products to make plant proteins as acceptable as possible.

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The demand for plant-based proteins, supported by high-income population, has resulted in an increased market of plant protein ingredients in Russia

- Russia is the largest plant protein-consuming country in the region, as its market is majorly F&B-oriented. In 2021, around 10% of Russians were already eating plant-based alternatives, and 54% were willing to include plant-based food in their diet. The demand for plant-based protein was mainly from Russians with high incomes. Russia's annual household income per capita was USD 6,523 in 2021. Environmental and ethical concerns are still the most unpopular topics among Russian consumers. However, the difference in the significantly increased positive perception of the "plant-based" label has largely been attributed to the market's growth.
- The Netherlands and Belgium registered minor volume and value shares in 2022. They managed to gain sales mainly from the food and beverages and animal feed industries. In 2020, the Netherlands had more than 60 companies and research institutions focused on plant-based protein. Plant-based protein has become more popular in grocery stores and appears on menus at fast-food restaurants across the country. In 2023, soy protein dominated consumption in the country with a value share of 82.41%.
- France is anticipated to be one of the fastest-growing countries, registering a CAGR of 5.47% during the forecast period. Many firms, like ADM, Cargill, and Roquette, invested in plant-based proteins in France to achieve higher profit margins, which helped them cushion the impact of commodity prices and trade wars. Most plant protein used in animal feed is imported, including soy from the United States and Brazil. In 2021, France imported soy valued at USD 5.8 billion from the United States. However, the country aims to increase domestic production for feed and human nutrition, thus boosting agri-food sovereignty and sustainability.

Europe Plant Protein Ingredients Market Trends

The growth in plant protein consumption provides opportunities for key players in the market

- The graph given depicts the per capita consumption of plant protein in all the countries of Europe. The consumer shift toward vegan diets majorly drives the market. The functional efficiency and cost competitiveness offered by reliable plant protein products are increasing their utilization in a wide variety of processed foods. Plant protein from soy is considered healthy for all age groups and helps keep the body fit. Plant-based protein alternatives are being widely used in the food and beverage industry.
- The region has untapped potential among consumers willing to switch their diets to plant-based protein sources. For instance, within four years, the number of vegans doubled from 1.3 million in 2016 to 2.6 million in 2020. However, the market faces challenges, such as a lack of innovation and restrictions on public policy. There are still a few aspects holding back Italian consumers from making the shift, such as the possible presence of GMOs, doubts over the origin of raw materials used in the product's composition, and the possible use of herbicides on crops.
- Plant protein enhances food items' nutritional and functional values and provides good taste. The market observed an increase of around 45-50% in the consumption of plant-based food across the region. For instance, Bolthouse Farms expanded its beverage range with the "1915 Organic" brand line, which includes cold-pressed juices and vegan protein shakes. Also, protein manufacturers are trying to initiate strategic programs that will impact the improvement of consumption of plant protein sources such as soy protein in the region. For instance, Donau Soja developed a Protein Strategy for Europe in 2023, impacting the availability of soybeans in the region.

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Europe is focusing on increasing the production of soy, wheat, and pea

- The graph given depicts the production of dry peas, rice, soybeans, and wheat, raw materials considered for the market. Total grain production in countries like Germany reached 45.7 million ton during 2019-2020, up from 37.9 million ton during 2018-2019. Wheat production for 2019-2020 reached 24.2 million ton, up from 20.3 million ton. However, the United Kingdom is the key producer of wheat and dry peas. In 2019, the country's wheat production amounted to 16.2 million tons, rising by 19.70%, i.e., 2.7 million tons by volume, over the previous year, owing to regular rainfall and a temperate climate.
- Italy is a key producer of distinct plant protein commodities, mainly wheat, followed by rice, soybean, and peas. Italy is the EU's biggest producer of soy and the biggest producer of rice. The country mainly produces Japonica rice. In 2019, Japonica production reached nearly 1.1 million ton, while less than 400,000 ton of Indica varieties were produced. This implied a total milled rice volume of approximately 900,000 ton. Carnaroli, Arborio, Roma, S.Andrea, Baldo, Vialone Nano, and Balilla are among the main varieties.
- Wheat exports amounted to 5.2 million ton, with imports at 3.7 million ton. Plant protein commodities grown in France include wheat, peas, rice, and soybeans. France produced 40,604,960 ton of wheat in 2019. Volume fluctuations in wheat production are caused by bad weather and pest infestation. In contrast, in 2020, France's wheat production was hampered by heavy rains in the fall of 2019, which delayed planting, a mild winter that resulted in an aphid infestation, and a dry spring that caused moisture stress.

Europe Plant Protein Ingredients Industry Overview

The Europe Plant Protein Ingredients Market is fragmented, with the top five companies occupying 28.94%. The major players in this market are Archer Daniels Midland Company, Ingredion Incorporated, International Flavors & Fragrances Inc., Kerry Group PLC and Sudzucker AG (sorted alphabetically).

Additional Benefits:

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

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