

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

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Report description:

The Europe Textured Vegetable Protein Market size is estimated at 1.98 billion USD in 2025, and is expected to reach 3.34 billion USD by 2030, growing at a CAGR of 10.95% during the forecast period (2025-2030).

Innovation in TVP products is driving sales

- TVP sales observed the highest Y-o-Y growth rate of 11.32% in 2020 due to an increase in the number of vegans, which doubled from 1.3 million in 2016 to around 2.6 million in 2022. The market observed a high adoption rate for TVP products as they reproduce the texture and flavor of meat products. Companies are innovating products to further expand in the market. The flexitarian population heavily impacts the TVP market as it is the largest dietary group after non-vegetarians.
- Supermarkets/hypermarkets accounted for 65.9% of the sales through the off-trade channel in 2022. Supermarkets offer a variety of products at discounted prices and wholesale, which is convenient for consumers with busy lifestyles. In Europe, plant-based food retail sales have surged in recent years due to the introduction of new products and innovations in the market, enabling more consumers to purchase next-generation plant-based meat and dairy products that are comparable to animal products in terms of taste, price, and convenience. In the region, the retail sector saw a growth of 21% in sales from 2020 to 2022.
- Around 2.44 million people were vegans in 2022, accounting for 6.4% of the total population. The development of e-commerce is being driven by the center-south region of Italy, which is growing six times faster than northern Italy. Major online retailers, including Amazon Fresh and Coop, started selling plant-based tofu burgers made by Beyond Meat and Impossible Foods. In 2022, in Italy, nearly 28% of consumers bought food or groceries online. Thus, in the region, the online channel is expected to be the fastest-growing segment for the sales of TVP products in Italy, registering a CAGR value of 15.61% during the forecast period.

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The United Kingdom is dominating the market with an increasing young population that follows flexitarian diets

- In Europe, the consumption of textured vegetable protein was static during the historical period. However, it is expected to increase rapidly during the forecast period. As of 2021, around 22% of Europe's total population was flexitarian, meaning they consumed meat and fish less frequently than non-vegetarians. Non-vegetarians are slowly shifting toward meat substitutes to fulfill their protein requirements. The vegan population is expected to grow by 29-33% due to the need for sustainable diets and the concerns about climate change over 2023-25. The flexitarian population heavily impacts the TVP market as it is the largest dietary group after non-vegetarians.
- The United Kingdom majorly consumes textured vegetable protein in Europe. There is an increasing availability of meat substitute products, including textured vegetable protein, in outlets ranging from supermarket shelves to country pubs, aiding the market's growth. The sales value of TVP is expected to expand, registering a CAGR of 7.31% by value over the forecast period. The growing Gen Z population, which accounted for around 14-16% of the total population in 2021, is eager to try new trends, such as plant-based foods and veganism. These factors are propelling the growth of the TVP market in the United Kingdom.
- Besides the UK, France is projected to be one of the fastest-growing markets for textured vegetable protein, with a projected CAGR of 10.23% over the forecast period, owing to the growing flexitarian and vegan populations in the country and the shift in consumer choices toward animal protein sources. The share of French people who follow a flexitarian (semi-vegetarian) diet reached almost 30% as of 2021, with nearly 11% of people between 18 and 21 years admitted to following a vegan diet.

Europe Textured Vegetable Protein Market Trends

Rising demand is expected to help control the prices

- Textured vegetable protein (TVP) is the highest-valued meat substitute in Europe. It was priced around 136% higher than tofu in 2022. In the European market, TVP is usually available as diced, chunks, crumbles, or minced in different colors and sizes, aiming to cater to an extensive range of applications. These include replacing minced beef with minced TVP. In most cases, chunks cost about 10% more than minced TVP in 2022. TVP is expected to observe a decline in prices during the forecast period, owing to the product experiencing competitive prices in the region due to the surging demand and higher production.
- The prices of soybeans, wheat, corn, fava beans, and peas play a key role in the price of TVP. In 2021, Europe suffered from low yields, with wheat production down by 1.17% compared to 2017. Another major barrier to achieving price parity for plant-based proteins is the lack of manufacturing facilities, as plant-based companies typically use contract manufacturers.
- The price of TVP sourced from wheat may rise during the forecast period due to the region's rising wheat prices. In Europe, the price of wheat reached up to USD 453 per ton in 2022 due to the export ban from India, the second-largest wheat producer globally. Russia's invasion of agricultural superpower Ukraine and the ongoing war are projected to increase the price of wheat. The broader consumers consist largely of price-sensitive consumers who are less concerned about ethical or environmental factors and stick to price points while considering plant-based eating. Product development and enhancements, including improved taste and lower prices in the plant-based meat category, are expected to create opportunities in the future.

Europe Textured Vegetable Protein Industry Overview

The Europe Textured Vegetable Protein Market is fragmented, with the top five companies occupying 4.20%. The major players in

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this market are Associated British Foods PLC, Do It Organic, Ingredion Inc., Roquette Freres and Univar Solutions Inc. (sorted alphabetically).

Additional Benefits:

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

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