

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

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Report description:

The North America Plant Protein Ingredients Market size is estimated at 5.62 billion USD in 2025, and is expected to reach 6.9 billion USD by 2030, growing at a CAGR of 4.19% during the forecast period (2025-2030).

- In 2022, the food and beverage segment witnessed the highest demand, followed by animal feed. The F&B segment recorded a CAGR of 4.63% during the study period. The rising utilization of plant proteins in animal feed and cosmetics has driven growth in recent years. The increase in demand for plant proteins in dairy and meat alternatives is expected to drive the segment during the forecast period.
- The increasing demand for protein functionalities, awareness about protein-rich diets, and new technological developments primarily drive the demand for plant proteins in the market. Among all food and beverage segments, meat alternatives lead the demand in the protein market, owing to the proteins' ability to mimic muscle meat texture. They can also be used for protein fortification in meat-alternative products. In 2022, meat alternatives claimed a 41% share of the overall plant proteins consumed in the food and beverage segment. However, the supplement segment is expected to register the highest demand for plant proteins, with a volume CAGR of 6.12% during the forecast period. The demand is high due to increased daily nutritional requirements as a result of changing lifestyles, especially in the sport/performance nutrition category.
- The meat/poultry/fish and meat alternatives segment represented 19.62% of the total protein consumed in the region in 2022. Textured vegetable protein, made from wheat protein or soy protein, has emerged as a major ingredient for plant-based meat manufacturers since it can closely resemble the sensory properties of meat products. As awareness regarding the adverse effects of consuming meat products increases in the country, manufacturers are looking for new ways to replace meat in their products,

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and TVP is one of the prime choices.

Growing demand for sustainable protein sources, primarily driven by the United States, impacts the market segment

- The United States remained the largest plant protein-consuming country in the region during the study period. Its share was majorly influenced by the growing demand for plant-based food products amid rising veganism, environmental concerns, and the demand for sustainable protein sources. In 2022, the retail sales of plant-based food products in the United States increased by 27% compared to the previous year. Thus, the surging demand at the retail end is further expected to boost volume sales of plant proteins. Around 61% of consumers in the United States consider plants to be a preferred protein source over animal-based proteins, which is expected to boost market growth.
- On the other hand, Canada and Mexico held a minor volume share in 2022, majorly driven by the F&B and animal feed segments. The Canadian market is growing in line with the increasing research studies conducted in the segments, boosting consumer interest. In line with the growing market demand, investments are also increasing. In 2021, Protein Industries Canada invested USD 9.7 million in plant protein projects for brands like Daiya and Merit Functional Foods.
- In terms of growth, Mexico is expected to be the fastest-growing country in the regional market, with a projected CAGR of 6.67% by value during the forecast period, owing to the growing acceptance of plant proteins among Mexicans, particularly as meat alternatives. The demand from the growing vegan population in the country mainly drives the Mexican plant proteins market. As of 2021, 20% of Mexicans identified themselves as vegetarians or vegans. Mexican food has been traditionally plant-based, and this return to plant-based food has provided chefs and restaurants with an opportunity to showcase their heritage creatively.

North America Plant Protein Ingredients Market Trends

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

- From 2017 to 2022, the region saw a 2.42% increase in per capita plant protein consumption, driven by investments and innovations. This surge was primarily fueled by a growing number of consumers shifting toward vegan or vegetarian diets, largely motivated by concerns for animal welfare. Notably, in 2020, approximately 9.6 million more Americans adopted plant-based diets, constituting nearly 3% of the US population. After the COVID-19 pandemic, plant protein consumption surged, partly due to concerns over viral contamination in animal-sourced proteins and a general increase in protein blends, including both animal and plant sources.
- While most Americans are reducing their meat intake, they are not eliminating it, leaning more toward a flexitarian diet than strict veganism or vegetarianism. Plant proteins find significant usage in sports nutrition and as meat alternatives. Soy and whey proteins, in particular, are prevalent in food and beverage, supplements, and sports nutrition. By 2021, 36% of US consumers were familiar with and had consumed soy protein, with a slightly lower share of 31% having tried whey protein.
- Canada boasts the second-largest flexitarian population, showcasing a significant shift toward flexitarianism and veganism among consumers. This trend presents a ripe opportunity for manufacturers to further innovate in the plant protein market. In 2021, the Canadian government pledged over USD 4.3 million to bolster the country's pulse and special crop farmers, aligning with the rising consumer appetite for sustainable, high-quality plant-based proteins.

Soy, wheat, and rice production contribute majorly as raw materials for plant protein ingredient manufacturers

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- The graph depicts the total production of raw materials such as dry peas, rice, wheat, and soya beans. The United States is the key producer of some plant protein raw materials in North America. The country produces about one-third of the total soybeans in the world, followed closely by Brazil and Argentina. In 2021, the country produced 119.88 million MT of soybeans, accounting for 31% shares of the global soybean production. Soybeans are the third-largest field crop in Canada. Soybeans have become an important cash crop in cities like Quebec and Manitoba, Maritimes, southeast Saskatchewan, and southern Alberta. Presently, Canada is the producer of 200 registered soybean varieties. Among those registered varieties, 80% of soybeans are herbicide-tolerant.

- The United States is also the wheat-producing leader in the region, followed by Canada, with both countries accounting for almost 100% of the regional wheat production. Wheat ranks third among US field crops, behind corn and soybeans, in planted acreage, production, and gross farm receipts. In the marketing year 2023-2024, US farmers produced 1.8 billion bushels of winter, durum, and other spring wheat from a harvested area of 37.3 million acres. Winter wheat production represents nearly 70% of the total US production. Similarly, in 2023, Canadian farmers grew almost 32 million tons of wheat.

- Arkansas Grand Prairie, Mississippi Delta, Gulf Coast, and Sacramento Valley of California are four regions producing almost the entire US rice crop. Each region typically specializes in a specific type of rice, referred to in the United States by the length of grain, i.e., long, medium, and short. In general, long-grain production accounts for approximately 75% of US rice production.

North America Plant Protein Ingredients Industry Overview

The North America Plant Protein Ingredients Market is moderately consolidated, with the top five companies occupying 50.21%. The major players in this market are Archer Daniels Midland Company, Bunge Limited, 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

Table of Contents:

1 EXECUTIVE SUMMARY & KEY FINDINGS

2 INTRODUCTION

2.1 Study Assumptions & Market Definition

2.2 Scope of the Study?

2.3 Research Methodology

3 KEY INDUSTRY TRENDS

3.1 End User Market Volume

3.1.1 Baby Food and Infant Formula

3.1.2 Bakery

3.1.3 Beverages

3.1.4 Breakfast Cereals

3.1.5 Condiments/Sauces

3.1.6 Confectionery

3.1.7 Dairy and Dairy Alternative Products

3.1.8 Elderly Nutrition and Medical Nutrition

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- 3.1.9 Meat/Poultry/Seafood and Meat Alternative Products
- 3.1.10 RTE/RTC Food Products
- 3.1.11 Snacks
- 3.1.12 Sport/Performance Nutrition
- 3.1.13 Animal Feed
- 3.1.14 Personal Care and Cosmetics
- 3.2 Protein Consumption Trends
- 3.2.1 Plant
- 3.3 Production Trends
- 3.3.1 Plant
- 3.4 Regulatory Framework
- 3.4.1 Canada
- 3.4.2 United States
- 3.5 Value Chain & Distribution Channel Analysis

4 MARKET SEGMENTATION (includes market size in Value in USD and Volume, Forecasts up to 2030 and analysis of growth prospects)

- 4.1 Protein Type
 - 4.1.1 Hemp Protein
 - 4.1.2 Pea Protein
 - 4.1.3 Potato Protein
 - 4.1.4 Rice Protein
 - 4.1.5 Soy Protein
 - 4.1.6 Wheat Protein
 - 4.1.7 Other Plant Protein
- 4.2 End User
 - 4.2.1 Animal Feed
 - 4.2.2 Food and Beverages
 - 4.2.2.1 By Sub End User
 - 4.2.2.1.1 Bakery
 - 4.2.2.1.2 Beverages
 - 4.2.2.1.3 Breakfast Cereals
 - 4.2.2.1.4 Condiments/Sauces
 - 4.2.2.1.5 Confectionery
 - 4.2.2.1.6 Dairy and Dairy Alternative Products
 - 4.2.2.1.7 Meat/Poultry/Seafood and Meat Alternative Products
 - 4.2.2.1.8 RTE/RTC Food Products
 - 4.2.2.1.9 Snacks
 - 4.2.3 Personal Care and Cosmetics
 - 4.2.4 Supplements
 - 4.2.4.1 By Sub End User
 - 4.2.4.1.1 Baby Food and Infant Formula
 - 4.2.4.1.2 Elderly Nutrition and Medical Nutrition
 - 4.2.4.1.3 Sport/Performance Nutrition
 - 4.3 Country
 - 4.3.1 Canada
 - 4.3.2 Mexico

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- 4.3.3 United States
- 4.3.4 Rest of North America

5 COMPETITIVE LANDSCAPE

- 5.1 Key Strategic Moves
- 5.2 Market Share Analysis
- 5.3 Company Landscape
- 5.4 Company Profiles (includes Global Level Overview, Market Level Overview, Core Business Segments, Financials, Headcount, Key Information, Market Rank, Market Share, Products and Services, and Analysis of Recent Developments).
 - 5.4.1 Archer Daniels Midland Company
 - 5.4.2 Bunge Limited
 - 5.4.3 Cargill Incorporated
 - 5.4.4 CHS Inc.
 - 5.4.5 Farbest-Tallman Foods Corporation
 - 5.4.6 Glanbia PLC
 - 5.4.7 Ingredion Incorporated
 - 5.4.8 International Flavors & Fragrances, Inc.
 - 5.4.9 Kerry Group PLC
 - 5.4.10 MGP
 - 5.4.11 Roquette Freres
 - 5.4.12 Sudzucker Group
 - 5.4.13 The Scoular Company

6 KEY STRATEGIC QUESTIONS FOR PROTEIN INGREDIENTS INDUSTRY CEOS

7 APPENDIX

- 7.1 Global Overview
 - 7.1.1 Overview
 - 7.1.2 Porter's Five Forces Framework
 - 7.1.3 Global Value Chain Analysis
 - 7.1.4 Market Dynamics (DROs)
- 7.2 Sources & References
- 7.3 List of Tables & Figures
- 7.4 Primary Insights
- 7.5 Data Pack
- 7.6 Glossary of Terms

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