

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

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Report description:

The South America Plant Protein Ingredients Market size is estimated at 1.24 billion USD in 2025, and is expected to reach 1.67 billion USD by 2030, growing at a CAGR of 6.25% during the forecast period (2025-2030).

The F&B segment dominates the market due to the growing demand for plant protein from dairy and meat alternatives

- The F&B segment is dominated by the meat and meat alternatives sub-segment, which is expected to record a CAGR of 4.74% by volume during the forecast period. Protein ingredients provide properties that mimic meat texture, making them suitable for vegans. The growing knowledge of healthy eating habits and environmental concerns are driving the demand for these items in the region. Pea protein and wheat protein are the major plant protein ingredients used in manufacturing meat substitutes. Wheat protein is growing at the fastest rate, and it is expected to record a CAGR of 3.15% by volume during the forecast period. This is due to the elasticity and flexibility traits of gluten, which are present in wheat protein, specifically changing the structure of meat products. The presence of high-quality amino acid composition, which is similar to animal protein, is used in structured plant protein products.
- Animal feed remained the second-largest end-user segment. Argentina dominated the market and is expected to record a CAGR of 7.34% by value during the forecast period. Soy is a rich nutritional source with a less variable chemical composition than other protein sources. Thus, soy is widely used in feed. Soy concentrates are ideal for chicken's pre-starter meal as they contain easily digestible amino acids and aid with lipid and water retention. The high sales of proteins in this segment are attributed to the nation's massive soy production. In 2022, soybean production in Argentina was 48.95 million ton. It is expected to increase to 52.86 million ton by 2031. High soy production in the country leads to high supply volume at affordable prices. The rise in supply encourages manufacturers to incorporate soy protein instead of other ingredients in animal feed.

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Alternative protein-based food is gaining prominence across Brazil, boosting the market share of the region

- Plant protein consumption in South America is driven primarily by increasing demand for soy proteins. Over the last five years, soy, whey, and milk protein products accounted for 70% of all regional high-protein launches, but plant-based protein sources are gaining traction. Mainstream food and beverage products incorporate proteins derived from peas, rice, chia seeds, oats, and potatoes. More than 40% of Latin American consumers reported that plant-based protein improved their health. Pea and rice proteins are the most popular plant proteins on the market. Pea protein is expected to register the highest CAGR of 9.82% by volume during the forecast period. The application of plant proteins is supported by application in the F&B segment, supported by the growing protein fortification of baked products. Conventional plant proteins dominate the bakery segment, but emerging sources are also gaining traction because of their specific functional properties and nutritional value.
- Brazil claimed the largest share in 2022; plant protein in the F&B segment dominated sales in the same year. This could be attributed to the country's aging population, which is estimated to triple by 2050, encompassing around 66 million Brazilians. Consumers are increasingly adopting healthy diets. During the review period, the nation witnessed several plant protein-based product launches with the emergence of start-ups, The New Butchers, Future Farm, Behind The Foods, and Superbom. Brazil recorded the fastest growth potential among all South American countries, and it is expected to register a CAGR of 6.46% during the forecast period. The country, bearing about half of the region's population, has a vast consumer base and, thus, receives significant attention from competitors.

South America Plant Protein Ingredients Market Trends

Brazil holds the largest share in the regional plant protein consumption

- The graph illustrates the per capita consumption of plant protein across South American nations. In Brazil, agriculture and food production stand out as pivotal economic pillars. This heightened demand is largely driven by the country's aging demographic, projected to triple by 2050, encompassing approximately 66 million individuals. Plant proteins in Brazil find diverse applications, from enhancing taste and texture in protein and energy bars, breakfast cereals, and processed meats to serving as meat alternatives and muscle-gain supplements in the fitness sector. Notably, soy protein dominates the market, leading the pack, closely trailed by wheat and pea proteins.
- Argentina has seen a surge in demand for vegetable-centric dishes, attributed to over 40 million individuals adopting a vegan diet. This shift is especially pronounced in major urban centers like Buenos Aires, Cordoba, and Mendoza, where residents are turning to plant-based diets to meet their daily macronutrient needs.
- Countries like Brazil are witnessing a swift rise in the popularity of plant-based dairy products, driven by a growing segment of the population grappling with gluten and lactose intolerances. In fact, an overwhelming 80-85% of the region's populace is lactose intolerant. Consequently, the appetite for alternative dairy options is on the upswing. The uptick in sales of plant-based protein foods not only enhances diets but also aids in curbing agricultural carbon emissions. However, evolving market dynamics and escalating demand could pose sustainability challenges in supply chains. As a result, other nations in the region are mirroring Brazil's trend, advocating for increased consumption of peas and other protein sources in their daily diets.

Soy and pea production will witness significant growth during forecast period

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- South American countries have seen a surge in the cultivation of key raw materials, with soybeans, peas, and wheat taking the lead in plant protein sourcing. Notably, the soybean cultivation area in the region more than doubled from 26.4 Mha in 2000 to 55.1 Mha by 2019. However, challenges like adverse weather, particularly droughts, and geopolitical events, such as Russia's invasion of Ukraine, have led to a decline in soybean production. By February 2022, Brazil's soybean crop had reached 4,610 MBU, a significant drop from the initial January forecast of 5,162 MBU.
- Argentina stands out as a key producer of green peas, with the cultivation area for dry peas showing an upward trend, reaching 167,541 ha by 2020 after fluctuating over the 1971-2020 period. Dominating global exports with a 7% share, Argentina emerges as the primary wheat producer and exporter in the region. The nation's wheat cultivation is concentrated in three main areas: North, Central, and South (Bolsa Comercio Rosario), with the latter two regions contributing over 95% of the total production. In contrast, Brazil heavily relies on wheat imports, with 15% sourced from Paraguay, Russia, Uruguay, and Canada and a significant 75% coming from Argentina. Concerns are rising among major wheat importers, especially those dependent on Black Sea supplies, due to the Ukrainian crisis, and Argentine crop farmers are strategically planning their wheat planting. Notably, in the Pampas, Argentina's primary agricultural region, wheat has been gaining prominence in recent crop rotations.

South America Plant Protein Ingredients Industry Overview

The South America Plant Protein Ingredients Market is fragmented, with the top five companies occupying 38.41%. 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

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

3.1.9 Meat/Poultry/Seafood and Meat Alternative Products

3.1.10 RTE/RTC Food Products

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- 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 Brazil and Argentina
- 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
 - 4.2.2.1.2 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 Argentina
 - 4.3.2 Brazil
 - 4.3.3 Rest of South America

5 COMPETITIVE LANDSCAPE

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- 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 Bremil Group
 - 5.4.3 BRF S.A.
 - 5.4.4 Bunge Limited
 - 5.4.5 Ingredion Incorporated
 - 5.4.6 International Flavors & Fragrances, Inc.
 - 5.4.7 Kerry Group plc
 - 5.4.8 Sudzucker AG
 - 5.4.9 Tereos SCA

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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