

United Kingdom Plant Protein Ingredients Market Assessment, By Source [Pea Protein, Rice Protein, Soy Protein, Wheat Protein, Others] By Type [Isolates, Concentrates, Textured], By Application [Food and Beverage, Dietary Supplements, Animal Feed, Pharmaceuticals, Cosmetics and Personal Care, Others], By Region, Opportunities, and Forecast, 2016-2030F

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Abstracts

The United Kingdom Plant Protein Ingredients Market is projected to witness a CAGR of 5.6% during the forecast period 2023-2030. The market was valued at USD 353 million in 2022 and is expected to reach USD 546 million by 2030, driven by increasing consumer awareness of health and sustainability concerns, the popularity of plant-based diets, and growing demand for alternative protein sources. This trend is further supported by many individuals opting for vegetarian and vegan lifestyles.

The market offers various plant protein ingredients, including soy, pea, rice, hemp, and oat proteins. Soy protein, owing to its versatile applications and well-established market presence, has traditionally dominated the segment. However, pea protein has rapidly gained traction due to its allergen-free profile, nutritional benefits, and sustainable production methods.

The food and beverage industry has responded to this shift by incorporating plant protein ingredients into various products such as dairy alternatives, meat analogs, snacks, and nutritional supplements. Additionally, advancements in food technology have led to the development of improved textures, flavours, and functionalities of plant-

based protein products, enhancing their overall appeal to consumers.

The government's initiatives promoting healthier eating habits and sustainable food production have further accelerated the adoption of plant protein ingredients. Challenges remain regarding taste, texture, and formulation, as replicating the sensory experience of traditional animal-based products is complex. However, ongoing research and investment in this area continuously address these issues. With an expanding array of plant protein sources and increased innovation, the market is poised to expand further, offering new and exciting opportunities for manufacturers and consumers in sustainable and nutritious food options.

Sustainability Concerns Fuelling the Demand for Plant Protein Ingredients

Sustainability concerns drive a notable shift in consumer preferences within the United Kingdom's food landscape, particularly regarding protein sources. Plant protein ingredients have gained prominence due to their reduced environmental impact compared to animal-based proteins. Plant-based proteins, such as those derived from peas, soy, and lentils, require fewer natural resources, produce lower greenhouse gas emissions, and contribute to mitigating land degradation. As consumers seek more sustainable dietary choices, the appeal of plant protein ingredients has grown considerably, aligning with the country's commitment to sustainable practices and paving the way for a more environment-friendly and resilient food future.

In July 2023, Tate & Lyle plc, an international frontrunner providing ingredient solutions for healthier food and beverages, added a fresh sweetener to its lineup: TASTEVA® SOL Stevia Sweetener. Such sweeteners are generally derived from steviol glycosides extracted from stevia leaves, with a purification process to eliminate some of the inherent bitterness in the raw extract. Stevia-derived sweeteners provide a sweeter and more eco-friendly substitute for sugar.

Government Initiatives and Policies

Through various initiatives and policies, the United Kingdom government has demonstrated a proactive approach towards promoting healthier diets and sustainable food systems. Organizations like 'Greenpeace' emphasize the importance of reducing meat consumption and increasing the consumption of plant-based foods, including those containing plant protein ingredients. Additionally, in June 2021, the government proposed measures such as restricting junk food advertising before 9 p.m., aiming to encourage adopting healthier eating habits. It was planned to apply these changes in

2023; however, it later got postponed to 2025 .

The National Food Strategy highlights the significance of sustainable food production and the reduction of carbon emissions, aligning with the environmental benefits associated with plant protein ingredients. These government-driven efforts play a pivotal role in shaping consumer behaviour, fostering industry innovation, and driving the growth of the plant protein ingredients market in the UK.

Rising Health Awareness Among People

Rising health awareness is a significant driver behind the growing demand for plant protein ingredients in the United Kingdom. Consumers are increasingly mindful of their dietary choices and the impact on their overall well-being. Plant protein ingredients, derived from sources such as peas, beans, and nuts, offer a nutritious and health-promoting alternative to traditional animal-based proteins. They are often lower in saturated fats and cholesterol while rich in essential nutrients like fiber, vitamins, and minerals. As health-conscious individuals seek balanced diets to address concerns such as obesity, cardiovascular health, and diabetes, including plant protein ingredients has become a strategic choice. This trend has prompted food manufacturers to create diverse products that cater to these health-conscious consumers, contributing to the market's growth.

In July 2023, Taco Bell, the Mexican-inspired restaurant chain, introduced plant-based protein across all 132 UK locations. This move aimed at catering to the rising number of flexitarians in the country. Crafted from peas and various legumes and seasoned with Taco Bell's signature bold flavours, the plant-based protein can serve as a meat substitute in any menu item without incurring additional costs.

Pea Protein is the Fastest Growing Protein Type

Although soy protein dominates the market, pea protein has emerged as the fastest-growing protein type in the United Kingdom's plant protein ingredients market. Its rapid ascent can be attributed to a confluence of factors that align with evolving consumer preferences and dietary trends. With increasing numbers of individuals adopting vegan, vegetarian, and flexitarian lifestyles, pea protein has gained traction due to its natural origin, allergen-friendly profile, and sustainable production methods. As consumers prioritize health and sustainability, the nutritional benefits of pea protein, including its high protein content and amino acid profile, have propelled it into the spotlight. The United Kingdom imports around 4 million tonnes of soy annually, primarily for human

and animal consumption. Notably, half a million tonnes are dedicated to vegan and vegetarian food products. To potentially reduce the UK's reliance on soy imports, in May 2023, a pioneering USD 1.28 million 'Pea Protein' project was declared to develop homegrown tasteless peas that maintain their nutritional value. This initiative can substantially reduce domestic soy requirements.

Impact of COVID-19

The COVID-19 pandemic exerted a complex impact on the United Kingdom plant protein ingredients market. As health concerns surged, consumers turned towards plant-based diets for their perceived health benefits, driving demand for products containing plant protein ingredients. Home cooking trends during lockdowns also stimulated interest in plant-based options. However, disruptions in supply chains posed challenges to ingredient availability, potentially affecting production and distribution. The closure of food service establishments initially dampened demand for plant protein ingredient-containing products in this sector. Economic uncertainties and shifts in consumer spending patterns further influenced the market dynamics. Despite these hurdles, the plant protein ingredients market demonstrated adaptability, leveraging e-commerce platforms and prioritizing health-conscious consumption trends. To comprehend the precise repercussions, current industry insights, research reports, and market analyses offer a comprehensive perspective.

Key Players Landscape and Outlook

The market exhibits a dynamic landscape with various key players influencing its trajectory. Established industry leaders like Tate & Lyle plc, Kerry Group plc, and Cargill, Incorporated are complemented by several startups, showcasing innovation and diverse product offerings. The market holds promising prospects driven by increasing health awareness, environmental concerns, and plant-based dietary trends. The focus on sustainability, nutritional benefits, and partnerships for innovation are likely to shape the market's growth. Regulatory factors and evolving consumer preferences will further influence the market's direction, making it a pivotal and evolving sector within the UK's food industry. Companies are pursuing M&A as a strategic move to expand their product portfolios, enter new markets, and enhance their capabilities. In May 2022, Tate & Lyle plc (Tate & Lyle), a prominent worldwide supplier of ingredients and solutions for the food and beverage industry, revealed the acquisition of a significant portion of Nutriati's assets. Nutriati, an innovator in ingredient technology, specializes in developing and producing chickpea protein and flour.

Contents

1. RESEARCH METHODOLOGY

2. PROJECT SCOPE & DEFINITIONS

3. IMPACT OF COVID-19 ON UNITED KINGDOM PLANT PROTEIN INGREDIENTS MARKET

4. EXECUTIVE SUMMARY

5. VOICE OF CUSTOMER

5.1. Demographics (Age/Cohort Analysis – Baby Boomers and Gen X, Millennials, Gen Z; Gender; Income – Low, Mid and High; Geography; Nationality; etc.)

5.2. Market Awareness and Product Information

5.3. Brand Awareness and Loyalty

5.4. Factors Considered in Purchase Decision

5.4.1. Brand Name

5.4.2. Pack Size

5.4.3. Price

5.4.4. Customisation Options

5.4.5. Packaging Type

5.4.6. Inclination Towards Organic Products

5.4.7. Promotional Offers & Discounts

5.5. Ingredient Sourcing

5.6. Allergen Considerations

5.7. Frequency of Purchase

5.8. Medium of Purchase

5.9. Role of Brand Ambassador or Influencer Marketing on Product/Brand Absorption

6. UNITED KINGDOM PLANT PROTEIN INGREDIENTS MARKET OUTLOOK, 2016-2030F

6.1. Market Size & Forecast

6.1.1. By Value

6.1.2. By Volume

6.2. By Source

6.2.1. Pea Protein

- 6.2.2. Rice Protein
- 6.2.3. Soy Protein
- 6.2.4. Wheat Protein
- 6.2.5. Others
- 6.3. By Type
 - 6.3.1. Isolates
 - 6.3.2. Concentrates
 - 6.3.3. Textured
- 6.4. By Application
 - 6.4.1. Food and Beverage
 - 6.4.1.1. Meat Alternatives
 - 6.4.1.2. Dairy Alternatives
 - 6.4.1.3. Packaged Food
 - 6.4.1.4. Bakery and Confectionery
 - 6.4.1.5. Functional Beverages
 - 6.4.1.6. Others
 - 6.4.2. Dietary Supplements
 - 6.4.2.1. Protein Powders
 - 6.4.2.2. Protein Bars
 - 6.4.2.3. Others
 - 6.4.3. Animal Feed
 - 6.4.3.1. Livestock
 - 6.4.3.2. Aquaculture
 - 6.4.4. Pharmaceuticals
 - 6.4.5. Cosmetics and Personal Care
 - 6.4.6. Others
- 6.5. By Region
 - 6.4.1. England
 - 6.4.2. Scotland
 - 6.4.3. Wales
 - 6.4.4. Northern Ireland
- 6.6. By Company Market Share (%), 2022

7. MARKET MAPPING, 2022

- 7.1. By Source
- 7.2. By Type
- 7.3. By Application
- 7.4. By Region

8. MACRO ENVIRONMENT AND INDUSTRY STRUCTURE

- 8.1. Supply Demand Analysis
- 8.2. Import Export Analysis
- 8.3. Value Chain Analysis
- 8.4. PESTEL Analysis
 - 8.4.1. Political Factors
 - 8.4.2. Economic System
 - 8.4.3. Social Implications
 - 8.4.4. Technological Advancements
 - 8.4.5. Environmental Impacts
 - 8.4.6. Legal Compliances and Regulatory Policies (Statutory Bodies Included)
- 8.5. Porter's Five Forces Analysis
 - 8.5.1. Supplier Power
 - 8.5.2. Buyer Power
 - 8.5.3. Substitution Threat
 - 8.5.4. Threat from New Entrant
 - 8.5.5. Competitive Rivalry

9. MARKET DYNAMICS

- 9.1. Growth Drivers
- 9.2. Growth Inhibitors (Challenges and Restraints)

10. KEY PLAYERS LANDSCAPE

- 10.1. Competition Matrix of Top Five Market Leaders
- 10.2. Market Revenue Analysis of Top Five Market Leaders (in %, 2022)
- 10.3. Mergers and Acquisitions/Joint Ventures (If Applicable)
- 10.4. SWOT Analysis (For Five Market Players)
- 10.5. Patent Analysis (If Applicable)

11. PRICING ANALYSIS

12. CASE STUDIES

13. KEY PLAYERS OUTLOOK

13.1. Ingredion Incorporated

13.1.1. Company Details

13.1.2. Key Management Personnel

13.1.3. Products & Services

13.1.4. Financials (As reported)

13.1.5. Key Market Focus & Geographical Presence

13.1.6. Recent Developments

13.2. Tate & Lyle plc

13.3. Cargill, Incorporated

13.4. Kerry Group plc

13.5. DuPont de Nemours, Inc.

13.6. Glanbia plc

13.7. Archer Daniels Midland Company

13.8. Roquette Freres SA (Roquette)

13.9. Axiom Foods, Inc.

13.10. Healy Group

*Companies mentioned above DO NOT hold any order as per market share and can be changed as per information available during research work

14. STRATEGIC RECOMMENDATIONS

15. ABOUT US & DISCLAIMER

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