

Plant-Based Protein Market by Source (Soy, Wheat, Pea, Canola Rice & Potato, Beans & Seeds, Fermented Protein), Type (Concentrates, Isolates, Textured), Form (Dry, Liquid), Nature (Conventional, Organic), Application and Region - Global Forecast to 2028

<https://marketpublishers.com/r/P2D0328B98E7EN.html>

Date: November 2023

Pages: 380

Price: US\$ 4,950.00 (Single User License)

ID: P2D0328B98E7EN

Abstracts

The global market for plant-based protein is estimated to be valued at USD 13.3 billion in 2023 and is projected to reach USD 19.2 billion by 2028, at a CAGR of 7.7% during the forecast period. The increasing awareness about health and changing consumer preferences have spurred the demand for plant-based protein products. To boost sales in this market, it is essential to implement effective marketing strategies such as diversification and segmentation. The primary goal is to create a stronger demand among health-conscious individuals, vegetarians, flexitarians, and vegans by positioning the product strategically within the right sales channels.

Utilizing a well-thought-out promotional mix can open growth opportunities within the plant-based protein market. Producers of products like pea protein or soy protein have seen remarkable success by correctly positioning their brands within the plant-based protein category. The rise in health consciousness and evolving lifestyles have driven significant growth in this market. Furthermore, the ongoing efforts by plant-based protein manufacturers to offer innovative flavors, extend product shelf life, and improve nutritional profiles have set the stage for substantial market expansion in the years to come.

Nonetheless, it is worth noting that the high cost of production and potential challenges related to raw material availability can act as constraints in the plant-based protein market. Despite these hurdles, the growing demand for healthier and sustainable protein sources suggests a promising future for the industry.

“The concentrates sub-segment in the type of segment is estimated to reach at a USD 8.5 billion during the forecast period.”

Plant-based protein concentrates play a pivotal role in the growth of the plant-based protein market, as they are derived from various sources like soybeans, peas, and wheat, and undergo processing to enhance their protein content, typically ranging from 40% to 90%. These concentrates are known for their notable qualities, including excellent water-holding and emulsification properties, as well as their ability to control expansion in extruded snacks. The food industry is expected to maintain a high production of plant protein concentrates due to increased protein consumption and the growing use of plant-derived proteins in food products, particularly in developing nations.

The demand for plant-based protein concentrates has surged in recent years due to their versatility in various food categories such as baked goods, snacks, cereals, soups, pasta, sauces, and plant-based dairy and meat alternatives. Companies are also introducing innovative products derived from alternative sources like chickpeas and oats to capitalize on expanding business opportunities. The prevalence of dietary preferences like vegetarianism, veganism, and flexitarianism has further driven the demand for plant-based proteins. This rising demand has spurred innovation in the food industry, resulting in a wide range of plant-based protein products, including burgers and meat substitutes, many of which rely on plant-based protein concentrates to deliver quality and taste. For instance, in February 2019, InnovoPro, an Israeli company, launched CP-Pro 70, claiming to be the first to offer a chickpea concentrate product range, aiming to tap into the growing market for plant-based protein in sports nutrition supplements.

“The organic sub-segment of nature segment is projected to grow at the highest CAGR of 8.1% during the forecast period.

The demand for organic plant-based proteins has been steadily increasing, particularly following the COVID-19 pandemic. Consumers are gravitating towards clean label and organic ingredients, considering them safer and more nutritious compared to conventional proteins. Organic options offer greater transparency regarding their source. Many plant-based food consumers are conscious of product labeling and have a strong environmental focus, making organic plant-based proteins particularly appealing to this demographic. While the organic plant-based protein market is still in its early stages, it has experienced substantial growth recently. Numerous manufacturers

have expanded their product offerings to include organic plant-based proteins to meet this growing demand.

For example, in October 2022, Roquette Frise (France) introduced a new line of organic pea ingredients, including organic pea starch and organic pea protein. These ingredients are sourced from a network of organic pea growers in Canada and produced at their facility in Portage la Prairie, Manitoba. Nature Zen (Canada) also seized the opportunity by launching organic, high-quality plant-based protein in the US market in August 2021, capitalizing on the surge in demand for organic food and ingredients. Orgain (US), a company specializing in organic nutritional products, entered the market with its organic plant-based protein powder in chocolate peanut butter cups at Costco in January 2020. This product launch aimed to meet the increasing demand from health-conscious millennials for products with simpler and fewer ingredients. The trend toward clean-label products and the desire for greater food source transparency are expected to provide significant growth opportunities for the organic plant-based protein market in the coming years. The strategies adopted by these companies, expanding their product lines to include organic plant-based proteins, align with the growing consumer demand for such products.

“Europe to grow at the CAGR of 7.3% during the forecast period, in plant-based protein market to reach a value of USD 6.3 billion by 2028.”

The European market offers substantial business prospects for plant-based protein ingredient manufacturers. The growing trend of embracing veganism in the region is contributing to increased demand for plant-based protein.

The European plant-based protein market can be categorized into food and feed applications. The rise of new manufacturers of final products and the acceptance of plant-based protein as a viable alternative have resulted in a higher number of product launches. Additionally, the surge in veganism, driven by concerns about sustainability and health, is having a significant impact, not only in the consumer sector but also in the industrial sector, prompting adjustments to product portfolios and processing methods.

The growing shift toward veganism and away from animal-based meat has created significant business opportunities for companies in the plant-based protein industry. According to the Organization for Economic Co-operation and Development-Food and Agriculture Organization (OECD-FAO) Agricultural Outlook 2021-2030, per capita consumption of pork, beef, and lamb is expected to decrease considerably by 2030 in Europe and other developed nations. The European market benefits from the presence

of several prominent players in the industry, such as Glanbia plc (Ireland), Roquette Frères (France), and Kerry Group PLC (Ireland). These manufacturers are actively seeking ways to strengthen their market position, including launching new products, expanding production capabilities, and forming partnerships or making acquisitions with other industry players to enhance their geographical presence and establish a firm foothold in the European plant-based protein industry. For instance, in June 2020, Kerry Group PLC (Ireland) announced the expansion of their plant protein range sourced from peas, rice, and sunflowers in response to rising customer demand in Europe and the increasing popularity of plant-based products like nutritional bars, yogurts, juices, and smoothies.

The break-up of the profile of primary participants in the plant-based protein market:

By Company Type: Tier 1 – 25%, Tier 2 - 45%, Tier 3 – 30%

By Designation: CXO's level – 20%, Managers- 50%, Executives – 30%

By Region: North America -25%, Europe – 25%, Asia Pacific – 40%, RoW- 10%

Research Coverage:

This research report categorizes the plant-based protein market by Source (soy, wheat, pea, canola rice & potato, beans & seeds, fermented protein, and other sources), by Type (concentrates, isolates, textured), by Form (dry, liquid), by Nature (conventional, organic), by application (food & beverages, feed) and by region (North America, Europe, Asia Pacific, South America, RoW). The scope of the report covers detailed information regarding the major factors, such as drivers, restraints, challenges, and opportunities, influencing the growth of the plant-based protein market. A detailed analysis of the key industry players has been done to provide insights into their business overview, services, key strategies, contracts, partnerships, and agreements. New service launches, mergers and acquisitions, and recent developments associated with the plant-based protein market. Competitive analysis of upcoming startups in the plant-based protein market ecosystem is covered in this report.

Reasons to buy this report:

The report will help the market leaders/new entrants in this market with information on the closest approximations of the revenue numbers for the overall plant-based protein

market and the subsegments. This report will help stakeholders understand the competitive landscape and gain more insights to position their businesses better and plan suitable go-to-market strategies. The report also helps stakeholders understand the pulse of the market and provides them with information on key market drivers, restraints, challenges, and opportunities.

The report provides insights on the following pointers:

Analysis of key drivers (Growing interest in health-centric food and beverages, Innovation & developments related to plant-based protein to augment vegan trend), restraints (Allergies associated with plant-based protein sources, such as soy and wheat, Possibilities of nutritional & vitamin deficiencies among vegans), opportunities (Focus on aquatic plants as new & emerging sources of protein), and challenges (Concerns over quality of food & beverages due to GM ingredients adulteration, Economic constraints related to processing capacity of pea protein) influencing the growth of the plant-based protein market.

New product launch/Innovation: Detailed insights on research & development activities, and new product launches in the plant-based protein market.

Market Development: Comprehensive information about lucrative markets – the report analyses the plant-based protein market across varied regions.

Market Diversification: Exhaustive information about new services, untapped geographies, recent developments, and investments in the plant-based protein market.

Competitive Assessment: In-depth assessment of market shares, growth strategies and product offerings of leading players like ADM (US), Cargill, Incorporated (US), International Flavors & Fragrances Inc. (US), Ingredion (US), Roquette Frères (France) and others in the plant-based protein market strategies.

Contents

1 INTRODUCTION

- 1.1 STUDY OBJECTIVES
- 1.2 MARKET DEFINITION
- 1.3 STUDY SCOPE
 - 1.3.1 MARKET SEGMENTATION
 - 1.3.2 INCLUSIONS & EXCLUSIONS
 - 1.3.3 REGIONS COVERED
- 1.4 YEARS CONSIDERED
- 1.5 CURRENCY CONSIDERED
- TABLE 1 USD EXCHANGE RATES, 2018–2022
- 1.6 UNIT CONSIDERED
- 1.7 STAKEHOLDERS
- 1.8 SUMMARY OF CHANGES
- 1.9 RECESSION IMPACT

2 RESEARCH METHODOLOGY

- 2.1 RESEARCH DATA
 - FIGURE 1 RESEARCH DESIGN
 - 2.1.1 SECONDARY DATA
 - 2.1.1.1 Key data from secondary sources
 - 2.1.2 PRIMARY DATA
 - 2.1.2.1 Key data from primary sources
 - 2.1.2.2 Breakdown of primary interviews
 - FIGURE 2 BREAKDOWN OF PRIMARY INTERVIEWS, BY COMPANY TYPE, DESIGNATION, AND REGION
 - 2.1.2.3 Key primary insights
 - 2.2 MARKET SIZE ESTIMATION
 - 2.2.1 BOTTOM-UP APPROACH
 - FIGURE 3 MARKET SIZE ESTIMATION METHODOLOGY: BOTTOM-UP APPROACH
 - 2.2.2 TOP-DOWN APPROACH
 - FIGURE 4 MARKET SIZE ESTIMATION METHODOLOGY: TOP-DOWN APPROACH
 - 2.3 DATA TRIANGULATION
 - FIGURE 5 DATA TRIANGULATION METHODOLOGY
 - 2.4 RESEARCH ASSUMPTIONS
 - 2.5 LIMITATIONS AND RISK ASSESSMENT

2.6 RECESSION IMPACT ANALYSIS

2.6.1 MACROECONOMIC INDICATORS OF RECESSION

FIGURE 6 MACROECONOMIC INDICATORS OF RECESSION

FIGURE 7 GLOBAL INFLATION RATE, 2011–2022

FIGURE 8 GLOBAL GDP, 2011–2022 (USD TRILLION)

FIGURE 9 RECESSION INDICATORS AND THEIR IMPACT ON PLANT-BASED PROTEIN MARKET

FIGURE 10 GLOBAL PLANT-BASED PROTEIN MARKET: PREVIOUS FORECAST VS. RECESSION IMPACT FORECAST

3 EXECUTIVE SUMMARY

TABLE 2 PLANT-BASED PROTEIN MARKET SNAPSHOT, 2023 VS. 2028

FIGURE 11 PLANT-BASED PROTEIN MARKET SNAPSHOT, BY SOURCE, 2023 VS. 2028

FIGURE 12 PLANT-BASED PROTEIN MARKET, BY APPLICATION, 2023 VS. 2028 (USD MILLION)

FIGURE 13 PLANT-BASED PROTEIN MARKET, BY TYPE, 2023 VS. 2028 (USD MILLION)

FIGURE 14 PLANT-BASED PROTEIN MARKET, BY REGION

4 PREMIUM INSIGHTS

4.1 ATTRACTIVE OPPORTUNITIES FOR PLAYERS IN PLANT-BASED PROTEIN MARKET

FIGURE 15 RISING DEMAND DUE TO INCREASING HEALTH AWARENESS AND ENVIRONMENTAL CONCERNS TO DRIVE MARKET

4.2 NORTH AMERICA: PLANT-BASED PROTEIN MARKET, BY FORM AND COUNTRY

FIGURE 16 DRY SEGMENT AND US TO ACCOUNT FOR SIGNIFICANT SHARE IN 2023

4.3 PLANT-BASED PROTEIN MARKET, BY APPLICATION AND REGION

FIGURE 17 FOOD & BEVERAGES SEGMENT TO DOMINATE MOST REGIONS DURING FORECAST PERIOD

4.4 PLANT-BASED PROTEIN MARKET: KEY COUNTRIES, 2022

FIGURE 18 US DOMINATED PLANT-BASED PROTEIN MARKET IN 2022

5 MARKET OVERVIEW

5.1 INTRODUCTION

5.2 MACROECONOMIC INDICATORS

5.2.1 RISE IN FOOD DEMAND FROM GROWING POPULATION

FIGURE 19 POPULATION PROJECTED TO REACH MORE THAN 9.5 BILLION BY 2050

5.2.2 INCREASE IN SOYBEAN PRODUCTION

FIGURE 20 SOYBEAN PRODUCTION, BY KEY COUNTRY, 2016–2020 (MILLION TON)

5.2.3 CONSUMER SHIFT TOWARD PLANT-BASED NUTRITION

5.3 MARKET DYNAMICS

FIGURE 21 PLANT-BASED PROTEIN MARKET: DRIVERS, RESTRAINTS, OPPORTUNITIES, AND CHALLENGES

5.3.1 DRIVERS

5.3.1.1 Growth in consumer preference for vegan diet

5.3.1.1.1 Growing interest in health-centric food and beverages

5.3.1.1.2 Awareness regarding meat alternatives' role in environmental sustainability

FIGURE 22 US: SALES OF PLANT-BASED MEAT ALTERNATIVES, 2019–2022

5.3.1.1.3 Innovation and developments related to plant-based protein to augment vegan trend

5.3.1.2 Prevalence of lactose intolerance

TABLE 3 RATE OF LACTOSE INTOLERANCE, BY COUNTRY

5.3.2 RESTRAINTS

5.3.2.1 Allergies associated with plant-based protein sources, such as soy and wheat

FIGURE 23 US: POPULATION WITH FOOD ALLERGIES, BY ALLERGEN, 2018–2019 (MILLION)

5.3.2.2 Possibility of nutritional deficiencies among vegans

5.3.3 OPPORTUNITIES

5.3.3.1 Emergence of aquatic plants as new sources of protein

5.3.3.2 Effective marketing strategies and correct positioning of plant-based proteins

5.3.3.3 Changes in consumer lifestyles

5.3.4 CHALLENGES

5.3.4.1 Concerns over quality of food and beverages due to adulteration of GM ingredients

5.3.4.2 Economic constraints related to processing capacity of pea protein

5.3.4.3 Concerns regarding taste and texture of plant-based protein

6 INDUSTRY TRENDS

6.1 INTRODUCTION

6.2 SUPPLY CHAIN ANALYSIS

FIGURE 24 SUPPLY CHAIN ANALYSIS

6.3 VALUE CHAIN ANALYSIS

6.3.1 RESEARCH AND PRODUCT DEVELOPMENT

6.3.2 RAW MATERIAL SOURCING

6.3.3 PRODUCTION & PROCESSING

6.3.4 DISTRIBUTION

6.3.5 MARKETING & SALES

6.3.6 END USERS

FIGURE 25 VALUE CHAIN ANALYSIS

6.4 TRADE ANALYSIS

6.4.1 SOYBEAN

TABLE 4 TOP TEN IMPORTERS AND EXPORTERS OF SOYBEAN, 2022 (KT)

6.4.2 PEA

TABLE 5 TOP 10 IMPORTERS AND EXPORTERS OF PEA, 2021 (KT)

6.4.3 RICE

TABLE 6 TOP TEN IMPORTERS AND EXPORTERS OF RICE, 2022 (KT)

6.5 TECHNOLOGY ANALYSIS

6.5.1 EXTRUSION

6.5.2 HIGH-PRESSURE PROCESSING (HPP)

6.5.3 TECHNOLOGICAL ADVANCEMENTS WITHIN EXTRUSION PROCESS

6.6 PRICING ANALYSIS

6.6.1 AVERAGE SELLING PRICE TRENDS OF KEY PLAYERS, BY SOURCE

FIGURE 26 AVERAGE SELLING PRICE TRENDS OF KEY PLAYERS, BY SOURCE (USD/KG)

TABLE 7 AVERAGE SELLING PRICE TRENDS, BY REGION, 2021–2028 (USD/TON)

TABLE 8 AVERAGE SELLING PRICE TRENDS, BY SOURCE, 2021–2028 (USD/TON)

6.7 ECOSYSTEM ANALYSIS

6.7.1 DEMAND SIDE

6.7.2 SUPPLY SIDE

FIGURE 27 PLANT-BASED PROTEIN: MARKET MAP

FIGURE 28 ECOSYSTEM MAPPING

TABLE 9 ROLE OF PLAYERS IN MARKET ECOSYSTEM

6.8 TRENDS/DISRUPTIONS IMPACTING CUSTOMERS' BUSINESSES

FIGURE 29 TRENDS/DISRUPTIONS IMPACTING CUSTOMERS' BUSINESSES

6.9 PATENT ANALYSIS

TABLE 10 LIST OF MAJOR PATENTS PERTAINING TO PLANT-BASED PROTEIN MARKET, 2013–2023

FIGURE 30 NUMBER OF PATENTS GRANTED, 2013–2022

FIGURE 31 REGIONAL ANALYSIS OF PATENTS GRANTED

6.10 KEY CONFERENCES & EVENTS

TABLE 11 LIST OF KEY CONFERENCES & EVENTS, 2023–2025

6.11 TARIFF & REGULATORY LANDSCAPE

6.11.1 REGULATORY LANDSCAPE

6.11.1.1 North America

6.11.1.2 Europe

6.11.1.3 Asia Pacific

6.11.2 REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS

TABLE 12 LIST OF REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS

6.12 PORTER'S FIVE FORCES ANALYSIS

TABLE 13 PORTER'S FIVE FORCES ANALYSIS

6.12.1 THREAT OF NEW ENTRANTS

6.12.2 THREAT OF SUBSTITUTES

6.12.3 BARGAINING POWER OF SUPPLIERS

6.12.4 BARGAINING POWER OF BUYERS

6.12.5 INTENSITY OF COMPETITIVE RIVALRY

6.13 KEY STAKEHOLDERS & BUYING CRITERIA

6.13.1 KEY STAKEHOLDERS IN BUYING PROCESS

FIGURE 32 INFLUENCE OF STAKEHOLDERS ON BUYING PROCESS FOR TOP THREE SOURCES

TABLE 14 INFLUENCE OF STAKEHOLDERS ON BUYING PROCESS FOR TOP THREE SOURCES

6.13.2 BUYING CRITERIA

TABLE 15 KEY CRITERIA FOR SELECTING SUPPLIER/VENDOR

FIGURE 33 KEY CRITERIA FOR SELECTING SUPPLIER/VENDOR

6.14 CASE STUDY ANALYSIS

6.14.1 BLUE DIAMOND GROWERS PARTNERED WITH GROUP LALA TO ESTABLISH NETWORK IN MEXICO

6.14.2 KERRY GROUP PLC REVOLUTIONIZED PLANT-BASED PRODUCTS IN ASIA PACIFIC MARKET

6.14.3 ADM OFFERED NEW PLANT-BASED PROTEINS TO MEET GROWING CONSUMER DEMAND

6.14.4 GLANBIA LAUNCHED ITS GRAIN PORTFOLIO TO ADDRESS CONSUMERS' RISING HEALTH CONCERNS

7 PLANT-BASED PROTEIN MARKET, BY SOURCE

7.1 INTRODUCTION

FIGURE 34 PLANT-BASED PROTEIN MARKET, BY SOURCE, 2023 VS. 2028 (USD MILLION)

TABLE 16 PLANT-BASED PROTEIN MARKET, BY SOURCE, 2018–2022 (USD MILLION)

TABLE 17 PLANT-BASED PROTEIN MARKET, BY SOURCE, 2023–2028 (USD MILLION)

TABLE 18 PLANT-BASED PROTEIN MARKET, BY SOURCE, 2018–2022 (KT)

TABLE 19 PLANT-BASED PROTEIN MARKET, BY SOURCE, 2023–2028 (KT)

7.2 SOY

7.2.1 SURGE IN DEMAND FOR PLANT-BASED PROTEIN ALTERNATIVES AND INCREASING SOY EXPORTS TO LEAD TO MARKET GROWTH

TABLE 20 SOY: PLANT-BASED PROTEIN MARKET, BY REGION, 2018–2022 (USD MILLION)

TABLE 21 SOY: PLANT-BASED PROTEIN MARKET, BY REGION, 2023–2028 (USD MILLION)

TABLE 22 SOY: PLANT-BASED PROTEIN MARKET, BY REGION, 2018–2022 (KT)

TABLE 23 SOY: PLANT-BASED PROTEIN MARKET, BY REGION, 2023–2028 (KT)

7.3 WHEAT

7.3.1 EXCELLENT BINDING CHARACTERISTICS OF WHEAT COUPLED WITH ITS INCREASED USAGE IN ALTERNATIVE MEAT PRODUCTS TO DRIVE GROWTH

TABLE 24 WHEAT: PLANT-BASED PROTEIN MARKET, BY REGION, 2018–2022 (USD MILLION)

TABLE 25 WHEAT: PLANT-BASED PROTEIN MARKET, BY REGION, 2023–2028 (USD MILLION)

TABLE 26 WHEAT: PLANT-BASED PROTEIN MARKET, BY REGION, 2018–2022 (KT)

TABLE 27 WHEAT: PLANT-BASED PROTEIN MARKET, BY REGION, 2023–2028 (KT)

7.4 PEA

7.4.1 RAPID SHIFT OF CONSUMERS FROM TRADITIONAL SOURCES OF PLANT PROTEIN TO DRIVE POPULARITY OF PEA PROTEIN

TABLE 28 PEA: PLANT-BASED PROTEIN MARKET, BY REGION, 2018–2022 (USD MILLION)

TABLE 29 PEA: PLANT-BASED PROTEIN MARKET, BY REGION, 2023–2028 (USD MILLION)

TABLE 30 PEA: PLANT-BASED PROTEIN MARKET, BY REGION, 2018–2022 (KT)

TABLE 31 PEA: PLANT-BASED PROTEIN MARKET, BY REGION, 2023–2028 (KT)

TABLE 32 PEA: PLANT-BASED PROTEIN MARKET, BY SUBTYPE, 2018–2022 (USD

MILLION)

TABLE 33 PEA: PLANT-BASED PROTEIN MARKET, BY SUBTYPE, 2023–2028 (USD MILLION)

7.4.2 YELLOW SPLIT PEAS

TABLE 34 YELLOW SPLIT PEAS: PLANT-BASED PROTEIN MARKET, BY REGION, 2018–2022 (USD MILLION)

TABLE 35 YELLOW SPLIT PEAS: PLANT-BASED PROTEIN MARKET, BY REGION, 2023–2028 (USD MILLION)

7.4.3 CHICKPEAS

TABLE 36 CHICKPEAS: PLANT-BASED PROTEIN MARKET, BY REGION, 2018–2022 (USD MILLION)

TABLE 37 CHICKPEAS: PLANT-BASED PROTEIN MARKET, BY REGION, 2023–2028 (USD MILLION)

7.4.4 LENTILS

TABLE 38 LENTILS: PLANT-BASED PROTEIN MARKET, BY REGION, 2018–2022 (USD MILLION)

TABLE 39 LENTILS: PLANT-BASED PROTEIN MARKET, BY REGION, 2023–2028 (USD MILLION)

7.5 CANOLA, RICE, AND POTATO

7.5.1 GROWING CONSUMER INTEREST IN TRADITIONAL PLANT-BASED PROTEIN PRODUCTS TO SPUR MARKET

TABLE 40 CANOLA, RICE, AND POTATO: PLANT-BASED PROTEIN MARKET, BY REGION, 2018–2022 (USD MILLION)

TABLE 41 CANOLA, RICE, AND POTATO: PLANT-BASED PROTEIN MARKET, BY REGION, 2023–2028 (USD MILLION)

TABLE 42 CANOLA, RICE, AND POTATO: PLANT-BASED PROTEIN MARKET, BY REGION, 2018–2022 (KT)

TABLE 43 CANOLA, RICE, AND POTATO: PLANT-BASED PROTEIN MARKET, BY REGION, 2023–2028 (KT)

7.6 BEANS & SEEDS

7.6.1 RISING DEMAND FOR HEMP PROTEIN AND SUNFLOWER SEED PROTEIN AS EFFECTIVE TOOLS AGAINST CARDIOVASCULAR DISEASES TO DRIVE GROWTH

TABLE 44 BEANS & SEEDS: PLANT-BASED PROTEIN MARKET, BY REGION, 2018–2022 (USD MILLION)

TABLE 45 BEANS & SEEDS: PLANT-BASED PROTEIN MARKET, BY REGION, 2023–2028 (USD MILLION)

TABLE 46 BEANS & SEEDS: PLANT-BASED PROTEIN MARKET, BY REGION, 2018–2022 (KT)

TABLE 47 BEANS & SEEDS: PLANT-BASED PROTEIN MARKET, BY REGION, 2023–2028 (KT)

7.7 FERMENTED PROTEIN

7.7.1 FLAVOR AND MOUTHFEEL OF FERMENTED PLANT-BASED PROTEIN TO SURGE DEMAND

TABLE 48 FERMENTED PROTEIN: PLANT-BASED PROTEIN MARKET, BY REGION, 2018–2022 (USD MILLION)

TABLE 49 FERMENTED PROTEIN: PLANT-BASED PROTEIN MARKET, BY REGION, 2023–2028 (USD MILLION)

TABLE 50 FERMENTED PROTEIN: PLANT-BASED PROTEIN MARKET, BY REGION, 2018–2022 (KT)

TABLE 51 FERMENTED PROTEIN: PLANT-BASED PROTEIN MARKET, BY REGION, 2023–2028 (KT)

TABLE 52 FERMENTED PROTEIN: PLANT-BASED PROTEIN MARKET, BY SUBTYPE, 2018–2022 (USD MILLION)

TABLE 53 FERMENTED PROTEIN: PLANT-BASED PROTEIN MARKET, BY SUBTYPE, 2023–2028 (USD MILLION)

7.7.2 SOY

TABLE 54 FERMENTED SOY PROTEIN: PLANT-BASED PROTEIN MARKET, BY REGION, 2018–2022 (USD MILLION)

TABLE 55 FERMENTED SOY PROTEIN: PLANT-BASED PROTEIN MARKET, BY REGION, 2023–2028 (USD MILLION)

7.7.3 PEA

TABLE 56 FERMENTED PEA PROTEIN: PLANT-BASED PROTEIN MARKET, BY REGION, 2018–2022 (USD MILLION)

TABLE 57 FERMENTED PEA PROTEIN: PLANT-BASED PROTEIN MARKET, BY REGION, 2023–2028 (USD MILLION)

7.7.4 RICE

TABLE 58 FERMENTED RICE PROTEIN: PLANT-BASED PROTEIN MARKET, BY REGION, 2018–2022 (USD MILLION)

TABLE 59 FERMENTED RICE PROTEIN: PLANT-BASED PROTEIN MARKET, BY REGION, 2023–2028 (USD MILLION)

7.7.5 OTHER FERMENTED PROTEIN SUBTYPES

TABLE 60 OTHER FERMENTED PROTEIN SUBTYPES: PLANT-BASED PROTEIN MARKET, BY REGION, 2018–2022 (USD MILLION)

TABLE 61 OTHER FERMENTED PROTEIN SUBTYPES: PLANT-BASED PROTEIN MARKET, BY REGION, 2023–2028 (USD MILLION)

7.8 OTHER SOURCES

TABLE 62 OTHER SOURCES: PLANT-BASED PROTEIN MARKET, BY REGION,

2018–2022 (USD MILLION)

TABLE 63 OTHER SOURCES: PLANT-BASED PROTEIN MARKET, BY REGION, 2023–2028 (USD MILLION)

TABLE 64 OTHER SOURCES: PLANT-BASED PROTEIN MARKET, BY REGION, 2018–2022 (KT)

TABLE 65 OTHER SOURCES: PLANT-BASED PROTEIN MARKET, BY REGION, 2023–2028 (KT)

8 PLANT-BASED PROTEIN MARKET, BY TYPE

8.1 INTRODUCTION

FIGURE 35 PLANT-BASED PROTEIN MARKET, BY TYPE, 2023 VS. 2028 (USD MILLION)

TABLE 66 PLANT-BASED PROTEIN MARKET, BY TYPE, 2018–2022 (USD MILLION)

TABLE 67 PLANT-BASED PROTEIN MARKET, BY TYPE, 2023–2028 (USD MILLION)

TABLE 68 SOY: PLANT-BASED PROTEIN MARKET, BY TYPE, 2018–2022 (USD MILLION)

TABLE 69 SOY: PLANT-BASED PROTEIN MARKET, BY TYPE, 2023–2028 (USD MILLION)

TABLE 70 WHEAT: PLANT-BASED PROTEIN MARKET, BY TYPE, 2018–2022 (USD MILLION)

TABLE 71 WHEAT: PLANT-BASED PROTEIN MARKET, BY TYPE, 2023–2028 (USD MILLION)

TABLE 72 PEA: PLANT-BASED PROTEIN MARKET, BY TYPE, 2018–2022 (USD MILLION)

TABLE 73 PEA: PLANT-BASED PROTEIN MARKET, BY TYPE, 2023–2028 (USD MILLION)

TABLE 74 CANOLA, RICE, AND POTATO: PLANT-BASED PROTEIN MARKET, BY TYPE, 2018–2022 (USD MILLION)

TABLE 75 CANOLA, RICE, AND POTATO: PLANT-BASED PROTEIN MARKET, BY TYPE, 2023–2028 (USD MILLION)

TABLE 76 BEANS & SEEDS: PLANT-BASED PROTEIN MARKET, BY TYPE, 2018–2022 (USD MILLION)

TABLE 77 BEANS & SEEDS: PLANT-BASED PROTEIN MARKET, BY TYPE, 2023–2028 (USD MILLION)

TABLE 78 FERMENTED PROTEIN: PLANT-BASED PROTEIN MARKET, BY TYPE, 2018–2022 (USD MILLION)

TABLE 79 FERMENTED PROTEIN: PLANT-BASED PROTEIN MARKET, BY TYPE, 2023–2028 (USD MILLION)

TABLE 80 OTHER SOURCES: PLANT-BASED PROTEIN MARKET, BY TYPE, 2018–2022 (USD MILLION)

TABLE 81 OTHER SOURCES: PLANT-BASED PROTEIN MARKET, BY TYPE, 2023–2028 (USD MILLION)

8.2 CONCENTRATES

8.2.1 APPLICATION OF PROTEIN CONCENTRATES ACROSS FOOD AND NUTRITION SUPPLEMENTS TO DRIVE DEMAND

TABLE 82 CONCENTRATES: PLANT-BASED PROTEIN MARKET, BY SOURCE, 2018–2022 (USD MILLION)

TABLE 83 CONCENTRATES: PLANT-BASED PROTEIN MARKET, BY SOURCE, 2023–2028 (USD MILLION)

8.3 ISOLATES

8.3.1 APPLICATION OF PLANT-PROTEIN ISOLATES IN INFANT FOODS AND THEIR STRONG DEMAND DUE TO THEIR HIGH PROTEIN CONTENT TO DRIVE GROWTH

TABLE 84 ISOLATES: PLANT-BASED PROTEIN MARKET, BY SOURCE, 2018–2022 (USD MILLION)

TABLE 85 ISOLATES: PLANT-BASED PROTEIN MARKET, BY SOURCE, 2023–2028 (USD MILLION)

8.4 TEXTURED

8.4.1 GROWING HEALTH CONCERNS TO DRIVE PREFERENCE FOR PLANT-BASED MEAT, LEADING TO RISING DEMAND FOR TEXTURED PLANT PROTEIN

TABLE 86 TEXTURED: PLANT-BASED PROTEIN MARKET, BY SOURCE, 2018–2022 (USD MILLION)

TABLE 87 TEXTURED: PLANT-BASED PROTEIN MARKET, BY SOURCE, 2023–2028 (USD MILLION)

9 PLANT-BASED PROTEIN MARKET, BY APPLICATION

9.1 INTRODUCTION

FIGURE 36 PLANT-BASED PROTEIN MARKET, BY APPLICATION, 2023 VS. 2028 (USD MILLION)

TABLE 88 PLANT-BASED PROTEIN MARKET, BY APPLICATION, 2018–2022 (USD MILLION)

TABLE 89 PLANT-BASED PROTEIN MARKET, BY APPLICATION, 2023–2028 (USD MILLION)

9.2 FOOD & BEVERAGES

9.2.1 INCREASED CONSUMPTION OF PLANT-BASED MEAT AND DAIRY ALTERNATIVES TO DRIVE GROWTH

TABLE 90 FOOD & BEVERAGES: PLANT-BASED PROTEIN MARKET, BY REGION, 2018–2022 (USD MILLION)

TABLE 91 FOOD & BEVERAGES: PLANT-BASED PROTEIN MARKET, BY REGION, 2023–2028 (USD MILLION)

TABLE 92 FOOD & BEVERAGES: PLANT-BASED PROTEIN MARKET, BY SUBTYPE, 2018–2022 (USD MILLION)

TABLE 93 FOOD & BEVERAGES: PLANT-BASED PROTEIN MARKET, BY SUBTYPE, 2023–2028 (USD MILLION)

9.2.2 MEAT ALTERNATIVES

9.2.3 DAIRY ALTERNATIVES

FIGURE 37 GLOBAL PLANT-BASED MILK SALES: HISTORICAL GROWTH, 2016–2022 (USD MILLION)

9.2.4 BAKERY PRODUCTS

9.2.5 PERFORMANCE NUTRITION

9.2.6 CONVENIENCE FOODS

9.2.7 OTHER FOOD & BEVERAGE APPLICATIONS

9.3 FEED

9.3.1 INCREASED DEMAND FOR CLEAN-LABEL AND SUSTAINABLE FEED PRODUCTS TO DRIVE DEMAND FOR PLANT-BASED PROTEIN

TABLE 94 FEED: PLANT-BASED PROTEIN MARKET, BY REGION, 2018–2022 (USD MILLION)

TABLE 95 FEED: PLANT-BASED PROTEIN MARKET, BY REGION, 2023–2028 (USD MILLION)

10 PLANT-BASED PROTEIN MARKET, BY NATURE

10.1 INTRODUCTION

FIGURE 38 PLANT-BASED PROTEIN MARKET, BY NATURE, 2023 VS. 2028 (USD MILLION)

TABLE 96 PLANT-BASED PROTEIN MARKET, BY NATURE, 2018–2022 (USD MILLION)

TABLE 97 PLANT-BASED PROTEIN MARKET, BY NATURE, 2023–2028 (USD MILLION)

10.2 CONVENTIONAL

10.2.1 GROWING UTILIZATION OF PLANT-BASED FOOD PRODUCTS IN FOOD AND FEED INDUSTRIES TO STIMULATE EXPANSION OF CONVENTIONAL PROTEIN SOURCES

TABLE 98 CONVENTIONAL: PLANT-BASED PROTEIN MARKET, BY REGION, 2018–2022 (USD MILLION)

TABLE 99 CONVENTIONAL: PLANT-BASED PROTEIN MARKET, BY REGION, 2023–2028 (USD MILLION)

10.3 ORGANIC

10.3.1 GROWTH OF ORGANIC PLANT-BASED PROTEIN PRODUCTS TO BE FUELED BY RISING DEMAND FOR CLEAN-LABEL INGREDIENTS

TABLE 100 ORGANIC: PLANT-BASED PROTEIN MARKET, BY REGION, 2018–2022 (USD MILLION)

TABLE 101 ORGANIC: PLANT-BASED PROTEIN MARKET, BY REGION, 2023–2028 (USD MILLION)

11 PLANT-BASED PROTEIN MARKET, BY FORM

11.1 INTRODUCTION

FIGURE 39 PLANT-BASED PROTEIN MARKET, BY FORM, 2023 VS. 2028 (USD MILLION)

TABLE 102 PLANT-BASED PROTEIN MARKET, BY FORM, 2018–2022 (USD MILLION)

TABLE 103 PLANT-BASED PROTEIN MARKET, BY FORM, 2023–2028 (USD MILLION)

11.2 DRY

11.2.1 INCREASING APPLICATIONS OF DRY PROTEIN PRODUCTS IN PLANT-BASED FOOD & BEVERAGE INDUSTRY TO DRIVE MARKET GROWTH

TABLE 104 DRY: PLANT-BASED PROTEIN MARKET, BY REGION, 2018–2022 (USD MILLION)

TABLE 105 DRY: PLANT-BASED PROTEIN MARKET, BY REGION, 2023–2028 (USD MILLION)

11.3 LIQUID

11.3.1 HIGHER PROTEIN ENRICHMENT REQUIREMENTS IN NUTRITIONAL SUPPLEMENTS TO DRIVE GROWTH OF LIQUID PLANT PROTEIN

TABLE 106 LIQUID: PLANT-BASED PROTEIN MARKET, BY REGION, 2018–2022 (USD MILLION)

TABLE 107 LIQUID: PLANT-BASED PROTEIN MARKET, BY REGION, 2023–2028 (USD MILLION)

12 PLANT-BASED PROTEIN MARKET, BY REGION

12.1 INTRODUCTION

FIGURE 40 JAPAN TO RECORD HIGHEST GROWTH DURING FORECAST PERIOD

TABLE 108 PLANT-BASED PROTEIN MARKET, BY REGION, 2018–2022 (USD

MILLION)

TABLE 109 PLANT-BASED PROTEIN MARKET, BY REGION, 2023–2028 (USD MILLION)

TABLE 110 PLANT-BASED PROTEIN MARKET, BY REGION, 2018–2022 (KT)

TABLE 111 PLANT-BASED PROTEIN MARKET, BY REGION, 2023–2028 (KT)

12.2 NORTH AMERICA

FIGURE 41 NORTH AMERICA: REGIONAL SNAPSHOT

12.2.1 NORTH AMERICA: RECESSION IMPACT ANALYSIS

FIGURE 42 NORTH AMERICA: INFLATION RATES, BY COUNTRY, 2017–2022

FIGURE 43 NORTH AMERICA: RECESSION IMPACT ANALYSIS

TABLE 112 NORTH AMERICA: PLANT-BASED PROTEIN MARKET, BY COUNTRY, 2018–2022 (USD MILLION)

TABLE 113 NORTH AMERICA: PLANT-BASED PROTEIN MARKET, BY COUNTRY, 2023–2028 (USD MILLION)

TABLE 114 NORTH AMERICA: PLANT-BASED PROTEIN MARKET, BY SOURCE, 2018–2022 (USD MILLION)

TABLE 115 NORTH AMERICA: PLANT-BASED PROTEIN MARKET, BY SOURCE, 2023–2028 (USD MILLION)

TABLE 116 NORTH AMERICA: PLANT-BASED PROTEIN MARKET, BY SOURCE, 2018–2022 (KT)

TABLE 117 NORTH AMERICA: PLANT-BASED PROTEIN MARKET, BY SOURCE, 2023–2028 (KT)

TABLE 118 NORTH AMERICA: PLANT-BASED PROTEIN MARKET FOR PEA, BY SUBTYPE, 2018–2022 (USD MILLION)

TABLE 119 NORTH AMERICA: PLANT-BASED PROTEIN MARKET FOR PEA, BY SUBTYPE, 2023–2028 (USD MILLION)

TABLE 120 NORTH AMERICA: PLANT-BASED PROTEIN MARKET FOR FERMENTED PROTEIN, BY SUBTYPE, 2018–2022 (USD MILLION)

TABLE 121 NORTH AMERICA: PLANT-BASED PROTEIN MARKET FOR FERMENTED PROTEIN, BY SUBTYPE, 2023–2028 (USD MILLION)

TABLE 122 NORTH AMERICA: PLANT-BASED PROTEIN MARKET, BY FORM, 2018–2022 (USD MILLION)

TABLE 123 NORTH AMERICA: PLANT-BASED PROTEIN MARKET, BY FORM, 2023–2028 (USD MILLION)

TABLE 124 NORTH AMERICA: PLANT-BASED PROTEIN MARKET, BY APPLICATION, 2018–2022 (USD MILLION)

TABLE 125 NORTH AMERICA: PLANT-BASED PROTEIN MARKET, BY APPLICATION, 2023–2028 (USD MILLION)

TABLE 126 NORTH AMERICA: PLANT-BASED PROTEIN MARKET, BY NATURE,

2018–2022 (USD MILLION)

TABLE 127 NORTH AMERICA: PLANT-BASED PROTEIN MARKET, BY NATURE, 2023–2028 (USD MILLION)

12.2.2 US

12.2.2.1 Rise in awareness regarding environmental and personal health benefits to drive preference for plant-based ingredients

TABLE 128 US: PLANT-BASED PROTEIN MARKET, BY SOURCE, 2018–2022 (USD MILLION)

TABLE 129 US: PLANT-BASED PROTEIN MARKET, BY SOURCE, 2023–2028 (USD MILLION)

TABLE 130 US: PLANT-BASED PROTEIN MARKET FOR FERMENTED PROTEIN, BY SUBTYPE, 2018–2022 (USD MILLION)

TABLE 131 US: PLANT-BASED PROTEIN MARKET FOR FERMENTED PROTEIN, BY SUBTYPE, 2023–2028 (USD MILLION)

12.2.3 CANADA

12.2.3.1 Capitalization on large-scale shift toward flexitarian diets by prominent players to drive production

TABLE 132 CANADA: PLANT-BASED PROTEIN MARKET, BY SOURCE, 2018–2022 (USD MILLION)

TABLE 133 CANADA: PLANT-BASED PROTEIN MARKET, BY SOURCE, 2023–2028 (USD MILLION)

TABLE 134 CANADA: PLANT-BASED PROTEIN MARKET FOR FERMENTED PROTEIN, BY SUBTYPE, 2018–2022 (USD MILLION)

TABLE 135 CANADA: PLANT-BASED PROTEIN MARKET FOR FERMENTED PROTEIN, BY SUBTYPE, 2023–2028 (USD MILLION)

12.2.4 MEXICO

12.2.4.1 Evolving consumer preferences and increasing demand for nutritious pet foods to stimulate market growth

TABLE 136 MEXICO: PLANT-BASED PROTEIN MARKET, BY SOURCE, 2018–2022 (USD MILLION)

TABLE 137 MEXICO: PLANT-BASED PROTEIN MARKET, BY SOURCE, 2023–2028 (USD MILLION)

TABLE 138 MEXICO: PLANT-BASED PROTEIN MARKET FOR FERMENTED PROTEIN, BY SUBTYPE, 2018–2022 (USD MILLION)

TABLE 139 MEXICO: PLANT-BASED PROTEIN MARKET FOR FERMENTED PROTEIN, BY SUBTYPE, 2023–2028 (USD MILLION)

12.3 EUROPE

12.3.1 EUROPE: RECESSION IMPACT ANALYSIS

FIGURE 44 EUROPE: INFLATION RATES, BY KEY COUNTRY, 2017–2022

FIGURE 45 EUROPE: RECESSION IMPACT ANALYSIS**TABLE 140 EUROPE: PLANT-BASED PROTEIN MARKET, BY COUNTRY, 2018–2022 (USD MILLION)****TABLE 141 EUROPE: PLANT-BASED PROTEIN MARKET, BY COUNTRY, 2023–2028 (USD MILLION)****TABLE 142 EUROPE: PLANT-BASED PROTEIN MARKET, BY SOURCE, 2018–2022 (USD MILLION)****TABLE 143 EUROPE: PLANT-BASED PROTEIN MARKET, BY SOURCE, 2023–2028 (USD MILLION)****TABLE 144 EUROPE: PLANT-BASED PROTEIN MARKET, BY SOURCE, 2018–2022 (KT)****TABLE 145 EUROPE: PLANT-BASED PROTEIN MARKET, BY SOURCE, 2023–2028 (KT)****TABLE 146 EUROPE: PLANT-BASED PROTEIN MARKET FOR PEA, BY SUBTYPE, 2018–2022 (USD MILLION)****TABLE 147 EUROPE: PLANT-BASED PROTEIN MARKET FOR PEA, BY SUBTYPE, 2023–2028 (USD MILLION)****TABLE 148 EUROPE: PLANT-BASED PROTEIN MARKET FOR FERMENTED PROTEIN, BY SUBTYPE, 2018–2022 (USD MILLION)****TABLE 149 EUROPE: PLANT-BASED PROTEIN MARKET FOR FERMENTED PROTEIN, 2023–2028 (USD MILLION)****TABLE 150 EUROPE: PLANT-BASED PROTEIN MARKET, BY APPLICATION, 2018–2022 (USD MILLION)****TABLE 151 EUROPE: PLANT-BASED PROTEIN MARKET, BY APPLICATION, 2023–2028 (USD MILLION)****TABLE 152 EUROPE: PLANT-BASED PROTEIN MARKET, BY FORM, 2018–2022 (USD MILLION)****TABLE 153 EUROPE: PLANT-BASED PROTEIN MARKET, BY FORM, 2023–2028 (USD MILLION)****TABLE 154 EUROPE: PLANT-BASED PROTEIN MARKET, BY NATURE, 2018–2022 (USD MILLION)****TABLE 155 EUROPE: PLANT-BASED PROTEIN MARKET, BY NATURE, 2023–2028 (USD MILLION)****12.3.2 UK****12.3.2.1 Increasing vegan population to drive plant-based protein market****TABLE 156 UK: PLANT-BASED PROTEIN MARKET, BY SOURCE, 2018–2022 (USD MILLION)****TABLE 157 UK: PLANT-BASED PROTEIN MARKET, BY SOURCE, 2023–2028 (USD MILLION)**

TABLE 158 UK: PLANT-BASED PROTEIN MARKET FOR FERMENTED PROTEIN, BY SUBTYPE, 2018–2022 (USD MILLION)

TABLE 159 UK: PLANT-BASED PROTEIN MARKET FOR FERMENTED PROTEIN, BY SUBTYPE, 2023–2028 (USD MILLION)

12.3.3 GERMANY

12.3.3.1 Increasing dependence on plant-based foods and high adoption rate of flexitarian diets to boost growth of plant-based protein

TABLE 160 GERMANY: PLANT-BASED PROTEIN MARKET, BY SOURCE, 2018–2022 (USD MILLION)

TABLE 161 GERMANY: PLANT-BASED PROTEIN MARKET, BY SOURCE, 2023–2028 (USD MILLION)

TABLE 162 GERMANY: PLANT-BASED PROTEIN MARKET FOR FERMENTED PROTEIN, BY SUBTYPE, 2018–2022 (USD MILLION)

TABLE 163 GERMANY: PLANT-BASED PROTEIN MARKET FOR FERMENTED PROTEIN, BY SUBTYPE, 2023–2028 (USD MILLION)

12.3.4 ITALY

12.3.4.1 Rapidly changing consumer preferences from conventional to plant-based protein to drive market

TABLE 164 ITALY: PLANT-BASED PROTEIN MARKET, BY SOURCE, 2018–2022 (USD MILLION)

TABLE 165 ITALY: PLANT-BASED PROTEIN MARKET, BY SOURCE, 2023–2028 (USD MILLION)

TABLE 166 ITALY: PLANT-BASED PROTEIN MARKET FOR FERMENTED PROTEIN, BY SUBTYPE, 2018–2022 (USD MILLION)

TABLE 167 ITALY: PLANT-BASED PROTEIN MARKET FOR FERMENTED PROTEIN, BY SUBTYPE, 2023–2028 (USD MILLION)

12.3.5 FRANCE

12.3.5.1 Government support to develop domestic plant-based protein production and reduce imports to drive growth

TABLE 168 FRANCE: PLANT-BASED PROTEIN MARKET, BY SOURCE, 2018–2022 (USD MILLION)

TABLE 169 FRANCE: PLANT-BASED PROTEIN MARKET, BY SOURCE, 2023–2028 (USD MILLION)

TABLE 170 FRANCE: PLANT-BASED PROTEIN MARKET FOR FERMENTED PROTEIN, BY SUBTYPE, 2018–2022 (USD MILLION)

TABLE 171 FRANCE: PLANT-BASED PROTEIN MARKET FOR FERMENTED PROTEIN, BY SUBTYPE, 2023–2028 (USD MILLION)

12.3.6 NETHERLANDS

12.3.6.1 Increasing popularity of plant-based foods due to their health and

environmental benefits to drive demand for plant protein

TABLE 172 NETHERLANDS: PLANT-BASED PROTEIN MARKET, BY SOURCE, 2018–2022 (USD MILLION)

TABLE 173 NETHERLANDS: PLANT-BASED PROTEIN MARKET, BY SOURCE, 2023–2028 (USD MILLION)

TABLE 174 NETHERLANDS: PLANT-BASED PROTEIN MARKET FOR FERMENTED PROTEIN, BY SUBTYPE, 2018–2022 (USD MILLION)

TABLE 175 NETHERLANDS: PLANT-BASED PROTEIN MARKET FOR FERMENTED PROTEIN, BY SUBTYPE, 2023–2028 (USD MILLION)

12.3.7 SPAIN

12.3.7.1 Product innovation and increased consumption of plant-based convenience foods to drive market

TABLE 176 SPAIN: PLANT-BASED PROTEIN MARKET, BY SOURCE, 2018–2022 (USD MILLION)

TABLE 177 SPAIN: PLANT-BASED PROTEIN MARKET, BY SOURCE, 2023–2028 (USD MILLION)

TABLE 178 SPAIN: PLANT-BASED PROTEIN MARKET FOR FERMENTED PROTEIN, BY SUBTYPE, 2018–2022 (USD MILLION)

TABLE 179 SPAIN: PLANT-BASED PROTEIN MARKET FOR FERMENTED PROTEIN, BY SUBTYPE, 2023–2028 (USD MILLION)

12.3.8 TURKEY

12.3.8.1 Health advantages linked to plant-centered diets to bolster demand for plant-based protein

TABLE 180 TURKEY: PLANT-BASED PROTEIN MARKET, BY SOURCE, 2018–2022 (USD MILLION)

TABLE 181 TURKEY: PLANT-BASED PROTEIN MARKET, BY SOURCE, 2023–2028 (USD MILLION)

TABLE 182 TURKEY: PLANT-BASED PROTEIN MARKET FOR FERMENTED PROTEIN, BY SUBTYPE, 2018–2022 (USD MILLION)

TABLE 183 TURKEY: PLANT-BASED PROTEIN MARKET FOR FERMENTED PROTEIN, BY SUBTYPE, 2023–2028 (USD MILLION)

12.3.9 POLAND

12.3.9.1 Evolving consumer preferences and health awareness to spur market growth

TABLE 184 POLAND: PLANT-BASED PROTEIN MARKET, BY SOURCE, 2018–2022 (USD MILLION)

TABLE 185 POLAND: PLANT-BASED PROTEIN MARKET, BY SOURCE, 2023–2028 (USD MILLION)

TABLE 186 POLAND: PLANT-BASED PROTEIN MARKET FOR FERMENTED

PROTEIN, BY SUBTYPE, 2018–2022 (USD MILLION)

TABLE 187 POLAND: PLANT-BASED PROTEIN MARKET FOR FERMENTED PROTEIN, BY SUBTYPE, 2023–2028 (USD MILLION)

12.3.10 REST OF EUROPE

TABLE 188 REST OF EUROPE: PLANT-BASED PROTEIN MARKET, BY SOURCE, 2018–2022 (USD MILLION)

TABLE 189 REST OF EUROPE: PLANT-BASED PROTEIN MARKET, BY SOURCE, 2023–2028 (USD MILLION)

TABLE 190 REST OF EUROPE: PLANT-BASED PROTEIN MARKET FOR FERMENTED PROTEIN, BY SUBTYPE, 2018–2022 (USD MILLION)

TABLE 191 REST OF EUROPE: PLANT-BASED PROTEIN MARKET FOR FERMENTED PROTEIN, BY SUBTYPE, 2023–2028 (USD MILLION) 218 "12.4 ASIA PACIFIC

FIGURE 46 ASIA PACIFIC: MARKET SNAPSHOT

12.4.1 ASIA PACIFIC: RECESSION IMPACT ANALYSIS

FIGURE 47 ASIA PACIFIC: INFLATION RATES, BY KEY COUNTRY, 2017–2022

FIGURE 48 ASIA PACIFIC: RECESSION IMPACT ANALYSIS

TABLE 192 ASIA PACIFIC: PLANT-BASED PROTEIN MARKET, BY COUNTRY, 2018–2022 (USD MILLION)

TABLE 193 ASIA PACIFIC: PLANT-BASED PROTEIN MARKET, BY COUNTRY, 2023–2028 (USD MILLION)

TABLE 194 ASIA PACIFIC: PLANT-BASED PROTEIN MARKET, BY SOURCE, 2018–2022 (USD MILLION)

TABLE 195 ASIA PACIFIC: PLANT-BASED PROTEIN MARKET, BY SOURCE, 2023–2028 (USD MILLION)

TABLE 196 ASIA PACIFIC: PLANT-BASED PROTEIN MARKET, BY SOURCE, 2018–2022 (KT)

TABLE 197 ASIA PACIFIC: PLANT-BASED PROTEIN MARKET, BY SOURCE, 2023–2028 (KT)

TABLE 198 ASIA PACIFIC: PLANT-BASED PROTEIN MARKET FOR PEA, BY SUBTYPE, 2018–2022 (USD MILLION)

TABLE 199 ASIA PACIFIC: PLANT-BASED PROTEIN MARKET FOR PEA, BY SUBTYPE, 2023–2028 (USD MILLION)

TABLE 200 ASIA PACIFIC: PLANT-BASED PROTEIN MARKET FOR FERMENTED PROTEIN, BY SUBTYPE, 2018–2022 (USD MILLION)

TABLE 201 ASIA PACIFIC: PLANT-BASED PROTEIN MARKET FOR FERMENTED PROTEIN, BY SUBTYPE, 2023–2028 (USD MILLION)

TABLE 202 ASIA PACIFIC: PLANT-BASED PROTEIN MARKET, BY FORM, 2018–2022 (USD MILLION)

TABLE 203 ASIA PACIFIC: PLANT-BASED PROTEIN MARKET, BY FORM,

2023–2028 (USD MILLION)

TABLE 204 ASIA PACIFIC: PLANT-BASED PROTEIN MARKET, BY APPLICATION, 2018–2022 (USD MILLION)

TABLE 205 ASIA PACIFIC: PLANT-BASED PROTEIN MARKET, BY APPLICATION, 2023–2028 (USD MILLION)

TABLE 206 ASIA PACIFIC: PLANT-BASED PROTEIN MARKET, BY NATURE, 2018–2022 (USD MILLION)

TABLE 207 ASIA PACIFIC: PLANT-BASED PROTEIN MARKET, BY NATURE, 2023–2028 (USD MILLION)

12.4.2 CHINA

12.4.2.1 Demand for products with health benefits to drive market growth

TABLE 208 CHINA: PLANT-BASED PROTEIN MARKET, BY SOURCE, 2018–2022 (USD MILLION)

TABLE 209 CHINA: PLANT-BASED PROTEIN MARKET, BY SOURCE, 2023–2028 (USD MILLION)

TABLE 210 CHINA: PLANT-BASED PROTEIN MARKET FOR FERMENTED PROTEIN, BY SUBTYPE, 2018–2022 (USD MILLION)

TABLE 211 CHINA: PLANT-BASED PROTEIN MARKET FOR FERMENTED PROTEIN, 2023–2028 (USD MILLION)

12.4.3 JAPAN

12.4.3.1 Ageing population and rising consumption of plant-based convenience foods to drive market growth

TABLE 212 JAPAN: PLANT-BASED PROTEIN MARKET, BY SOURCE, 2018–2022 (USD MILLION)

TABLE 213 JAPAN: PLANT-BASED PROTEIN MARKET, BY SOURCE, 2023–2028 (USD MILLION)

TABLE 214 JAPAN: PLANT-BASED PROTEIN MARKET FOR FERMENTED PROTEIN, BY SUBTYPE, 2018–2022 (USD MILLION)

TABLE 215 JAPAN: PLANT-BASED PROTEIN MARKET FOR FERMENTED PROTEIN, BY SUBTYPE, 2023–2028 (USD MILLION)

12.4.4 AUSTRALIA & NEW ZEALAND

12.4.4.1 Investments from key players and rising vegan population to drive growth of plant-based protein

TABLE 216 AUSTRALIA & NEW ZEALAND: PLANT-BASED PROTEIN MARKET, BY SOURCE, 2018–2022 (USD MILLION)

TABLE 217 AUSTRALIA & NEW ZEALAND: PLANT-BASED PROTEIN MARKET, BY SOURCE, 2023–2028 (USD MILLION)

TABLE 218 AUSTRALIA & NEW ZEALAND: PLANT-BASED PROTEIN MARKET FOR FERMENTED PROTEIN, BY SUBTYPE, 2018–2022 (USD MILLION)

TABLE 219 AUSTRALIA & NEW ZEALAND: PLANT-BASED PROTEIN MARKET FOR FERMENTED PROTEIN, BY SUBTYPE, 2023–2028 (USD MILLION)

12.4.5 INDIA

12.4.5.1 Evolving dietary preferences and increasing coronary heart diseases to drive demand for plant-based protein

TABLE 220 INDIA: PLANT-BASED PROTEIN MARKET, BY SOURCE, 2018–2022 (USD MILLION)

TABLE 221 INDIA: PLANT-BASED PROTEIN MARKET, BY SOURCE, 2023–2028 (USD MILLION)

TABLE 222 INDIA: PLANT-BASED PROTEIN MARKET FOR FERMENTED PROTEIN, BY SUBTYPE, 2018–2022 (USD MILLION)

TABLE 223 INDIA: PLANT-BASED PROTEIN MARKET FOR FERMENTED PROTEIN, BY SUBTYPE, 2023–2028 (USD MILLION)

12.4.6 SOUTH KOREA

12.4.6.1 Significant shift toward alternative proteins and rising food safety concerns to spur growth

TABLE 224 SOUTH KOREA: PLANT-BASED PROTEIN MARKET, BY SOURCE, 2018–2022 (USD MILLION)

TABLE 225 SOUTH KOREA: PLANT-BASED PROTEIN MARKET, BY SOURCE, 2023–2028 (USD MILLION)

TABLE 226 SOUTH KOREA: PLANT-BASED PROTEIN MARKET FOR FERMENTED PROTEIN, BY SUBTYPE, 2018–2022 (USD MILLION)

TABLE 227 SOUTH KOREA: PLANT-BASED PROTEIN MARKET FOR FERMENTED PROTEIN, BY SUBTYPE, 2023–2028 (USD MILLION)

12.4.7 INDONESIA

12.4.7.1 Growing demand for soy protein in food products and animal feed to boost market expansion

TABLE 228 INDONESIA: PLANT-BASED PROTEIN MARKET, BY SOURCE, 2018–2022 (USD MILLION)

TABLE 229 INDONESIA: PLANT-BASED PROTEIN MARKET, BY SOURCE, 2023–2028 (USD MILLION)

TABLE 230 INDONESIA: PLANT-BASED PROTEIN MARKET FOR FERMENTED PROTEIN, BY SUBTYPE, 2018–2022 (USD MILLION)

TABLE 231 INDONESIA: PLANT-BASED PROTEIN MARKET FOR FERMENTED PROTEIN, BY SUBTYPE, 2023–2028 (USD MILLION)

12.4.8 MALAYSIA

12.4.8.1 Influence of Buddhism and Hinduism to contribute to popularity of vegetarianism

TABLE 232 MALAYSIA: PLANT-BASED PROTEIN MARKET, BY SOURCE,

2018–2022 (USD MILLION)

TABLE 233 MALAYSIA: PLANT-BASED PROTEIN MARKET, BY SOURCE,
2023–2028 (USD MILLION)

TABLE 234 MALAYSIA: PLANT-BASED PROTEIN MARKET FOR FERMENTED
PROTEIN, BY SUBTYPE, 2018–2022 (USD MILLION)

TABLE 235 MALAYSIA: PLANT-BASED PROTEIN MARKET FOR FERMENTED
PROTEIN, BY SUBTYPE, 2023–2028 (USD MILLION)

12.4.9 PHILIPPINES

12.4.9.1 Surge in health and wellness trends to persuade people to prefer protein-based food products

TABLE 236 PHILIPPINES: PLANT-BASED PROTEIN MARKET, BY SOURCE,
2018–2022 (USD MILLION)

TABLE 237 PHILIPPINES: PLANT-BASED PROTEIN MARKET, BY SOURCE,
2023–2028 (USD MILLION)

TABLE 238 PHILIPPINES: PLANT-BASED PROTEIN MARKET FOR FERMENTED
PROTEIN, BY SUBTYPE, 2018–2022 (USD MILLION)

TABLE 239 PHILIPPINES: PLANT-BASED PROTEIN MARKET FOR FERMENTED
PROTEIN, BY SUBTYPE, 2023–2028 (USD MILLION)

12.4.10 VIETNAM

12.4.10.1 Environmental issues and concerns related to carbon footprint of animal agriculture to drive growth

TABLE 240 VIETNAM: PLANT-BASED PROTEIN MARKET, BY SOURCE, 2018–2022
(USD MILLION)

TABLE 241 VIETNAM: PLANT-BASED PROTEIN MARKET, BY SOURCE, 2023–2028
(USD MILLION)

TABLE 242 VIETNAM: PLANT-BASED PROTEIN MARKET FOR FERMENTED
PROTEIN, BY SUBTYPE, 2018–2022 (USD MILLION)

TABLE 243 VIETNAM: PLANT-BASED PROTEIN MARKET FOR FERMENTED
PROTEIN, BY SUBTYPE, 2023–2028 (USD MILLION)

12.4.11 THAILAND

12.4.11.1 Rising awareness regarding environmental impact of meat industry to encourage market growth

TABLE 244 THAILAND: PLANT-BASED PROTEIN MARKET, BY SOURCE, 2018–2022
(USD MILLION)

TABLE 245 THAILAND: PLANT-BASED PROTEIN MARKET, BY SOURCE, 2023–2028
(USD MILLION)

TABLE 246 THAILAND: PLANT-BASED PROTEIN MARKET FOR FERMENTED
PROTEIN, BY SUBTYPE, 2018–2022 (USD MILLION)

TABLE 247 THAILAND: PLANT-BASED PROTEIN MARKET FOR FERMENTED

PROTEIN, BY SUBTYPE, 2023–2028 (USD MILLION)**12.4.12 REST OF ASIA PACIFIC****TABLE 248 REST OF ASIA PACIFIC: PLANT-BASED PROTEIN MARKET, BY SOURCE, 2018–2022 (USD MILLION)****TABLE 249 REST OF ASIA PACIFIC: PLANT-BASED PROTEIN MARKET, BY SOURCE, 2023–2028 (USD MILLION)****TABLE 250 REST OF ASIA PACIFIC: PLANT-BASED PROTEIN MARKET FOR FERMENTED PROTEIN, BY SUBTYPE, 2018–2022 (USD MILLION)****TABLE 251 REST OF ASIA PACIFIC: PLANT-BASED PROTEIN MARKET FOR FERMENTED PROTEIN, BY SUBTYPE, 2023–2028 (USD MILLION)****12.5 SOUTH AMERICA****12.5.1 SOUTH AMERICA: RECESSION IMPACT ANALYSIS****FIGURE 49 SOUTH AMERICA: INFLATION RATES, BY KEY COUNTRY, 2017–2022****FIGURE 50 SOUTH AMERICA: RECESSION IMPACT ANALYSIS****TABLE 252 SOUTH AMERICA: PLANT-BASED PROTEIN MARKET, BY COUNTRY, 2018–2022 (USD MILLION)****TABLE 253 SOUTH AMERICA: PLANT-BASED PROTEIN MARKET, BY COUNTRY, 2023–2028 (USD MILLION)****TABLE 254 SOUTH AMERICA: PLANT-BASED PROTEIN MARKET, BY SOURCE, 2018–2022 (USD MILLION)****TABLE 255 SOUTH AMERICA: PLANT-BASED PROTEIN MARKET, BY SOURCE, 2023–2028 (USD MILLION)****TABLE 256 SOUTH AMERICA: PLANT-BASED PROTEIN MARKET FOR PEA, BY SUBTYPE, 2018–2022 (USD MILLION)****TABLE 257 SOUTH AMERICA: PLANT-BASED PROTEIN MARKET FOR PEA, BY SUBTYPE, 2023–2028 (USD MILLION)****TABLE 258 SOUTH AMERICA: PLANT-BASED PROTEIN MARKET FOR FERMENTED PROTEIN, BY SUBTYPE, 2018–2022 (USD MILLION)****TABLE 259 SOUTH AMERICA: PLANT-BASED PROTEIN MARKET FOR FERMENTED PROTEIN, BY SUBTYPE, 2023–2028 (USD MILLION)****TABLE 260 SOUTH AMERICA: PLANT-BASED PROTEIN MARKET, BY SOURCE, 2018–2022 (KT)****TABLE 261 SOUTH AMERICA: PLANT-BASED PROTEIN MARKET, BY SOURCE, 2023–2028 (KT)****TABLE 262 SOUTH AMERICA: PLANT-BASED PROTEIN MARKET, BY APPLICATION, 2018–2022 (USD MILLION)****TABLE 263 SOUTH AMERICA: PLANT-BASED PROTEIN MARKET, BY APPLICATION, 2023–2028 (USD MILLION)****TABLE 264 SOUTH AMERICA: PLANT-BASED PROTEIN MARKET, BY FORM,**

2018–2022 (USD MILLION)

TABLE 265 SOUTH AMERICA: PLANT-BASED PROTEIN MARKET, BY FORM,
2023–2028 (USD MILLION)

TABLE 266 SOUTH AMERICA: PLANT-BASED PROTEIN MARKET, BY NATURE,
2018–2022 (USD MILLION)

TABLE 267 SOUTH AMERICA: PLANT-BASED PROTEIN MARKET, BY NATURE,
2023–2028 (USD MILLION)

12.5.2 BRAZIL

12.5.2.1 High processing and export capabilities coupled with increased adoption of plant-based foods to drive growth

TABLE 268 BRAZIL: PLANT-BASED PROTEIN MARKET, BY SOURCE, 2018–2022
(USD MILLION)

TABLE 269 BRAZIL: PLANT-BASED PROTEIN MARKET, BY SOURCE, 2023–2028
(USD MILLION)

TABLE 270 BRAZIL: PLANT-BASED PROTEIN MARKET FOR FERMENTED
PROTEIN, BY SUBTYPE, 2018–2022 (USD MILLION)

TABLE 271 BRAZIL: PLANT-BASED PROTEIN MARKET FOR FERMENTED
PROTEIN, BY SUBTYPE, 2023–2028 (USD MILLION)

12.5.3 ARGENTINA

12.5.3.1 Environmental, nutritional, and animal welfare concerns among youth to drive demand for plant-based protein

TABLE 272 ARGENTINA: PLANT-BASED PROTEIN MARKET, BY SOURCE,
2018–2022 (USD MILLION)

TABLE 273 ARGENTINA: PLANT-BASED PROTEIN MARKET, BY SOURCE,
2023–2028 (USD MILLION)

TABLE 274 ARGENTINA: PLANT-BASED PROTEIN MARKET FOR FERMENTED
PROTEIN, BY SUBTYPE, 2018–2022 (USD MILLION)

TABLE 275 ARGENTINA: PLANT-BASED PROTEIN MARKET FOR FERMENTED
PROTEIN, BY SUBTYPE, 2023–2028 (USD MILLION)

12.5.4 COLUMBIA

12.5.4.1 Rapid surge in vegan population to encourage popularity of plant-based protein

TABLE 276 COLUMBIA: PLANT-BASED PROTEIN MARKET, BY SOURCE,
2018–2022 (USD MILLION)

TABLE 277 COLUMBIA: PLANT-BASED PROTEIN MARKET, BY SOURCE,
2023–2028 (USD MILLION)

TABLE 278 COLUMBIA: PLANT-BASED PROTEIN MARKET FOR FERMENTED
PROTEIN, BY SUBTYPE, 2018–2022 (USD MILLION)

TABLE 279 COLUMBIA: PLANT-BASED PROTEIN MARKET FOR FERMENTED

PROTEIN, BY SUBTYPE, 2023–2028 (USD MILLION)

12.5.5 PERU

12.5.5.1 Environmental considerations, nutritional awareness, and concerns about animal welfare to spur market

TABLE 280 PERU: PLANT-BASED PROTEIN MARKET, BY SOURCE, 2018–2022 (USD MILLION)

TABLE 281 PERU: PLANT-BASED PROTEIN MARKET, BY SOURCE, 2023–2028 (USD MILLION)

TABLE 282 PERU: PLANT-BASED PROTEIN MARKET FOR FERMENTED PROTEIN, BY SUBTYPE, 2018–2022 (USD MILLION)

TABLE 283 PERU: PLANT-BASED PROTEIN MARKET FOR FERMENTED PROTEIN, BY SUBTYPE, 2023–2028 (USD MILLION)

12.5.6 CHILE

12.5.6.1 Focus on promoting a vegan-friendly lifestyle to boost growth

TABLE 284 CHILE: PLANT-BASED PROTEIN MARKET, BY SOURCE, 2018–2022 (USD MILLION)

TABLE 285 CHILE: PLANT-BASED PROTEIN MARKET, BY SOURCE, 2023–2028 (USD MILLION)

TABLE 286 CHILE: PLANT-BASED PROTEIN MARKET FOR FERMENTED PROTEIN, BY SUBTYPE, 2018–2022 (USD MILLION)

TABLE 287 CHILE: PLANT-BASED PROTEIN MARKET FOR FERMENTED PROTEIN, BY SUBTYPE, 2023–2028 (USD MILLION)

12.5.7 REST OF SOUTH AMERICA

TABLE 288 REST OF SOUTH AMERICA: PLANT-BASED PROTEIN MARKET, BY SOURCE, 2018–2022 (USD MILLION)

TABLE 289 REST OF SOUTH AMERICA: PLANT-BASED PROTEIN MARKET, BY SOURCE, 2023–2028 (USD MILLION)

TABLE 290 REST OF SOUTH AMERICA: PLANT-BASED PROTEIN MARKET FOR FERMENTED PROTEIN, BY SUBTYPE, 2018–2022 (USD MILLION)

TABLE 291 REST OF SOUTH AMERICA: PLANT-BASED PROTEIN MARKET FOR FERMENTED PROTEIN, BY SUBTYPE, 2023–2028 (USD MILLION)

12.6 REST OF THE WORLD (ROW)

12.6.1 ROW: RECESSION IMPACT ANALYSIS

FIGURE 51 ROW: RECESSION IMPACT ANALYSIS

TABLE 292 ROW: PLANT-BASED PROTEIN MARKET, BY REGION, 2018–2022 (USD MILLION)

TABLE 293 ROW: PLANT-BASED PROTEIN MARKET, BY REGION, 2023–2028 (USD MILLION)

TABLE 294 ROW: PLANT-BASED PROTEIN MARKET, BY SOURCE, 2018–2022

(USD MILLION)

TABLE 295 ROW: PLANT-BASED PROTEIN MARKET, BY SOURCE, 2023–2028

(USD MILLION)

TABLE 296 ROW: PLANT-BASED PROTEIN MARKET, BY SOURCE, 2018–2022 (KT)

TABLE 297 ROW: PLANT-BASED PROTEIN MARKET, BY SOURCE, 2023–2028 (KT)

TABLE 298 ROW: PLANT-BASED PROTEIN MARKET FOR PEA, BY SUBTYPE, 2018–2022 (USD MILLION)

TABLE 299 ROW: PLANT-BASED PROTEIN MARKET FOR PEA, BY SUBTYPE, 2023–2028 (USD MILLION)

TABLE 300 ROW: PLANT-BASED PROTEIN MARKET FOR FERMENTED PROTEIN, BY SUBTYPE, 2018–2022 (USD MILLION)

TABLE 301 ROW: PLANT-BASED PROTEIN MARKET FOR FERMENTED PROTEIN, BY SUBTYPE, 2023–2028 (USD MILLION)

TABLE 302 ROW: PLANT-BASED PROTEIN MARKET, BY APPLICATION, 2018–2022 (USD MILLION)

TABLE 303 ROW: PLANT-BASED PROTEIN MARKET, BY APPLICATION, 2023–2028 (USD MILLION)

TABLE 304 ROW: PLANT-BASED PROTEIN MARKET, BY FORM, 2018–2022 (USD MILLION)

TABLE 305 ROW: PLANT-BASED PROTEIN MARKET, BY FORM, 2023–2028 (USD MILLION)

TABLE 306 ROW: PLANT-BASED PROTEIN MARKET, BY NATURE, 2018–2022 (USD MILLION)

TABLE 307 ROW: PLANT-BASED PROTEIN MARKET, BY NATURE, 2023–2028 (USD MILLION)

12.6.2 AFRICA

12.6.2.1 Favorable processing conditions coupled with rising consumer awareness about health issues to boost market growth

TABLE 308 AFRICA: PLANT-BASED PROTEIN MARKET, BY COUNTRY, 2018–2022 (USD MILLION)

TABLE 309 AFRICA: PLANT-BASED PROTEIN MARKET, BY COUNTRY, 2023–2028 (USD MILLION)

TABLE 310 AFRICA: PLANT-BASED PROTEIN MARKET, BY SOURCE, 2018–2022 (USD MILLION)

TABLE 311 AFRICA: PLANT-BASED PROTEIN MARKET, BY SOURCE, 2023–2028 (USD MILLION)

TABLE 312 AFRICA: PLANT-BASED PROTEIN MARKET FOR FERMENTED PROTEIN, BY SUBTYPE, 2018–2022 (USD MILLION)

TABLE 313 AFRICA: PLANT-BASED PROTEIN MARKET FOR FERMENTED

PROTEIN, BY SUBTYPE, 2023–2028 (USD MILLION)**12.6.2.2 South Africa****TABLE 314 SOUTH AFRICA: PLANT-BASED PROTEIN MARKET, BY SOURCE, 2018–2022 (USD MILLION)****TABLE 315 SOUTH AFRICA: PLANT-BASED PROTEIN MARKET, BY SOURCE, 2023–2028 (USD MILLION)****TABLE 316 SOUTH AFRICA: PLANT-BASED PROTEIN MARKET FOR FERMENTED PROTEIN, BY SUBTYPE, 2018–2022 (USD MILLION)****TABLE 317 SOUTH AFRICA: PLANT-BASED PROTEIN MARKET FOR FERMENTED PROTEIN, BY SUBTYPE, 2023–2028 (USD MILLION)****12.6.2.3 Morocco****TABLE 318 MOROCCO: PLANT-BASED PROTEIN MARKET, BY SOURCE, 2018–2022 (USD MILLION)****TABLE 319 MOROCCO: PLANT-BASED PROTEIN MARKET, BY SOURCE, 2023–2028 (USD MILLION)****TABLE 320 MOROCCO: PLANT-BASED PROTEIN MARKET FOR FERMENTED PROTEIN, BY SUBTYPE, 2018–2022 (USD MILLION)****TABLE 321 MOROCCO: PLANT-BASED PROTEIN MARKET FOR FERMENTED PROTEIN, BY SUBTYPE, 2023–2028 (USD MILLION)****12.6.2.4 Algeria****TABLE 322 ALGERIA: PLANT-BASED PROTEIN MARKET, BY SOURCE, 2018–2022 (USD MILLION)****TABLE 323 ALGERIA: PLANT-BASED PROTEIN MARKET, BY SOURCE, 2023–2028 (USD MILLION)****TABLE 324 ALGERIA: PLANT-BASED PROTEIN MARKET FOR FERMENTED PROTEIN, BY SUBTYPE, 2018–2022 (USD MILLION)****TABLE 325 ALGERIA: PLANT-BASED PROTEIN MARKET FOR FERMENTED PROTEIN, BY SUBTYPE, 2023–2028 (USD MILLION)****12.6.2.5 Kenya****TABLE 326 KENYA: PLANT-BASED PROTEIN MARKET, BY SOURCE, 2018–2022 (USD MILLION)****TABLE 327 KENYA: PLANT-BASED PROTEIN MARKET, BY SOURCE, 2023–2028 (USD MILLION)****TABLE 328 KENYA: PLANT-BASED PROTEIN MARKET FOR FERMENTED PROTEIN, BY SUBTYPE, 2018–2022 (USD MILLION)****TABLE 329 KENYA: PLANT-BASED PROTEIN MARKET FOR FERMENTED PROTEIN, BY SUBTYPE, 2023–2028 (USD MILLION)****12.6.2.6 Rest of Africa****TABLE 330 REST OF AFRICA: PLANT-BASED PROTEIN MARKET, BY SOURCE,**

2018–2022 (USD MILLION)

TABLE 331 REST OF AFRICA: PLANT-BASED PROTEIN MARKET, BY SOURCE, 2023–2028 (USD MILLION)

TABLE 332 REST OF AFRICA: PLANT-BASED PROTEIN MARKET FOR FERMENTED PROTEIN, BY SUBTYPE, 2018–2022 (USD MILLION)

TABLE 333 REST OF AFRICA: PLANT-BASED PROTEIN MARKET FOR FERMENTED PROTEIN, BY SUBTYPE, 2023–2028 (USD MILLION)

12.6.3 MIDDLE EAST

12.6.3.1 Demand for plant-based convenience foods to drive growth of plant-based protein industry

TABLE 334 MIDDLE EAST: PLANT-BASED PROTEIN MARKET, BY COUNTRY, 2018–2022 (USD MILLION)

TABLE 335 MIDDLE EAST: PLANT-BASED PROTEIN MARKET, BY COUNTRY, 2023–2028 (USD MILLION)

TABLE 336 MIDDLE EAST: PLANT-BASED PROTEIN MARKET, BY SOURCE, 2018–2022 (USD MILLION)

TABLE 337 MIDDLE EAST: PLANT-BASED PROTEIN MARKET, BY SOURCE, 2023–2028 (USD MILLION)

TABLE 338 MIDDLE EAST: PLANT-BASED PROTEIN MARKET FOR FERMENTED PROTEIN, BY SUBTYPE, 2018–2022 (USD MILLION)

TABLE 339 MIDDLE EAST: PLANT-BASED PROTEIN MARKET FOR FERMENTED PROTEIN, BY SUBTYPE, 2023–2028 (USD MILLION)

12.6.3.2 Saudi Arabia

TABLE 340 SAUDI ARABIA: PLANT-BASED PROTEIN MARKET, BY SOURCE, 2018–2022 (USD MILLION)

TABLE 341 SAUDI ARABIA: PLANT-BASED PROTEIN MARKET, BY SOURCE, 2023–2028 (USD MILLION)

TABLE 342 SAUDI ARABIA: PLANT-BASED PROTEIN MARKET FOR FERMENTED PROTEIN, BY SUBTYPE, 2018–2022 (USD MILLION)

TABLE 343 SAUDI ARABIA: PLANT-BASED PROTEIN MARKET FOR FERMENTED PROTEIN, BY SUBTYPE, 2023–2028 (USD MILLION)

12.6.3.3 Rest of Middle East

TABLE 344 REST OF MIDDLE EAST: PLANT-BASED PROTEIN MARKET, BY SOURCE, 2018–2022 (USD MILLION)

TABLE 345 REST OF MIDDLE EAST: PLANT-BASED PROTEIN MARKET, BY SOURCE, 2023–2028 (USD MILLION)

TABLE 346 REST OF MIDDLE EAST: PLANT-BASED PROTEIN MARKET FOR FERMENTED PROTEIN, BY SUBTYPE, 2018–2022 (USD MILLION)

TABLE 347 REST OF MIDDLE EAST: PLANT-BASED PROTEIN MARKET FOR

FERMENTED PROTEIN, BY SUBTYPE, 2023–2028 (USD MILLION)**13 COMPETITIVE LANDSCAPE**

13.1 OVERVIEW

13.2 MARKET SHARE ANALYSIS

TABLE 348 PLANT-BASED PROTEIN MARKET: INTENSITY OF COMPETITIVE RIVALRY

13.3 STRATEGIES ADOPTED BY KEY PLAYERS

TABLE 349 STRATEGIES ADOPTED BY KEY PLAYERS

13.4 HISTORICAL REVENUE ANALYSIS FOR KEY PLAYERS

FIGURE 52 HISTORICAL REVENUE ANALYSIS FOR KEY PLAYERS, 2018–2022 (USD BILLION)

13.5 ANNUAL REVENUE VS. GROWTH (KEY PLAYERS)

FIGURE 53 ANNUAL REVENUE, 2022 (USD BILLION) VS. REVENUE GROWTH, 2020–2022

13.6 EBITDA OF KEY PLAYERS

FIGURE 54 EBITDA OF KEY PLAYERS, 2022 (USD BILLION)

13.7 GLOBAL SNAPSHOT OF KEY MARKET PARTICIPANTS

FIGURE 55 GLOBAL SNAPSHOT OF KEY MARKET PARTICIPANTS, 2022

13.8 COMPANY EVALUATION MATRIX FOR KEY PLAYERS

13.8.1 STARS

13.8.2 EMERGING LEADERS

13.8.3 PERVASIVE PLAYERS

13.8.4 PARTICIPANTS

FIGURE 56 COMPANY EVALUATION MATRIX FOR KEY PLAYERS, 2022

13.8.5 COMPANY FOOTPRINT

TABLE 350 COMPANY FOOTPRINT, BY SOURCE

TABLE 351 COMPANY FOOTPRINT, BY TYPE

TABLE 352 COMPANY FOOTPRINT, BY APPLICATION

TABLE 353 COMPANY FOOTPRINT, BY REGION

TABLE 354 OVERALL COMPANY FOOTPRINT

13.9 START-UP/SME EVALUATION MATRIX

13.9.1 PROGRESSIVE COMPANIES

13.9.2 RESPONSIVE COMPANIES

13.9.3 DYNAMIC COMPANIES

13.9.4 STARTING BLOCKS

FIGURE 57 START-UP/SME EVALUATION MATRIX, 2022

13.9.5 COMPETITIVE BENCHMARKING

TABLE 355 DETAILED LIST OF KEY START-UPS/SMES

TABLE 356 COMPETITIVE BENCHMARKING OF START-UPS/SMES

13.10 COMPETITIVE SCENARIO

13.10.1 PRODUCT LAUNCHES

TABLE 357 PLANT-BASED PROTEIN MARKET: PRODUCT LAUNCHES, 2019–2021

13.10.2 DEALS

TABLE 358 PLANT-BASED PROTEIN MARKET: DEALS, 2019–2022

13.10.3 OTHERS

TABLE 359 PLANT-BASED PROTEIN MARKET: OTHERS, 2019–2022

14 COMPANY PROFILES

14.1 KEY PLAYERS

(Business Overview, Products/Solutions/Services Offered, Recent Developments, MnM view (Key strengths/Right to win, Strategic choices made, Weakness/competitive threats)*

14.1.1 ADM

TABLE 360 ADM: BUSINESS OVERVIEW

FIGURE 58 ADM: COMPANY SNAPSHOT

TABLE 361 ADM: PRODUCTS/SOLUTIONS/SERVICES OFFERED

TABLE 362 ADM: PRODUCT LAUNCHES

TABLE 363 ADM: DEALS

TABLE 364 ADM: OTHERS

14.1.2 CARGILL, INCORPORATED

TABLE 365 CARGILL, INCORPORATED: BUSINESS OVERVIEW

FIGURE 59 CARGILL, INCORPORATED: COMPANY SNAPSHOT

TABLE 366 CARGILL, INCORPORATED: PRODUCTS/SOLUTIONS/SERVICES OFFERED

TABLE 367 CARGILL, INCORPORATED: OTHERS

14.1.3 INTERNATIONAL FLAVORS & FRAGRANCES INC.

TABLE 368 INTERNATIONAL FLAVORS & FRAGRANCES INC.: BUSINESS OVERVIEW

FIGURE 60 INTERNATIONAL FLAVORS & FRAGRANCES INC.: COMPANY SNAPSHOT

TABLE 369 INTERNATIONAL FLAVORS & FRAGRANCES INC.: PRODUCTS/SOLUTIONS/SERVICES OFFERED

14.1.4 INGREDION

TABLE 370 INGREDION: BUSINESS OVERVIEW

FIGURE 61 INGREDION: COMPANY SNAPSHOT

TABLE 371 INGREDION: PRODUCTS/SOLUTIONS/SERVICES OFFERED
TABLE 372 INGREDION: PRODUCT LAUNCHES
TABLE 373 INGREDION: DEALS
TABLE 374 INGREDION: OTHERS
14.1.5 ROQUETTE FR?RES
TABLE 375 ROQUETTE FR?RES: BUSINESS OVERVIEW
TABLE 376 ROQUETTE FR?RES: PRODUCTS/SOLUTIONS/SERVICES OFFERED
TABLE 377 ROQUETTE FR?RES: DEALS
TABLE 378 ROQUETTE FR?RES: OTHERS
14.1.6 WILMAR INTERNATIONAL LTD.
TABLE 379 WILMAR INTERNATIONAL LTD.: BUSINESS OVERVIEW
FIGURE 62 WILMAR INTERNATIONAL LTD.: COMPANY SNAPSHOT
TABLE 380 WILMAR INTERNATIONAL LTD.: PRODUCTS/SOLUTIONS/SERVICES OFFERED
14.1.7 GLANBIA PLC
TABLE 381 GLANBIA PLC: BUSINESS OVERVIEW
FIGURE 63 GLANBIA PLC: COMPANY SNAPSHOT
TABLE 382 GLANBIA PLC: PRODUCTS/SOLUTIONS/SERVICES OFFERED
TABLE 383 GLANBIA PLC: PRODUCT LAUNCHES
TABLE 384 GLANBIA PLC: DEALS
14.1.8 KERRY GROUP PLC
TABLE 385 KERRY GROUP PLC: BUSINESS OVERVIEW
FIGURE 64 KERRY GROUP PLC: COMPANY SNAPSHOT
TABLE 386 KERRY GROUP PLC: PRODUCTS/SOLUTIONS/SERVICES OFFERED
TABLE 387 KERRY GROUP PLC: DEALS
TABLE 388 KERRY GROUP PLC: OTHERS
14.1.9 DSM
TABLE 389 DSM: BUSINESS OVERVIEW
FIGURE 65 DSM: COMPANY SNAPSHOT
TABLE 390 DSM: PRODUCTS/SOLUTIONS/SERVICES OFFERED
TABLE 391 DSM: DEALS
14.1.10 AGT FOOD AND INGREDIENTS
TABLE 392 AGT FOOD AND INGREDIENTS: BUSINESS OVERVIEW
TABLE 393 AGT FOOD AND INGREDIENTS: PRODUCTS/SOLUTIONS/SERVICES OFFERED
TABLE 394 AGT FOOD AND INGREDIENTS: DEALS
14.1.11 BURCON NUTRASCIENCE CORPORATION
TABLE 395 BURCON NUTRASCIENCE CORPORATION: BUSINESS OVERVIEW
FIGURE 66 BURCON NUTRASCIENCE CORPORATION: COMPANY SNAPSHOT

TABLE 396 BURCON NUTRASCIENCE CORPORATION:
PRODUCTS/SOLUTIONS/SERVICES OFFERED

TABLE 397 BURCON NUTRASCIENCE CORPORATION: DEALS

TABLE 398 BURCON NUTRASCIENCE CORPORATION: OTHERS

14.1.12 EMSLAND GROUP

TABLE 399 EMSLAND GROUP: BUSINESS OVERVIEW

TABLE 400 EMSLAND GROUP: PRODUCTS/SOLUTIONS/SERVICES OFFERED

TABLE 401 EMSLAND GROUP: DEALS

14.1.13 PURIS

TABLE 402 PURIS: BUSINESS OVERVIEW

TABLE 403 PURIS: PRODUCTS/SOLUTIONS/SERVICES OFFERED

TABLE 404 PURIS: OTHERS

14.1.14 COSUCRA

TABLE 405 COSUCRA: BUSINESS OVERVIEW

TABLE 406 COSUCRA: PRODUCTS/SOLUTIONS/SERVICES OFFERED

TABLE 407 COSUCRA: PRODUCT LAUNCHES

TABLE 408 COSUCRA: OTHERS

14.1.15 TATE & LYLE

TABLE 409 TATE & LYLE: BUSINESS OVERVIEW

FIGURE 67 TATE & LYLE: COMPANY SNAPSHOT

TABLE 410 TATE & LYLE: PRODUCTS/SOLUTIONS/SERVICES OFFERED

TABLE 411 TATE & LYLE: DEALS

14.2 OTHER PLAYERS/START-UPS/SMES

14.2.1 BENEIO GMBH

TABLE 412 BENEIO GMBH: BUSINESS OVERVIEW

TABLE 413 BENEIO GMBH: PRODUCTS/SOLUTIONS/SERVICES OFFERED

TABLE 414 BENEIO GMBH: DEALS

TABLE 415 BENEIO GMBH: OTHERS

14.2.2 SOTEXPRO

TABLE 416 SOTEXPRO: BUSINESS OVERVIEW

TABLE 417 SOTEXPRO: PRODUCTS/SOLUTIONS/SERVICES OFFERED

14.2.3 SHANDONG JIANYUAN GROUP

TABLE 418 SHANDONG JIANYUAN GROUP: BUSINESS OVERVIEW

TABLE 419 SHANDONG JIANYUAN GROUP: PRODUCTS/SOLUTIONS/SERVICES
OFFERED

14.2.4 AMCO PROTEINS

TABLE 420 AMCO PROTEINS: BUSINESS OVERVIEW

TABLE 421 AMCO PROTEINS: PRODUCTS/SOLUTIONS/SERVICES OFFERED

TABLE 422 AMCO PROTEINS: OTHERS

14.2.5 AUSTRALIAN PLANT PROTEINS PTY LTD.

TABLE 423 AUSTRALIAN PLANT PROTEINS PTY LTD.: BUSINESS OVERVIEW

TABLE 424 AUSTRALIAN PLANT PROTEINS PTY LTD.:
PRODUCTS/SOLUTIONS/SERVICES OFFERED

14.2.6 NUTRAFERMA, INC.

TABLE 425 NUTRAFERMA, INC.: BUSINESS OVERVIEW

TABLE 426 NUTRAFERMA, INC.: PRODUCTS/SOLUTIONS/SERVICES OFFERED

14.2.7 MYCOTECHNOLOGY, INC.

TABLE 427 MYCOTECHNOLOGY, INC.: BUSINESS OVERVIEW

TABLE 428 MYCOTECHNOLOGY, INC.: PRODUCTS/SOLUTIONS/SERVICES
OFFERED

TABLE 429 MYCOTECHNOLOGY, INC.: PRODUCT LAUNCHES

TABLE 430 MYCOTECHNOLOGY, INC.: DEALS

TABLE 431 MYCOTECHNOLOGY, INC.: OTHERS

14.2.8 EUROPEAN PROTEIN A/S

TABLE 432 EUROPEAN PROTEIN A/S: BUSINESS OVERVIEW

TABLE 433 EUROPEAN PROTEIN A/S: PRODUCTS/SOLUTIONS/SERVICES
OFFERED

14.2.9 AXIOM FOODS, INC.

14.2.10 AMINOLA

14.2.11 THE GREEN LABS LLC.

14.2.12 ETCHEM

14.2.13 PROEON

Details on Business Overview, Products/Solutions/Services Offered, Recent Developments, MnM view (Key strengths/Right to win, Strategic choices made, Weakness/competitive threats) might not be captured in case of unlisted companies.

15 ADJACENT AND RELATED MARKETS

15.1 INTRODUCTION

TABLE 434 MARKETS ADJACENT TO PLANT-BASED PROTEIN MARKET

15.2 LIMITATIONS

15.3 PEA PROTEIN MARKET

15.3.1 MARKET DEFINITION

15.3.2 MARKET OVERVIEW

15.3.3 PEA PROTEIN MARKET, BY FORM

TABLE 435 PEA PROTEIN MARKET, BY FORM, 2017–2020 (USD MILLION)

TABLE 436 PEA PROTEIN MARKET, BY FORM, 2021–2027 (USD MILLION)

15.3.4 PEA PROTEIN MARKET, BY REGION

TABLE 437 PEA PROTEIN MARKET, BY REGION, 2017–2020 (USD MILLION)

TABLE 438 PEA PROTEIN MARKET, BY REGION, 2021–2027 (USD MILLION)

15.4 SOY PROTEIN INGREDIENTS MARKET

15.4.1 MARKET DEFINITION

15.4.2 MARKET OVERVIEW

15.4.3 SOY PROTEIN INGREDIENTS MARKET, BY TYPE

TABLE 439 SOY PROTEIN INGREDIENTS MARKET, BY TYPE, 2018–2021 (USD MILLION)

TABLE 440 SOY PROTEIN INGREDIENTS MARKET, BY TYPE, 2022–2027 (USD MILLION)

15.4.4 SOY PROTEIN INGREDIENTS MARKET, BY REGION

TABLE 441 SOY PROTEIN INGREDIENTS MARKET, BY REGION, 2018–2021 (USD MILLION)

TABLE 442 SOY PROTEIN INGREDIENTS MARKET, BY REGION, 2022–2027 (USD MILLION)

15.5 PROTEIN INGREDIENTS MARKET

15.5.1 MARKET DEFINITION

15.5.2 MARKET OVERVIEW

15.5.3 PROTEIN INGREDIENTS MARKET, BY SOURCE

TABLE 443 PROTEIN INGREDIENTS MARKET, BY SOURCE, 2019–2022 (USD MILLION)

TABLE 444 PROTEIN INGREDIENTS MARKET, BY SOURCE, 2023–2028 (USD MILLION)

15.5.4 PROTEIN INGREDIENTS MARKET, BY REGION

TABLE 445 PROTEIN INGREDIENTS MARKET, BY REGION, 2019–2022 (USD MILLION)

TABLE 446 PROTEIN INGREDIENTS MARKET, BY REGION, 2023–2028 (USD MILLION)

16 APPENDIX

16.1 DISCUSSION GUIDE

16.2 KNOWLEDGESTORE: MARKETSDANDMARKETS' SUBSCRIPTION PORTAL

16.3 CUSTOMIZATION OPTIONS

16.4 RELATED REPORTS

16.5 AUTHOR DETAILS

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