

Upcycled Food Ingredients Market Forecasts to 2032 – Global Analysis By Source (Agricultural By-Products, Fruit & Vegetable Pomace, Brewery & Distillery Waste, Dairy By-Products, Seafood By-Products, and Other Sources), Ingredient Type, Form, Distribution Channel, Application, End User, and By Geography

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Abstracts

According to Statistics MRC, the Global Upcycled Food Ingredients Market is accounted for \$2.2 billion in 2025 and is expected to reach \$3.7 billion by 2032 growing at a CAGR of 7.5% during the forecast period. Upcycled food ingredients involve converting food by-products and waste into new, high-value nutritional ingredients. Examples include fruit pulp into flour or spent grains into protein powders. It addresses food waste and sustainability concerns by creating a circular economy within the food supply chain. Driven by environmentally conscious consumers and brands seeking eco-friendly profiles, this market turns waste into profitable, nutrient-dense products, reducing environmental impact while meeting demand for sustainable food sources.

According to the Food and Agriculture Organization (FAO), upcycled food ingredient usage increased, diverting more than 2.5 million tonnes of waste into new food products in 2023.

Market Dynamics:

Driver:

Growing food waste reduction regulations and consumer demand

Increasing awareness of food waste and its environmental impact, coupled with stricter government regulations, is driving the adoption of upcycled food ingredients. Consumers are actively seeking sustainable, ethically sourced products, pushing brands to reformulate offerings using upcycled materials. Furthermore, initiatives promoting circular economy practices and corporate sustainability commitments encourage manufacturers to integrate these ingredients, enhancing brand reputation and compliance. Collectively, regulatory support and evolving consumer preferences are catalyzing market growth and investment in innovative upcycled solutions.

Restraint:

Limited supply chain infrastructure and collection systems

In many regions, fragmented collection networks, inadequate storage facilities, and inconsistent logistics restrict the efficient sourcing of raw materials for upcycled food production. Small-scale producers face high operational costs to gather and transport by-products, while perishability and quality control challenges reduce scalability. Moreover, the absence of standardized protocols for ingredient processing limits market penetration. These infrastructure gaps can slow adoption rates and hinder consistent product supply, posing significant barriers for manufacturers seeking to expand the market.

Opportunity:

Expansion into functional foods and nutraceuticals

Upcycled ingredients offer high nutritional value, including fibers, proteins, antioxidants, and bioactive compounds, making them ideal for functional foods and nutraceutical applications. Companies can leverage this opportunity to create value-added products such as fortified snacks, beverages, and dietary supplements. Additionally, rising health-consciousness and demand for natural, clean-label products support the integration of upcycled ingredients into innovative formulations. This expansion allows manufacturers to target premium segments, enhance product differentiation, and increase market share while contributing to sustainability objectives.

Threat:

Competition from conventional ingredients on price

Traditional ingredients often remain cheaper and more widely available than upcycled alternatives, creating cost pressure for manufacturers. Buyers may prioritize price over sustainability, especially in price-sensitive markets, limiting adoption. Moreover, large-scale conventional ingredient producers benefit from established supply chains and economies of scale, making it challenging for upcycled ingredients to compete. As a result, companies must balance pricing strategies with consumer education and marketing efforts to justify the higher costs of upcycled ingredients while promoting environmental and nutritional benefits.

Covid-19 Impact:

The pandemic disrupted supply chains and production of upcycled food ingredients due to labor shortages, logistics constraints, and temporary shutdowns of food processing units. However, heightened awareness of health, immunity, and sustainable consumption created renewed interest in functional and sustainable food products. Companies adapted by diversifying sourcing strategies and digital sales channels. Overall, while short-term operational challenges affected production, the crisis accelerated innovation, adoption of resilient supply chains, and consumer engagement, ultimately reinforcing long-term demand for upcycled ingredients.

The fruit & vegetable pomace segment is expected to be the largest during the forecast period

The fruit & vegetable pomace segment is expected to account for the largest market share during the forecast period. Pomace-based ingredients benefit from consistent supply from fruit and vegetable processing industries, ease of integration into various formulations, and proven nutritional benefits. Consumer demand for fiber-rich and plant-based products further drives adoption. Moreover, regulatory encouragement for reducing food waste supports pomace utilization. These combined advantages enable manufacturers to capture significant market share, strengthen product portfolios, and achieve sustainable growth, establishing fruit and vegetable pomace as the leading choice among upcycled food ingredients globally.

The powder segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the powder segment is predicted to witness the highest growth rate. Powdered upcycled ingredients enable precise incorporation into a wide range of product categories, including snacks, beverages, and nutraceuticals. Their compatibility with automated production lines and blending processes reduces operational

complexity. Furthermore, enhanced stability, convenience, and formulation flexibility encourage adoption among both small-scale and large-scale manufacturers. These factors, coupled with growing consumer awareness of health and sustainability benefits, position the powder segment as the fastest-growing category, offering significant market opportunities and innovation potential for ingredient suppliers.

Region with largest share:

During the forecast period, the Europe region is expected to hold the largest market share. Europe benefits from stringent food waste reduction regulations, robust sustainability policies, and high consumer awareness regarding eco-friendly products. Established supply chains, advanced processing facilities, and strong corporate commitments to circular economy practices support wide adoption of upcycled ingredients. Moreover, European consumers demonstrate a preference for natural, functional, and clean-label products, boosting demand for ingredients such as fruit and vegetable pomace. These factors collectively sustain Europe's position as the leading regional market for upcycled food ingredients.

Region with highest CAGR:

Over the forecast period, the Asia Pacific region is anticipated to exhibit the highest CAGR. Rapid industrialization, growing food processing activities, and increasing consumer awareness of nutrition and sustainability drive adoption in Asia Pacific. Emerging economies are witnessing investment in infrastructure and processing facilities to convert food by-products into high-value ingredients. Additionally, expanding urban populations and rising health-consciousness encourage demand for functional and fortified products containing upcycled ingredients. Local startups and multinational collaborations further accelerate innovation, positioning Asia Pacific as the fastest-growing region with substantial potential for market expansion and technological advancements.

Key players in the market

Some of the key players in Upcycled Food Ingredients Market include Renewal Mill, Upcycled Foods, Inc., EverGrain Ingredients, Barnana, Rubies in the Rubble, Toast Ale, Full Harvest, Misfits Market, WTRMLN WTR, Pulp Pantry, Kromkommer, ?IO, Revyve, RIND Snacks, PURIS, Olam Food Ingredients, Kerry, dsm-firmenich, Spudsy, and RE:Harvest.

Key Developments:

In July 2024, Global specialty ingredients solutions provider Barentz has inked a new distribution partnership with CrushDynamics, a company specializing in advanced fermentation technology and upcycled ingredients. The collaboration aims to leverage CrushDynamics' proprietary ingredients to enhance customer flavor profiles, nutritional value and sustainability. CrushDynamics also focuses on transforming grape derivatives and other agricultural side streams into high-performance food ingredients.

In April 2024, Where Food Comes From, Inc. (WFCF) the most trusted resource for independent, third-party verification of food production practices in North America, today announced that its recently acquired Upcycled Certified® Program is its fastest growing certification standard.

In June 2023, Renewal Mill, an early leader in the upcycled food movement, has just launched its third Upcycled Certified? ingredient, Upcycled White Corn Flour, a byproduct of the cornmeal milling process. This ingredient joins the company's existing portfolio of gluten-free, nutrient-dense, upcycled flours which currently includes Organic Okara Flour, made from the byproduct of soymilk production, and Oat Protein, made from the byproduct of oat milk production. Prior to Renewal Mill's intervention, the corn flour byproduct was going to food waste destinations such as animal feed, ethanol production, and landfill.

Sources Covered:

Agricultural By-Products

Fruit & Vegetable Pomace

Brewery & Distillery Waste

Dairy By-Products

Seafood By-Products

Other Sources

Ingredient Types Covered:

Proteins

Dietary Fibers

Oils & Lipids

Polyphenols & Antioxidants

Natural Colorants

Starches & Sugars

Flavors & Enzymes

Micronutrients

Forms Covered:

Powder

Liquid

Concentrate

Paste

Distribution Channels Covered:

B2B

B2C

Applications Covered:

Bakery & Confectionery

Beverages

Dairy & Frozen Desserts

Snacks & Savory Products

Meat Alternatives

Nutraceuticals & Supplements

Pet Food

Cosmetics & Personal Care

End Users Covered:

Food & Beverage Manufacturers

Ingredient Manufacturers

Retailers & Private Labels

Foodservice & Catering Companies

Pet Food Companies

Nutraceutical Firms

Regions Covered:

North America

US

Canada

Mexico

Europe

Germany

UK

Italy

France

Spain

Rest of Europe

Asia Pacific

Japan

China

India

Australia

New Zealand

South Korea

Rest of Asia Pacific

South America

Argentina

Brazil

Chile

Rest of South America

Middle East & Africa

Saudi Arabia

UAE

Qatar

South Africa

Rest of Middle East & Africa

What our report offers:

- Market share assessments for the regional and country-level segments
- Strategic recommendations for the new entrants
- Covers Market data for the years 2024, 2025, 2026, 2028, and 2032
- Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)
- Strategic recommendations in key business segments based on the market estimations
- Competitive landscaping mapping the key common trends
- Company profiling with detailed strategies, financials, and recent developments
- Supply chain trends mapping the latest technological advancements

Free Customization Offerings:

All the customers of this report will be entitled to receive one of the following free customization options:

Company Profiling

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

Regional Segmentation

Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)

Competitive Benchmarking

Benchmarking of key players based on product portfolio, geographical presence, and strategic alliances

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