

Hydrolyzed Vegetable Proteins Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028 Segmented By Source (Soy, Wheat, Corn, Pea, Others), By Function (Flavoring Agent, Emulsifying Agent, Others), By Application (Bakery & Confectionary, Processed Food Products, Meat Substitutes, Beverages, Others), By Region, By Competition Forecast & Opportunities, 2018-2028F

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Abstracts

Global Hydrolyzed Vegetable Proteins Market has valued at USD 1.19 billion in 2022 and is anticipated to project impressive growth in the forecast period with a CAGR of 5.89% through 2028. The global hydrolyzed vegetable proteins market refers to the industry involved in the production and distribution of hydrolyzed proteins derived from various plant sources. These proteins are processed through hydrolysis, which breaks down large protein molecules into smaller peptides, making them more digestible and suitable for use in various food and beverage products.

Key Market Drivers

Plant-Based Diet Trends

The global food industry is undergoing a significant transformation, with plant-based diets gaining momentum worldwide. As consumers become more health-conscious and environmentally aware, they are increasingly turning to plant-based alternatives for their nutritional needs. This shift in dietary preferences has a profound impact on the food ingredients market, particularly on hydrolyzed vegetable proteins. Plant-based diets are

no longer niche choices; they have entered the mainstream. More consumers are choosing to reduce their consumption of animal products or eliminate them entirely in favor of plant-based alternatives. This shift is driven by health considerations, ethical concerns, and environmental awareness. With plant-based diets, there is a growing demand for meat alternatives that provide the taste, texture, and nutritional profile of traditional animal-based products. Hydrolyzed vegetable proteins, derived from sources like soy, wheat, and peas, are essential ingredients in the formulation of plant-based meat substitutes. They play a crucial role in mimicking the flavor and texture of meat, making them an integral component of this burgeoning market. Hydrolyzed vegetable proteins are valued for their ability to enhance flavor in plant-based products. They provide the savory or umami taste that is often associated with meat, contributing to the palatability of vegetarian and vegan dishes. Additionally, these proteins can be fortified with essential amino acids and nutrients, improving the overall nutritional content of plant-based foods. Mimicking the texture and mouthfeel of meat is a significant challenge in plant-based product development. Hydrolyzed vegetable proteins can improve the texture and mouthfeel of plant-based products, making them more appealing to consumers. Whether it's a juicy burger patty or a tender piece of plant-based 'chicken,' these proteins play a vital role in achieving the desired product characteristics. Today's consumers are not only concerned about their health but also about the ingredients in the products they consume. Hydrolyzed vegetable proteins are considered clean label ingredients, as they are derived from natural sources and undergo minimal processing. This aligns with the clean label trend, making them an attractive choice for food manufacturers aiming to meet consumer demands for transparency and simplicity. The plant-based diet trend is not limited to Western markets. It is a global phenomenon, with increasing adoption in Asia, Latin America, and other regions. This global expansion is driving the demand for hydrolyzed vegetable proteins on a larger scale, as food companies worldwide seek to capitalize on this trend.

Clean Label and Natural Ingredients

Consumer preferences in the food industry are undergoing a significant transformation, with a growing demand for clean labels and natural ingredients. As people become more health-conscious and seek transparency in the products they consume, the global hydrolyzed vegetable proteins market is experiencing a surge in growth. Clean labels have become more than just a buzzword; it is now a guiding principle for many consumers. This trend is driven by a desire for transparency and a demand for products with fewer easily recognizable ingredients. Hydrolyzed vegetable proteins are gaining popularity because they align with clean label expectations, making them an attractive choice for food and beverage manufacturers. Hydrolyzed vegetable proteins are

produced through a process called hydrolysis, which breaks down large protein molecules into smaller peptides. This process is considered minimal compared to some other food processing techniques. As a result, hydrolyzed vegetable proteins are perceived as less processed and more natural, which resonates with consumers seeking clean label products. Hydrolyzed vegetable proteins are derived from plant sources such as soy, wheat, peas, and rice. This natural origin is a significant selling point, especially in a market where consumers are looking to reduce their reliance on animal-derived ingredients. The use of plant-based proteins further enhances the perception of naturalness. One of the key attributes of hydrolyzed vegetable proteins is their ability to enhance flavor naturally. They provide umami and savory notes, which are essential in many culinary applications. Instead of relying on artificial flavor enhancers, food manufacturers are increasingly turning to these proteins to improve the taste of their products naturally. Clean label products typically have shorter ingredient lists, which are more straightforward and easier to understand. Hydrolyzed vegetable proteins can be used to replace or reduce the need for certain additives or flavor enhancers, contributing to cleaner and simpler product formulations.

Rising Health and Wellness Awareness

In today's world, a global wave of health and wellness consciousness is sweeping across consumers of all demographics. People are becoming increasingly mindful of their dietary choices, seeking products that align with their health and wellness goals. This shift in consumer preferences is significantly contributing to the growth of the global hydrolyzed vegetable proteins market. As individuals become more health-conscious, they are scrutinizing their diets to make choices that promote well-being. Hydrolyzed vegetable proteins are emerging as a favorable option for those looking to improve their dietary habits. These proteins are derived from plant sources and are often considered a healthier alternative to some animal-based proteins, making them a natural choice for health-conscious consumers. The health and wellness movement often involves a shift towards reducing meat consumption. Many consumers are opting for flexitarian, vegetarian, or vegan diets to lower their intake of saturated fats and cholesterol associated with animal products. Hydrolyzed vegetable proteins are essential ingredients in plant-based meat alternatives, helping replicate the taste, texture, and nutritional profile of traditional meat products. Hydrolyzed vegetable proteins can be fortified with essential amino acids and nutrients, making them a valuable ingredient for enhancing the nutritional content of various food products. This is especially important for consumers who seek not only plant-based options but also products that offer balanced nutrition. Weight management and maintaining a healthy body weight are central to the health and wellness movement. Hydrolyzed vegetable proteins are often

used to create low-calorie, high-protein products that cater to individuals looking to manage their weight without compromising on taste or nutrition. Health-conscious consumers may also have specific dietary needs, such as gluten-free, dairy-free, or allergen-free diets. Hydrolyzed vegetable proteins can be used to formulate products that meet these dietary requirements, expanding their appeal to a broader audience. Alongside health awareness, consumers are increasingly looking for clean labels and natural products. Hydrolyzed vegetable proteins are perceived as clean label ingredients because they are derived from natural plant sources and undergo minimal processing. This aligns with the clean eating trend, making them an attractive choice for health-focused consumers.

Global Expansion and Emerging Markets

The global hydrolyzed vegetable proteins market is experiencing remarkable growth, driven by dynamic factors that extend far beyond established markets. As the world becomes increasingly interconnected and consumers worldwide embrace healthier and sustainable dietary choices, the global expansion into emerging markets is significantly boosting the hydrolyzed vegetable proteins market. Dietary preferences that were once specific to certain regions are now transcending borders. The global appetite for healthier and plant-based diets is fueling the demand for hydrolyzed vegetable proteins worldwide. People in emerging markets are becoming more health-conscious, adopting plant-based eating habits, and seeking clean label ingredients, aligning with global dietary trends. Emerging markets, particularly in Asia, Latin America, and Africa, are witnessing a rapid expansion of their middle-class populations. As disposable incomes rise, consumers in these regions are increasingly able to afford premium and health-focused food products. Hydrolyzed vegetable proteins, with their clean label and nutritional benefits, are well-suited to cater to this growing demographic. The ongoing urbanization trend in emerging markets is changing consumer lifestyles. People in urban areas have busier schedules and are seeking convenient, ready-to-eat food options. Hydrolyzed vegetable proteins can be incorporated into a wide range of processed and convenience foods, making them an ideal ingredient for manufacturers looking to cater to urban consumers. Improved logistics and the globalization of supply chains have made it easier for hydrolyzed vegetable protein producers to reach emerging markets. These advances reduce the cost of transportation and make it more feasible for manufacturers to distribute their products globally. The cultural acceptance of plant-based diets varies across regions, but there is a growing openness to alternative protein sources in many emerging markets. As consumers become more aware of the environmental and health benefits of plant-based diets, they are more willing to incorporate hydrolyzed vegetable proteins into their traditional cuisines.

Key Market Challenges

Allergenicity Concerns

One of the foremost challenges faced by the industry is allergenicity. Some hydrolyzed vegetable proteins, particularly those derived from soy and wheat, can trigger allergies in individuals with sensitivities to these ingredients. As consumer awareness of allergenic risks increases, food manufacturers must navigate labeling regulations and manage potential liabilities associated with allergen cross-contamination.

Cost of Production

Producing hydrolyzed vegetable proteins can be a complex and resource-intensive process. The cost of production, including raw materials, processing, and quality control measures, can be relatively high. In a competitive market, managing costs while maintaining product quality can be challenging for manufacturers.

Taste and Functional Challenges

Hydrolyzed vegetable proteins are often used to enhance the flavor and functionality of food products. However, achieving the desired taste and texture can be challenging, particularly in plant-based meat substitutes. Developing products that closely mimic the sensory attributes of traditional meat can require significant research and development efforts.

Competition from Other Ingredients

Hydrolyzed vegetable proteins face competition from a variety of other plant-based protein sources, such as pea protein, rice protein, and fungal protein. The choice of which protein source to use in formulations depends on factors like cost, taste, and nutritional profile. As new plant-based protein sources emerge, manufacturers must carefully assess their suitability for specific applications.

Key Market Trends

Plant-Based Boom Continues

The plant-based diet trend shows no signs of slowing down. Consumers are

increasingly opting for plant-based alternatives to meat and dairy, driven by health, environmental, and ethical considerations. Hydrolyzed vegetable proteins, derived from soy, wheat, peas, and other plant sources, will play a pivotal role in the formulation of plant-based meat and dairy substitutes.

Focus on Sustainability

Sustainability is a critical concern for consumers, and it extends to their dietary choices. Hydrolyzed vegetable proteins, which are sourced from renewable plant-based raw materials, align with sustainability goals. Brands that can demonstrate their commitment to environmentally responsible practices will have a competitive advantage.

Customized Protein Solutions

Food manufacturers are increasingly seeking customized hydrolyzed vegetable protein solutions that meet specific formulation needs. Whether it's enhancing flavor, improving texture, or fortifying with specific nutrients, the market is moving towards providing tailored protein solutions to cater to diverse product categories.

Diversification of Protein Sources

While soy and wheat have traditionally been dominant sources of hydrolyzed vegetable proteins, the market is diversifying. Manufacturers are exploring alternative protein sources, such as pulses (peas, lentils), rice, and even underutilized crops, to meet the growing demand for diverse plant-based options.

Segmental Insights

Source Insights

Based on the category of Source, the industry is divided into several segments, including soy, wheat, corn, peas, and others. In 2022, the soy category emerged as the dominant force in the market, primarily due to its cost-effectiveness and the widespread availability of soy crops. The demand for Hydrolyzed Vegetable Protein (HVP) derived from soy stems from its easy accessibility, health advantages, popularity in vegetarian and vegan diets, affordability, and its ability to enhance flavors. Soy is recognized as a valuable source of protein, and soy-based HVP serves as a comparatively healthy alternative to animal-based flavorings because it contains low levels of fat, calories, and cholesterol. Moreover, soy-based HVP is more budget-friendly than its animal-based

counterparts, making it a cost-effective choice for food manufacturers. Additionally, its robust umami flavor contributes to improving the taste of various food products while concealing undesirable flavors or bitterness in processed foods.

Looking ahead, the segment related to pea derived HVP is anticipated to experience a substantial CAGR from 2023 to 2030. Pea protein hydrolysate is a favored protein supplement among athletes, bodybuilders, and health-conscious individuals due to its high protein content and potential health advantages. These advantages include enhanced muscle growth, reduced muscle soreness, and lowered blood pressure. This makes it an appealing option for individuals seeking to boost their overall health and athletic performance. Furthermore, it is commonly employed in sports medicine due to its ability to enhance the absorption of amino acids compared to intact proteins, ensuring optimal nutrient delivery to muscles. In addition to its health benefits, pea HVP is devoid of common allergens such as dairy, soy, and gluten, making it a safe selection for individuals with food allergies or sensitivities.

Application Insights

Based on the category of Application, the market is categorized into bakery and confectionery, processed food items, meat alternatives, beverages, and other sectors. In 2022, the processed food products segment emerged as the dominant force in the industry, accounting for the largest share of revenue. This was primarily attributed to the increasing utilization of Hydrolyzed Vegetable Protein (HVP) in processed food products. HVP is a versatile ingredient widely employed in the food industry due to its capacity to enhance both flavor and texture, alongside its cost-effectiveness and ease of incorporation. In processed foods, HVP is commonly utilized as an emulsifying agent, a flavor booster, and a texture modifier.

The growing demand for processed foods, driven by their convenience, extended shelf life, and evolving consumer lifestyles, is expected to boost the demand for HVP as a key component in these products. On the other hand, the meat substitutes sector is projected to record the most rapid Compound Annual Growth Rate (CAGR) from 2023 to 2030. HVP is frequently harnessed as an ingredient in meat alternatives, such as plant-based burgers or meatless meatballs, to impart a meat-like flavor and texture. It can also serve as a seasoning or flavor enhancer in a wide array of vegetarian and vegan dishes. An advantage of using HVP in place of meat is its typically lower cost, making it an economical choice for individuals on a budget. Additionally, being plant-based, it aligns well with the preferences of vegetarians and vegans.

Regional Insights

In terms of revenue, North America asserted its dominance in the industry during 2022, primarily due to the presence of a substantial and well-established food and beverage sector. This sector generated a significant need for Hydrolyzed Vegetable Protein (HVP) as both a flavor enhancer and a functional ingredient. Moreover, the increasing appetite for processed and convenient food offerings in the region played a pivotal role in boosting market expansion. Additionally, North America boasts a highly developed healthcare industry that incorporates HVP into medical nutrition products. Furthermore, the region experiences a high prevalence of various health conditions, such as obesity and diabetes, which has resulted in an elevated demand for healthier food choices, including products containing HVP.

Looking ahead, the Asia Pacific region is poised to witness a lucrative CAGR from 2023 to 2030, driven by several factors. These include the growing demand for natural and plant-based food components and an increased awareness of the health benefits associated with protein consumption. Additionally, the region stands as the largest producer of plant-based protein sources like soybeans and wheat, further bolstering market expansion.

Key Market Players

Ajinomoto Co Inc

Kerry Group PLC

Shanghai Aipu Food Industry Co Ltd

Titan Bio-tech Ltd

Cargill Inc

Roquette Freres SA

DSM BV

Tate & Lyle PLC

Archer-Daniels-Midland Co

Griffith Foods SA De CV

Report Scope:

In this report, the Global Hydrolyzed Vegetable Proteins Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Hydrolyzed Vegetable Proteins Market, By Source:

Soy

Wheat

Corn

Pea

Others

Hydrolyzed Vegetable Proteins Market, By Function:

Flavoring Agent

Emulsifying Agent

Others

Hydrolyzed Vegetable Proteins Market, By Application:

Bakery & Confectionary

Processed Food Products

Meat Substitutes

Beverages

Others

Hydrolyzed Vegetable Proteins Market, By Region:

North America

United States

Canada

Mexico

Europe

Germany

United Kingdom

France

Italy

Spain

Asia-Pacific

China

Japan

India

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Kuwait

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Hydrolyzed Vegetable Proteins Market.

Available Customizations:

Global Hydrolyzed Vegetable Proteins market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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