

Protein Ingredient Powders

ANMD-MRS13-123 · Sustainable Food & Alternative Protein Technologies

A Global Sustainability Due Diligence & Market Research Study

History 2020–2024 · Base Year 2025 · Forecast 2025–2032 · Outlooks 2035 / 2040 / 2050 · Currency US\$

WHY THIS REPORT

Protein ingredient powders are the functional backbone of the alternative-protein and nutrition economy — the pea, soy, rice and fermentation-derived isolates and concentrates that supply protein content, texture and nutrition to meat analogs, beverages, bakery and sports nutrition. As a B2B ingredient layer, their functionality, taste-neutrality and cost determine what end-product makers can build. This decision-grade study sizes the global market three ways — value, volume (tonnes/kg) and products/SKUs — across protein source, functional form and application, across seven regions and four scenarios to 2032, with outlooks to 2050.

SUSTAINABILITY & SDG IMPACT — THE ANMD LENS

Sustainability is this report's backbone, not an afterthought. Plant-protein ingredients enable lower-footprint diets, advancing nutrition, food security and resource efficiency.

Mapped Sustainable Development Goals:

| | | | | |
|-----------------------------|--|---|---------------------------------|-------------------------------|
| SDG 2 Zero Hunger | SDG 3 Good Health & Well-being | SDG 12 Responsible Consumption & Production | SDG 13 Climate Action | SDG 15 Life on Land |
|-----------------------------|--|---|---------------------------------|-------------------------------|

Measurable sustainability outcomes assessed:

- Lower-footprint protein supply for human nutrition
- Diversification of protein sources beyond animal agriculture
- Crop-sourcing land and water impact as a material risk
- Processing energy and supply-chain traceability assessed

Framework alignment: Double materiality mapped to GRI, SASB, ISSB, TCFD, TNFD, CSRD and the EU Taxonomy, with greenwashing and SDG-washing screens applied throughout.

WHAT'S INSIDE AT A GLANCE

| | | | |
|------------------------------------|-------------------------------|----------------------------------|-------------------------------|
| 53 Chapters | 9 Report Parts | 7 Regions Covered | 40+ Country Markets |
| 2025–32 Forecast Horizon | 4 Forward Scenarios | 25+ Companies Profiled | 5 SDGs Mapped |

REPORT COVERAGE

Geographic scope: North America, Europe, Asia Pacific, Latin America, Africa, Middle East and Rest of World — with named country intelligence. North America leads supply scale; Europe holds pea-protein and specialty strength; Asia Pacific scales fastest; other regions assessed on their own merits.

- Functional protein supply for meat analogs, beverages and bakery
- High-functionality isolates command premiums over commodity concentrates
- Taste-neutral, soluble, scalable B2B ingredient layer
- Crop-sourcing footprint, processing energy and off-taste as material risks

MARKET OVERVIEW

From commodity concentrate to high-functionality isolate — where taste-neutral, soluble protein powers the alt-protein economy.

Protein ingredient powders are moving from commodity concentrates to high-functionality isolates. Demand is driven by alternative-protein formulation, sports and active nutrition, and clean-label reformulation across North America, Europe and Asia Pacific. The market is read three ways — value, volume and products/SKUs — and forecast under four scenarios, each region reported separately.

- **North America leads supply scale** — United States and Canada, anchored by Archer Daniels Midland Company, Cargill, Incorporated, Ingredion Incorporated and PURIS across soy and pea protein
- **Europe holds pea and specialty strength** — France, Belgium and Germany, where Roquette Frères, Cosucra Groupe Warcoing SA and Emsland Group lead pea protein
- **Functionality is the differentiator** — taste-neutral, soluble, high-functionality isolates command premiums over commodity concentrates
- **Functional form segments the value** — isolate, concentrate and textured/functional, each with distinct application and margin

REGIONAL OUTLOOK

Across seven reporting regions, the report separates leading markets from high-growth and emerging ones — each profiled in full rather than aggregated into Rest of World.

| Region | Stage | Lead Country Markets & Drivers |
|---------------|---------------------|--|
| North America | Supply-scale leader | United States, Canada — ADM, Cargill, Ingredion, PURIS |
| Europe | Pea & specialty hub | France, Belgium, Germany — Roquette, Cosucra, Emsland |
| Asia Pacific | Scaling | China, Australia — protein-ingredient demand & supply |
| Middle East | Emerging | UAE, Israel — formulation & import demand |
| Latin America | Emerging | Brazil, Argentina — soy-protein supply |
| Africa | Frontier | South Africa — ingredient demand |

KEY MARKET DRIVERS & RESTRAINTS

| Drivers | Restraints |
|--|---|
| <ul style="list-style-type: none"> • Alternative-protein formulation demand • Sports & active-nutrition growth • Clean-label & taste-neutral reformulation • Plant-protein supply scale-up • Diversification beyond soy | <ul style="list-style-type: none"> • Off-taste & functionality challenges • Commodity & crop-price volatility • Supply concentration & sourcing risk • Capex of isolation capacity • Price competition in commodity grades |

SEGMENTATION SNAPSHOT

| | |
|---------------------------|---|
| By Protein Source | Pea isolates · soy isolates/concentrates · rice & other plant · fermentation-derived · blended functional |
| By Functional Form | Isolate · concentrate · textured / functional |
| By Application | Meat analogs · beverages · bakery · sports nutrition |
| By End User | Food brands · manufacturers · retail · foodservice |
| By Business Model | Branded products · ingredient supply · licensing |
| By Channel | Retail / CPG · foodservice · ingredient / B2B |

TECHNOLOGY & APPLICATION FINDINGS

Where the category is differentiating fastest — the technology and application fronts that separate leaders from followers:

- **Pea & soy isolates** — high-purity isolates anchor meat-analog and beverage formulation
- **Texturised proteins** — extruded textured proteins deliver structure for meat alternatives
- **Fermentation-derived** — novel functional proteins broaden the ingredient toolbox beyond crops

TABLE OF CONTENTS — PARTS & CHAPTERS

The full report is organised into nine parts across 53 chapters, listed below. Detailed sub-headings, country tables and directories are provided in the full report.

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COMPETITIVE & INVESTMENT SNAPSHOT

The competitive field is led by global ingredient majors and protein specialists. Deal activity — capacity expansion, source diversification and functionality acquisitions — signals a market consolidating around high-functionality, scaled protein supply.

Representative players profiled in the full report:

Archer Daniels Midland Company · Cargill, Incorporated · Roquette Frères · Ingredion Incorporated · dsm-firmenich AG · Kerry Group plc · PURIS · and 20+ further profiled players.

Investment intelligence: venture, infrastructure, development, climate and blended finance, green bonds and sustainability-linked loans — culminating in a bankability assessment and a conditional investment view.

KEY QUESTIONS THIS REPORT ANSWERS

- How large is the global protein ingredient powders market, and how fast will it grow to 2032?
- Which regions, countries and segments offer the strongest risk-adjusted opportunity?
- Which technologies and sources reshape the addressable market and the cost curve?
- Who leads, and where is the competitive and patent white space?
- Is the investment case bankable — and under what conditions?
- How does the category align with the SDGs, nutrition, food security and disclosure regulation?

WHY ANMD — THE DIFFERENCE

Most market studies stop at units and revenue. This report is built as a sustainability due diligence instrument — fusing market sizing with ESG, SDG, nutrition, climate, water and natural-capital intelligence and a decision-ready bankability view in a single architecture.

- **Triangulated sizing** — every market read three ways so value, volume (tonnes/kg) and the products/SKUs view reconcile rather than conflict.
- **Region-honest forecasting** — Latin America, Africa and the Middle East reported in full, never hidden inside Rest of World, every forecast resolved to the 2025 base year.
- **Integrated evidence base** — company, patent and project databases linked to the analysis, with published-filing patents and FTO treated as an indicator, not a legal conclusion.
- **No-fabrication discipline** — every estimate carries a data-confidence rating and disclosed sources; gaps are flagged for further diligence, never filled with invented numbers.
- **Anti-greenwashing rigour** — SDG-washing and greenwashing screens plus claim-substantiation checks built into the ESG and project analysis.
- **Decision-first structure** — 9 Parts and 53 Chapters culminating in stakeholder playbooks and a clear, conditional investment view.

WHO SHOULD BUY THIS REPORT

Food brands, manufacturers, ingredient suppliers, retailers, foodservice, investors and policymakers, and strategic corporate planners and decision-makers.

Access the Full Report

The complete report delivers all 53 chapters in full, with every sub-heading, country table, company and patent directory, forecast model and due diligence checklist.

Purchase at www.anewmarketdynamics.com · Standard & Premium licences · Single-Site (SSL) and Global-Site (GSL) options at checkout.

Want the Complete Detailed Table of Contents?

This prospectus lists the nine parts and 53 chapters. The complete detailed table of contents — every sub-heading, country table, exhibit, company and patent directory and annex — is available on request to registered users. To receive it, register with your official company email at www.anewmarketdynamics.com. The full detailed table of contents will be sent directly to your registered company email address.