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	SDG 3	SDG 12	SDG 13	SDG 15
Zero Hunger	Good Health & Well-being	Responsible Consumption & Production	Climate Action	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
• Alternative-protein formulation demand • Sports & active-nutrition growth • Clean-label & taste-neutral reformulation • Plant-protein supply scale-up • Diversification beyond soy	• 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.

Part V — Company, Competition, Patent and Project Intelligence

Part VI — Sustainability, ESG, SDG, Climate and Natural-Capital Intelligence

Part VII — Supply Chain, Policy, Legal, Economics and Finance

Part VIII — Scenario, Future Intelligence and Final Due Diligence Verdict

Part IX — Annexes, Directories and Reference Material

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.