

Protein Ingredients Market Assessment & Forecasts Global

MULTICLIENT PROPOSAL

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by

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1. INTRODUCTION

Giract is the leading market research company, with over 50 years' experience in researching and analysing the global ingredients markets. Based in Geneva, Switzerland, Giract works through its international offices and global network of leading industry experts to bring unparalleled coverage of the worlds ingredients markets.

Giract is well known in the field of protein ingredients through its numerous market research studies and protein-focused events. Examples are listed below.

Selected Examples of Giract's Protein Ingredients Research and Events

Year	Multiclient Report/Event
2020	Pulse Protein Ingredients, Global
2020	Algal Protein Ingredients, North America & Europe
2019	Ingredients for Meatless Foods 2019, North America, Europe, ASEAN, ANZ
2019	Protein Ingredients, Global
2018	Ingredients for Meatless Foods 2018, North America & Europe
2016	Performance Nutrition, USA & Europe
2016	Protein Ingredients, Global
2014	GiTEX; Cereal Partners Worldwide (Nestlé and General Mills), The Power of Protein
2014	Protein Ingredients, Global
2010	Protein Ingredients, Global

2. OBJECTIVES

The objective of this study is to provide a deep and clear understanding of key protein ingredients markets. This will be accomplished through provision of the following:

- Production volumes (kt) by country and manufacturer (split by ingredient source and format)
- Trade and availability [volume (kt) and value (USD/local currency)] by country/region (split by ingredient source and format)
- Indicative prices by country/region (split by ingredient source and format)
- Legislation by country/region
- Current (2019/2020 depending on ingredient) ingredient demand [volume (kt) and value (USD/local currency)] by country/region and by end-use category (split by ingredient source and format)
- Forecast (2025) ingredient demand [volume (kt) and value (USD/local currency)] by country/region and by end-use category (split by ingredient source and format)
- Assessment of the impact of Covid-19 on the pulse protein ingredients market
- End-user perspectives

3. SCOPE

3.1. INGREDIENTS

- Pea proteins
 - Concentrate 80%
 - Isolate
 - Textured
- Potato proteins
 - Concentrate
 - Textured
- Rice proteins
 - Concentrate
 - Isolate
- Fava bean proteins
 - Concentrate
- Lentil proteins
 - Concentrate
- Chickpea protein
 - Concentrate
- Soy proteins
 - Defatted flour
 - Concentrate
 - Isolate
 - Hydrolysate
 - Textured
- Wheat proteins
 - Gluten
 - Isolate
 - Hydrolysate
 - Textured
- Milk proteins
 - Concentrate
 - Isolate
 - Hydrolysate
- Whey proteins
 - Concentrate 35%
 - Concentrate 80%
 - Isolate
 - Hydrolysate

- Fungal protein
 - All types considered collectively
- Algal protein
 - Microalgal powders, split by *Spirulina*, *Chlorella*, and other microalgae
- Mungbean protein
 - Isolate

N.B. Protein ingredients are defined as having a minimum protein content of 50%, as this level is required to fulfil technical and nutritional functionalities. WPC35 an exception, and included due to its nutritional role

3.2. GEOGRAPHICAL REGION

North America (USA/Canada), Mexico, Europe, China, India, ASEAN, RoW

N.B. algal protein is covered in North America (USA/Canada) and EU27+UK+NO+CH only

3.3. SCOPE AND COVERAGE

- Production volumes (kt) by country and manufacturer (split by ingredient source and format)
- Manufacturer profiles
- Trade and availability [volume (kt) and value (USD/local currency)] by country/region (split by ingredient source and format)
- Indicative prices by country/region (split by ingredient source and format)
- Legislation by country/region
- Ingredient demand [volume (kt) and value (USD/local currency)] by country/region and by end-use category (split by ingredient source and format)
- Forecast ingredient demand [volume (kt) and value (USD/local currency)] by country/region and by end-use category (split by ingredient source and format)
- End-user perspectives
- Covid-19 impact (*pulse protein ingredients only*)

3.4. DEMAND SECTORS

- Food
 - Bakery
 - Dairy
 - Processed meat
 - Meat analogues
 - Functional foods/supplements
 - Clinical/infant
- Feed
 - Pet food
 - Animal/aquaculture feed

N.B. Algal protein is covered in the functional foods/supplements category only

3.5. TIMEFRAME

- Pea proteins, fava bean proteins, lentil proteins, chickpea proteins, soy proteins, algal proteins, mungbean proteins
 - Current: 2020
 - Forecasts: 2025
- Potato proteins, rice proteins, fungal proteins, soy flour (defatted), wheat proteins, milk proteins, whey proteins
 - Current: 2018/19 (study conducted in 2019; whole-year data featured in the study, for example trade data, is for 2018)
 - Forecasts: 2023

4. REPORT/BUDGET/PRESENTATION

4.1. REPORT FORMAT

The report will be presented as a slide deck in PDF format.

4.2. BUDGET

The project can be accomplished with a budget of **EUR #####**.

4.3. PRESENTATION

A presentation of the study will be delivered following submission of the report. There is no time cost for the preparation of this presentation. Travel and accommodation for two Giract personnel will be charged on actuals, if the presentation is to be held at the client's offices. Alternatively, the presentation can be made online, for which there is no additional cost.

5. GIRACT TEAM

The Giract research team calls on over 50 years of research experience in the ingredients and end-product markets, together with a wide range of multi-client and proprietary studies in all the major categories of food ingredients. The Giract team includes:

Dr. Velamur Krishnakumar: B.Tech (Chem), MBA, Dipl. Computer Science, PhD in Management Science: Managing Director of Giract. Krishna's early work experience was in consumer marketing – first in McCann Erickson Advertising and later as Product Manager at what is currently known as GlaxoSmithKline. He then joined Giract in Geneva, Switzerland where he is currently the Managing Director. Krishna has published many articles on food ingredients and has addressed various International Conferences. He is a Professional Member of the IFT and has chaired the Vitafoods Conference over many years. With a vast experience in international food and food ingredient markets, he has managed numerous strategic and operational projects across almost all ingredient sectors. He also chaired many other ingredient conferences including omega 3, fibres, probiotics, etc.

Dr. Graham C. Robinson: PhD Biochemistry (Cambridge, UK). Graham has spent 10 years working in research laboratories, first in Norwich and then in Cambridge in the UK, as well as Geneva, Switzerland. He is a specialist in fermentation technology, bioreactors, and microbial production methods, and has substantial experience of small-molecule production, processing, and purification techniques. He joined Giract in 2017, in order to bring his technical expertise to the world of technical ingredients.

Dr. Kaushik Ramakrishnan Shankar: PhD Biotechnology. Kaushik has taught courses in sensory analysis of foods, practical food analysis, and Intellectual property at Anna University, Chennai. He began his professional career with PR Biotech, a start-up manufacturing Stevia based sweeteners, where he was responsible for product formulation and start-up of the production unit. Kaushik moved on to Frost and Sullivan in 2009 where he analysed global markets for food and beverage ingredients. He joined Giract as an analyst in 2012.

Dr. Russell Ward: PhD Surface Chemistry (Bristol, UK). After post-doctoral research at CNRS in France, his career in consumer products began with Unilever. For Benckiser he was responsible for launching detergent products in Hungary, Romania and China. Russell worked for Danone as Development Director Dairy – Central & Eastern Europe and for Sara Lee as VP R&D Coffee & Tea. In 2008, he established his own consultancy and, as an Associate to Giract, has been responsible for Giract's GiTex events and contributed to studies on soluble fibres, infant formula, bakery enzymes and protein ingredients. He joined Giract as Consultant – Research and Marketing Director in January 2012, and is now a Partner of the company.