Business Review

Pulse Protein Ingredients Market

Supply and Demand – Global

2020 – 2025

INTRODUCTION

The United Nations Food and Agriculture Organization (FAO) recognizes 11 types of pulses: dry beans, dry broad beans, dry peas, chickpeas, cowpeas, pigeon peas, lentils, bambara beans, vetches, lupins and pulses (not elsewhere specified – minor pulses that do not fall into one of the other categories). Of these, dry peas, chickpeas, lentils, and lupins are available as protein ingredients, i.e. >50% protein content. They can either be just plain flours from dehulled pulses containing 55% protein or isolates with more than 80% protein content.

Since the UN declared 2016 as the year of pulses, there has been great interest in utilizing these high protein sources in processed food. This was part of an effort to push animal proteins off the centre of the plate and make plant proteins take centre stage. One of the significant applications of these products has been in the meatless space, where meat analogs are created using concentrates or isolates of proteins. While soy and wheat are largely used, various factors including allergenicity, GM issues, and organoleptic properties have led to pea and chickpea being explored as alternatives, quite successfully.

Of all the pulses, pea has already become a mainstream protein ingredient raw material. A long gestation period of more than a decade was required to make pea protein isolates into commercially successful products, with adjustments in volume, price, and organoleptic properties. A large number of companies have now invested in pea protein ingredient manufacturing facilities, including Roquette and many in China. Fava and chickpea proteins are gaining importance, the latter crop having a UN mandate for cultivation promotion in semi-arid tropics. The protein profiles of fava and chickpea are suitable for both nutritional and functional roles in processed foods. Lupin and lentils are yet to obtain volume growth to become significant competitors in the pulse protein ingredient space. However, there is growing interest in these raw materials and they may become, as pea and chickpea, major competitors in the future.

Giract has been tracking the global market for protein ingredients for many years and has successfully published studies, the latest in 2019. The current study focuses specifically on pulse proteins due to the renewed interest in exploring alternative sources of protein ingredients, especially in the light of COVID-19 which is causing disruption in the global processed food industry supply chains. Giract will explore this aspect during the research into this exciting category of proteins.

OBJECTIVES

The main objective is to provide a global supply/demand picture of pulse proteins. This translates into the following sub-objectives:

- Identify producers and global production volume of the key pulse protein ingredients, by region and producer
- Track trade between different regions to arrive at availability defined by Production + Import – Export = Availability
- Obtain price and price trends
- Split demand for each protein ingredient by specific food sector
- Discuss with demand companies their unmet needs and future plans to arrive at trends in the market and forecast volumes for the ingredients
- Impact of COVID-19 on pulse protein ingredients supply: short-term, mid-term, and long-term

PRODUCTS

Pulse protein ingredients (>50% protein content) – flours, concentrates and isolates from pea, fava, chickpea, soy, others

SECTORS

Food (Bakery, Dairy, Processed meat, Meat analogs, Functional foods/supplements, Clinical/infant nutrition, others), Feed (pet food, animal feed)

GEOGRAPHIC

USA/Canada, Mexico, Europe, China, India, ASEAN, RoW

TIMESCALE

Current estimates for 2020 with forecasts to 2025

SUBSCRIPTION

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