Yellow Pea: the Trending Protein
The European Perspective

How to Win in the Fast-Growing Plant Protein Supply Chain?

Multiclient Study
Published November 2025

contact@girafood.com

Contact: l.bajard@girafood.com

www.girafood.com

A **complete strategic study** for suppliers, distributors and food manufacturers navigating the next wave of pea protein innovation, pricing pressure and supply consolidation across Europe.

Scope

Products	**5 products**: dry pea, yellow pea protein concentrates, isolates, hydrolysates, textured pea protein.
Variables	Production, imports, exports, consumption.
Countries	**EU-27** as a whole + details for **6 countries**: Germany, France, the United Kingdom, Italy, the Netherlands and Spain.
Years covered	2014, 2024, 2025 estimates, 2029 forecasts.
Applications	**Meat alternatives**, **dairy alternatives**, **bakery, snacks**, **sport nutrition** (powder, beverage, bar). Additional insights on medical, senior and infant nutrition.
Methodology	**Bottom-up** and **top-down** market approaches for calculating consumption volumes.

What you get

Full report (130 pages)	**Comprehensive market analysis covering each protein** (isolates, concentrates, hydrolysates, and textured) within selected EU countries and applications.
Webinar	Meeting with your team to go through our key research conclusions, specific insights from the study, and answers to your questions. Enables clients to maximise value from the research and disseminate insights to key staff.

Report, timing and cost

Report + webinar	Readily available (published end-October 2025): 130 pages. Electronic, printable and searchable PDF file. Report published in English. Tailored presentation of the results to your team (1 hour including Q&A).
Cost	Full subscription: **EUR 9,500** (before any applicable tax) for both the report and a tailored presentation.

© Gira 2025

Objectives and Coverage

Study Objectives (1/2)

Provide robust data for a market poised for expansion

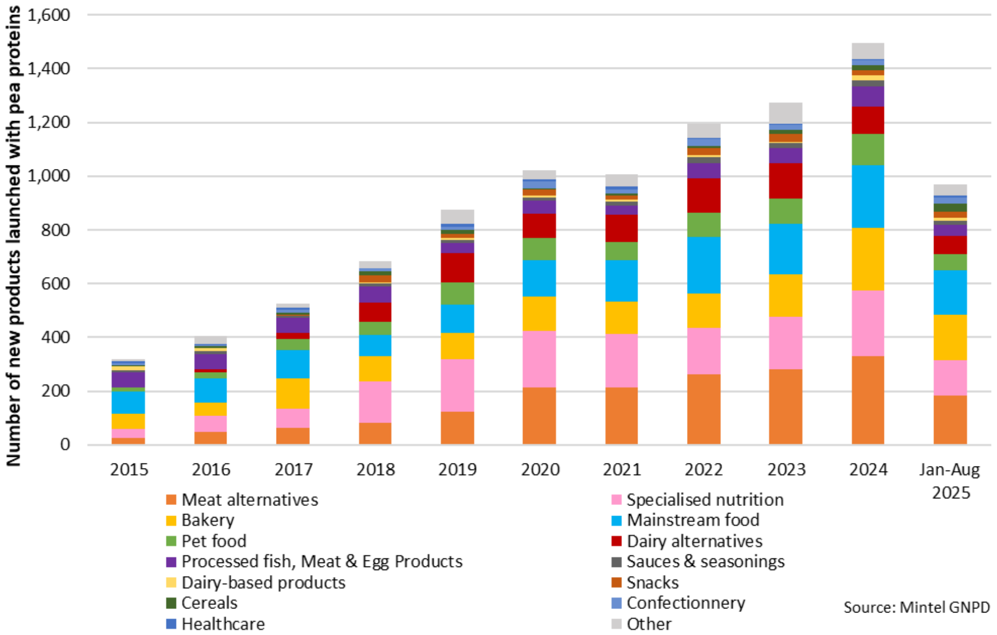
In 2025, the European pea protein market is in a phase of **strategic recalibration**.

- While consumer enthusiasm for plant-based diets remains strong, sales in core categories like plant-based meat have been lower than expected in several countries.
  → Innovation and reformulation are critical to boost sales and improve product taste and texture.
- The number of new products developed containing pea proteins has been growing fast in retail in the past few years (especially within **bakery**, **mainstream foods,** and **specialised nutrition**), according to Mintel GNPD.
  → We have been observing fast market growth of pea proteins in comparison to other leguminous plants within several applications.
  → Strengthening the penetration of ingredients into high-value, high-growth-potential sectors is becoming essential.
  → Process improvement permit applications extensions
- Increasing **uncertainties in global trade flows**, with shifting dynamics between the US, China, and Europe, are reshaping the landscape for pea production, processing, and exports.
  → Processors will need to rethink their strategy, in the face of increasing competition from cheaper raw materials.

The market is poised for expansion, supported by increasing consumer demand across diverse applications, changing eating habits, and rapid innovation, enhancing product quality and versatility.

- The European pea protein market remains a key driver for plant-based innovation, supported by regulatory developments, R&D funding, and consumer awareness of nutritional profiles and sustainability.
- Our goal is to **map current trends**, assess **future opportunities**, and provide **strategic** insights for stakeholders along the value chain, with the **ambition of bringing robust data to typically underexplored areas.**

Evolution of NPD by application in EU-27+UK, 2015-25 (in retail)



Source: Mintel GNPD

Application	Share over total in 2024	Evolution 2024/2023
Meat alternatives	22.1%	17%
Specialised nutrition	16.3%	25%
Bakery	15.7%	47%
Mainstream food	15.6%	25%
Pet food	7.8%	21%
Dairy alternatives	6.8%	-24%
Processed fish, Meat & Egg Products	5.0%	39%
Sauces & seasonings	1.5%	10%
Dairy-based products	1.4%	425%
Snacks	1.3%	-34%
Cereals	1.2%	20%
Confectionnery	1.1%	-6%
Healthcare	0.3%	0%
Other	4.1%	-24%
Total	**100.0%**	17%

** mainstream foods include savoury spreads, sandwiches, pizzas, pasta, salads, dips, frozen and chilled desserts, dry soup, prepared meals, potato products, etc.*

Study Objectives (2/2)

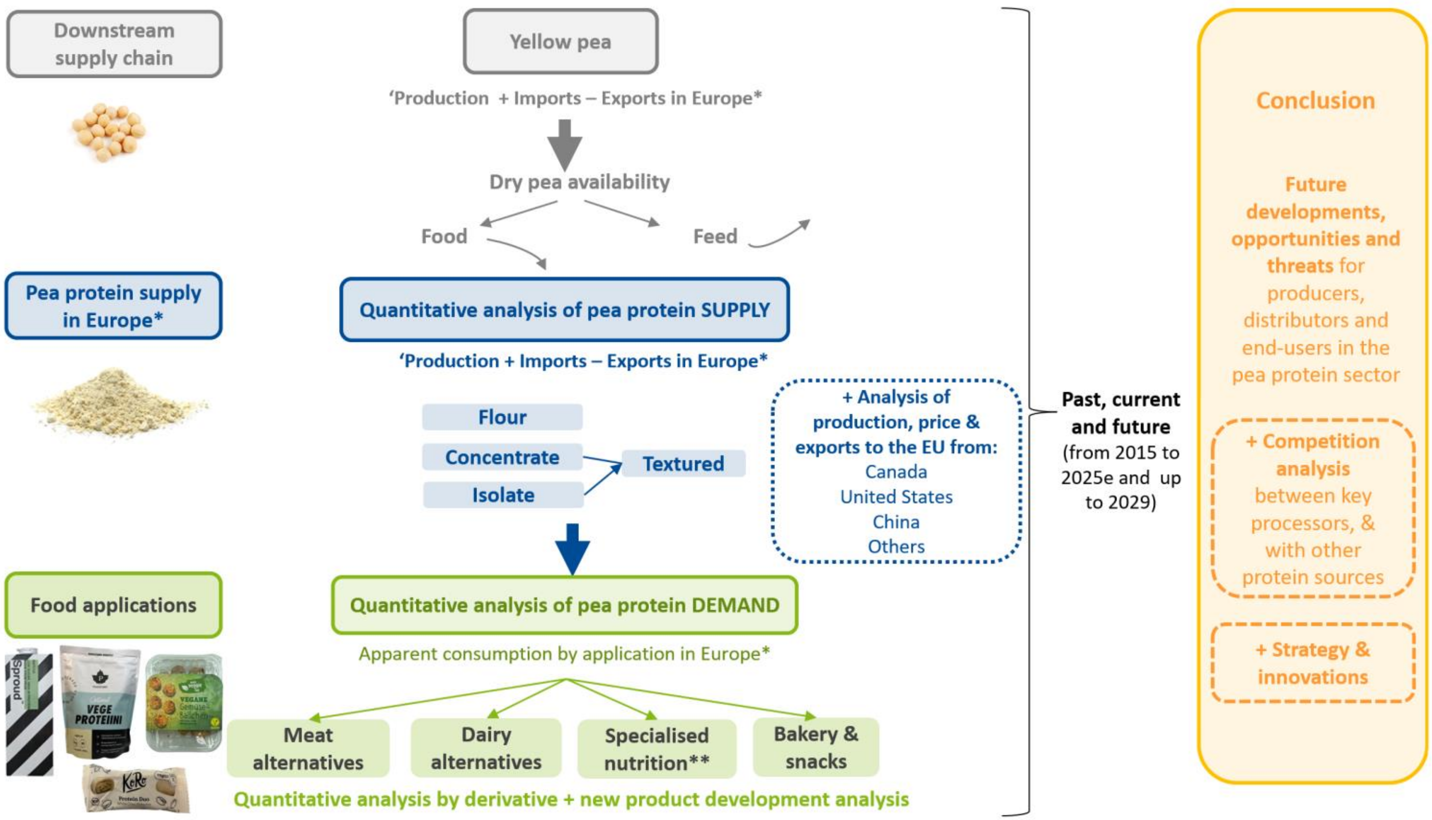
This study aims to quantify the supply, demand, and projected growth of pea protein (yellow pea) and its derivatives in the food industry in selected European countries. The report will be composed of several chapters, in order to gain a comprehensive outlook of the yellow pea protein market:

- Supply chain characteristics, with estimates of future production potential of pea.
- Supply analysis of pea protein derivatives (concentrates, isolates, TVP and flour), and future growth estimates.
- Use of pea protein by key food applications, with identification of growth opportunities and new product development.
- Competitive landscape for key processors.

Our analysis covers **the EU-27 (as a whole) with details on 6 countries** to ensure strong analytical depth within a targeted geographic scope.

- We focus on six leading European markets - France, Germany, Italy, Spain, the Netherlands, and the United Kingdom - recognised for their strong role in pea protein production, consumption, and trade, as well as for offering transparent, reliable data to support solid insights.

Coverage summary: from production to end-user demand specifications



Map of the European Union + UK

**Europe: Gira will cover the key European markets with details: FR, DE, UK, IT, NL, SP (shorter insights for other countries, like BE, for example)*

***Specialised nutrition: sport nutrition mainly (bars, powder, RTD), as well as infant, medical and senior nutrition*

Examples of Applications and Products Covered in Our Study

Pea protein inclusion varies from 0.5% to 50%!

Meat alternatives

Dairy alternatives

Beverages

Yogurts

Cheese

Ice-cream

Bakery products

Baking ingredients and mixes

Bread & bread products

Cakes, pastries & sweet goods

Savoury biscuits/ crackers

Sweet biscuits/ crackers

Snacks

Specialised nutrition

Sport nutrition (bars, beverages, powder)

Medical & senior nutrition

Infant nutrition (> 1 year-old)

The 'Pea Protein in Europe' Study at a Glance

Boost your strategy with supply & demand data

WHO is it for?

Protein manufacturers
→ View the competitive landscape, pricing dynamics, demand forecasts

Distributors and **traders**
→ Understand competition, price evolution, supplier mapping, product differentiation, etc.

End users (food manufacturers)
→ Understand application potential, price evolution, future markets and suppliers

WHY act now?

Understanding the supply and demand landscape today is essential to securing market share tomorrow.

1) **Growing demand**: continuous expansion of products containing pea proteins in the EU-27 and at global level.

- Despite some category turbulence (example: plant-based meat market slowdown), overall demand for pea proteins remains strong. During the first semester of 2025, we observed notable growth in product launches in the **bakery** and **mainstream food** segments, resulting in a diversification of the use of pea proteins in food.
- **Evolving end-user requirements -** not only in protein content, but also in application-specific performance and sensory attributes.
- The market is moving toward **next-generation pea protein offerings** that deliver cleaner taste, higher purity, enhanced functionality, and stronger sustainability claims.

2) **Supply restructuring in Europe**: how to win in this market.

- The **rapid influx of new pea suppliers across Europe** is reshaping the market. To stay competitive, producers, distributors, and formulators must clearly understand how competitors differentiate (on volume, functionality, price, innovation, etc.) → Understanding the supply chain and competitive landscape are key.
- **Asian and American imports vs domestic supply** reshapes cost structures: keep your edge! How to face competition from foreign countries.
- How can producers of pea protein derivatives add value to their business model? How can they strengthen their competitive advantage?
- Pea protein suppliers' success will depend on **strategic positioning**, not just capacity.

WHAT do you get?

→ Tailored **presentation** + **report of more than 130 pages** detailing supply and demand evolution (by protein type and by application) ... always with the key questions "what about the future?" and "so what are the industrial opportunities"?

- ☑ **Supply chain breakdown** — From dry peas to isolates, concentrates, textured proteins and peptones.
- ☑ **Demand outlook by application** — Meat alternatives, dairy, bakery, snacks, specialised nutrition.
- ☑ **Ingredient positioning** – From nutrition & functionality benchmark, to production volume evolution by country.
- ☑ **Pricing benchmarks** — Europe vs China vs North America.
- ☑ **Manufacturer positioning** — Who leads in volume? Where are the innovations?
- ☑ **Winning strategy** — Growth levers & threats for 2024–2029.

And much more!

© Gira 2025

Report Content

Report Content

6 chapters, containing over 130 pages of detailed insights and Gira forecasts

(Details in following pages)

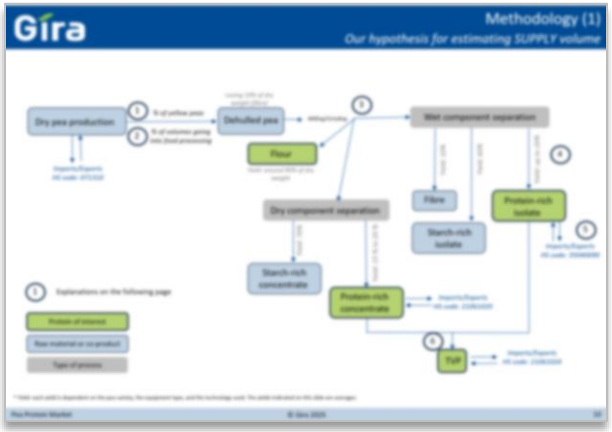
1- Study Objectives & Methodology

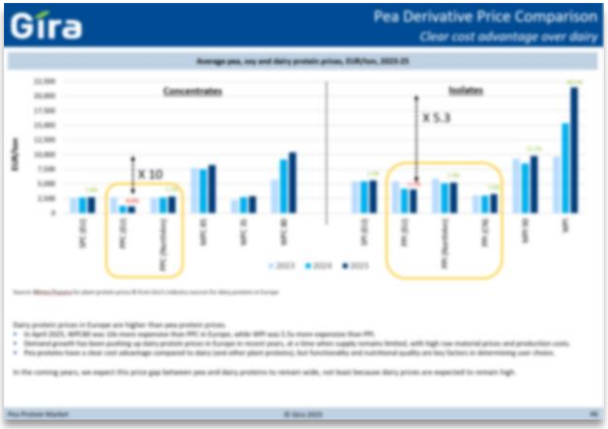
1. **Objectives: global protein market & consumer demand**
    - Introduction to our project coverage (in terms of geography and products).
2. **Our methodology for calculating supply & demand volumes**
    - Description of both top-down and bottom-up approaches, including all underlying hypotheses and the rationale for their selection.
    - Table with pea protein inclusion rate averages in a wide range of products, coupled with protein type.
3. **EU-27+UK macroeconomics**
    - Assessing the impact of future economic trends, demographic shifts, and regulatory changes on the European plant protein market.
    - Overview of animal protein consumption in Europe, and CAP reform.

2- Pea Protein Characteristics

1. **Process & technological developments**
    - Current process and future opportunities covering pea flours, isolates, concentrates, hydrolysates and textured.
    - Sustainability assessment and comparison with other protein sources.
    - By-product valorisation, and processing costs.
2. **Nutritional profiles & functionalities**
    - Pea nutritional composition, and comparison with other protein sources (in terms of DIAAS, EAA, digestibility, anti-nutrients, etc.), with multiple examples of optimal protein blends.
    - Functionality comparison between pea derivatives (isolates, concentrates, hydrolysates, texturates), as well as with dairy proteins (MPI, WMC, WMP, etc.) and soy proteins (isolates and concentrates).
    - Focus on albumin and globulin fraction developments, and comparison with dairy fractions.
3. **Pea protein price evolution**
    - Dry pea price evolution in Europe (whether for feed or food). Price details for pea protein concentrates, isolates, and texturates (dates: 2022-August 2025).
    - Comparison between pea and soy protein derivatives, in Europe, China and the US (2022-August 2025).
    - Comparison with dairy protein price evolution (2023-2025).

Examples from the report:





3- Supply: Pea Protein Supply and Trade

1. **Dry pea: supply, trade & consumption**
   - Global dry pea production volumes, and our forecast (covering Russia, Canada, China, India, the US, and the EU) (2015-2024).
   - Details of key European producing countries: France, Germany, Spain, the UK, Lithuania, etc. (2015-2029f).
   - Organic production: current and future development in Europe (and prices in France).
   - Dry pea import and export details in Europe (intra- and extra-EU trade) (2020-2025).
   - Apparent consumption details of dry peas within key countries worldwide, and in the EU-27+UK (showcasing for each country the calculations with production, imports and exports).
   - Per capita consumption of dry pea in the EU-27+UK (2015-2024).
2. **Pea protein derivatives: supply, trade & consumption**
   - Pea protein concentrate and texturate imports and exports (intra- and extra-EU trade): volume and trade prices, by supplier and destination (2020-2025).
   - Pea protein isolate and peptone imports and exports (intra- and extra-EU trade): volume and trade prices, by supplier and destination (2020-2025).
   - International trade issues and their impact on the European market between 2024 and 2025.
   - Trade summary of pea protein derivatives within the EU-27.
   - Apparent consumption of pea protein concentrates and isolates within the UK, Germany, France, Italy, Spain and the Netherlands.

4- Key End-User Segments & Demand Evolution

- Evolution of new product development, worldwide and in the EU-27+UK, by key applications (2015-2025).

1. **Meat alternatives**
   - European plant-based meat market update, latest retail sales growth, key drivers and brakes.
   - New product development analysis by European country (2015-2025).
   - Use of pea protein in meat alternative products (functionalities, incorporation rates, competition with other proteins - such as soy, wheat proteins and upcoming biotechnologies).
   - Example of Beyond Meat development and its competitive factors.
   - End-product price evolution.
   - Inclusion rates of pea protein concentrates, isolates and TVPs within recipes.
   - Pea protein volumes consumed by type and by country (for the 6 selected European countries), with growth rates (2024-2029f).

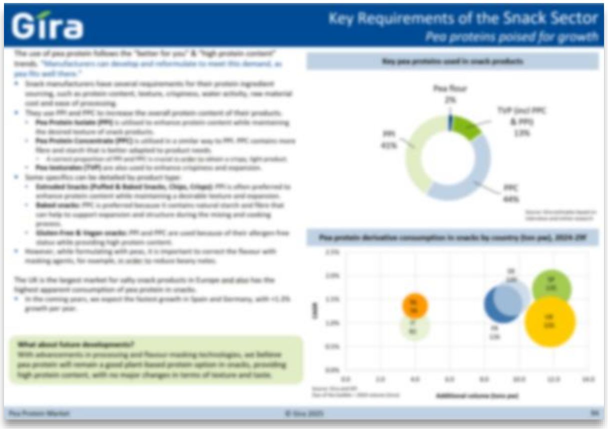
Examples from the report:

© Gira 2025

Detailed Report Content (3/4)

2. **Dairy alternatives**
   - Key products of focus: plant-based beverages, cheese, ice-cream and yogurts.
   - Dairy alternative market update in Europe (global volumes, future growth and market insights) for each product category.
   - New product development analysis by European country (2015-2025).
   - Pea protein use within dairy alternative products (key characteristics and functionalities required, incorporation rates, competition with other protein sources - such as dairy proteins, other plant proteins and upcoming biotechnologies).
   - Inclusion rates of pea protein concentrates, isolates and TVPs within recipes.
   - Pea protein volumes consumed by type and country, with growth rates (2024-2029f).
3. **Bakery products**
   - Global bakery consumption volume update of fresh and packaged goods (breads, viennoiserie, patisserie, and savoury pastries) (2023-2028f).
   - Consumption volume details by country, covering packaged bread, packaged pastries, sweet biscuits, dessert mixes, savoury biscuits and crackers (2024-2029f). Market insights with consumer trends.
   - New product development analysis by European country (2015-2025).
   - Key requirements for the bakery sector: protein functionalities, nutrition, blends, etc.
   - Inclusion rates of pea protein concentrates, isolates and TVPs within recipes.
   - Pea protein volumes consumed by type and country, with growth rates (2024-2029f).
   - Pea proteins as egg substitutes: key functionality requirements and competition analysis with other sources.
4. **Snacks**
   - European market update, focus on salty snacks (such as potato chips, tortilla chips, puffed snacks, rice snacks and vegetable/pulse bread chips). Current and future market trends in Europe.
   - New product development analysis by European country (2015-2025).
   - Inclusion rates of pea protein concentrates, isolates and TVPs within recipes.
   - Pea protein volumes consumed by type and country, with growth rates (2024-2029f).
5. **Specialised nutrition**
   - Key protein characteristics required by application: adult, sport, infant, medical and senior nutrition.
   - NPD analysis by European country (2015-2025) for each application.
   - Focus on **adult nutrition**: market update, type of dairy protein consumed, product and consumer trends.
   - Focus on **sport nutrition**: consumption volume of protein bars, powders and RTD by country (2024-2029f), type of dairy protein usually consumed, market forecasts, impact of GLP-1 & high-protein trends, pea protein volumes consumed by type and country, with growth rates (2024-2029f).
   - Focus on **infant formula** and **baby foods**: global consumption volume and market specifics, plant-based market developments and key manufacturers.
   - Focus on **medical** and **senior nutrition**: global market update, main dairy proteins used, key protein characteristics required, plant-based market update, and future evolution.

Examples from the report:



4- Key End-User Segments & Demand Evolution (continued)

6. **Conclusion on pea protein demand**
    - Volumes of pea protein consumed by application in the selected European countries (2024-29f).
    - Detailed volumes of pea protein (details by concentrates, isolates, TVPs, hydrolysates) consumed within the 6 selected European countries (2024-29f).
    - Consumption split by application for each pea derivative in Europe.
    - Summary of protein manufacturers' opportunities and threats, as well as volumes consumed by application in Europe, for each pea protein derivative (concentrates, isolates, TVPs, hydrolysates).

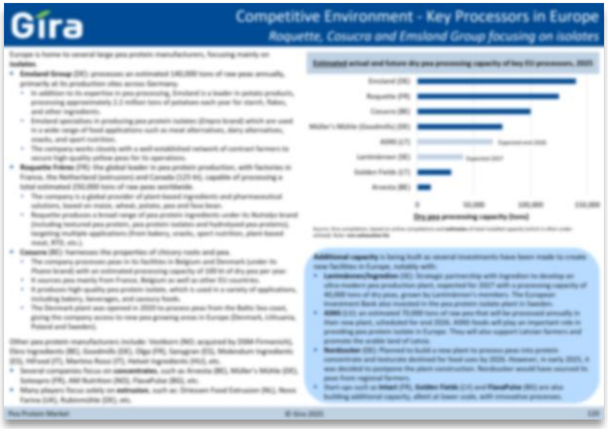
5- Competitive Landscape

1. **Key pea protein processors**
    - Global competitive environment dynamics in Europe and worldwide.
    - Focus on key processors in Europe: description and key dry pea processing capacity, insights into future additional capacity.
    - Focus on key processors in North America: description and key dry pea processing capacity, insights into future additional capacity.
    - Focus on key processors in Asia (mainly China): description and key dry pea processing capacity, insights into future additional capacity.
    - Extent of companies' integration.
    - Start-ups and production innovation: dynamics of the EU pea protein manufacturer landscape.
    - Key partnerships for developing production and our analysis for the future.
2. **Arrival of novel protein sources**
    - Focus on competition with precision fermentation, cultivated meat, insects, and mycoprotein (details of regulations, start-up advancement and ingredients of focus).

6- Conclusion

- Key pea protein derivatives volumes by application and selected European countries.
- Results comparison between our two methods for calculating pea protein derivative consumption by country.
- Opportunities and threats through the supply chain: seed genetics, farming, protein extraction, and end-product manufacturers.

Examples from the report:



Deliverables, Methodology and Costs

Deliverables and Methodology

Deliverables

The results of the study will be delivered through a written report and a presentation of key findings.

Written report:

- The written report will be published in PowerPoint 'report format' in English (similar to the style of this proposal).

Presentation of key findings:

- This will include a presentation of the key findings and a robust Q&A session.
- The date for the presentation will be agreed upon with the client after completion of the study, within a six-month timeframe.
- The session will last around one hour and will be carried out remotely via MS Teams.
- An in-person meeting can be arranged upon request, subject to the availability of both the client and the Gira team. Travel expenses will be invoiced at cost.

Methodology

We have used our tried-and-tested combination of three primary research methodologies to ensure the broadest possible coverage of the key aspects necessary to identify the market drivers to be analysed and forecast:

1) Desk research: detailed examination of existing market and infrastructure reports, as well as data on the plant-protein supply chain.
   - Including competitor reports and websites, trade press, corporate websites, retailers and associations, various consumer and sector studies, etc.
   - Access to various databases: Gira's own data, Mintel GNPD, Trade Map, and Global Trade Tracker.

2) Interview programme: more than 30 interviews with key players involved in the plant-protein ingredients supply chain across the main producing and consuming countries, to understand the current and medium-term structural evolution within the sector.
   - Interviews were carried out by Gira's experienced interview team using tailored questionnaires to gather the required answers for each product and market, taking into account the specifics of each country. Our interviewers essentially focused on:
     - Producing companies.
     - Industrial plant-protein users across various types of applications.
     - Associations, authorities and experts.

3) Analysis and interpretation
   - Gira has combined both qualitative and quantitative insights to build an image of the potential size and sophistication of the evolving global market.
   - Additionally, a qualitative analysis, coupled with an analysis of opportunities and threats within the sector, has been carried out to answer key points:
     - What major needs are currently not met by suppliers?
     - What do suppliers already do well, where can they develop, what lessons can they learn from competitors, and why?

Our company

Over the last **30 years,** Gira has built up a major reputation and client base in the **international dairy, meat and bakery sectors**. Over the last four years, Gira has also been **active in the ‘alternatives to dairy and meat’ sectors**, through several presentations and webinars, as well as two editions of the Gira Ingredients Club.

- Gira is recognised for its **worldwide expertise**, **strategy consulting** and **market research** in ingredients, meat, dairy, bakery and foodservice, with specialist experience in all other food and drink areas (more details are available at www.girafood.com).

- In recent years, we have carried out many assignments (such as individual and multiclient studies) for worldwide ingredients companies.
  - We have delivered tailored solutions for companies harnessing innovative ingredients from dairy, plant, and bioengineered sources.
  - Every year Gira updates its **Technical Dairy Ingredients report** (included in the Gira Dairy Club package).

- Our extensive **network of international experts, contacts and clients** in most dairy, meat, bakery and plant-based sectors means that we are qualified to carry out this research and analysis project. Experience has also shown that our **longstanding reputation** for research and consultancy in the global market opens doors for us to the most informed and competent sources of information.

The Gira team

Christophe Lafougère is **CEO** of Gira, and directly responsible for all Gira assignments in the worldwide dairy sector. He has been directing all Gira's consulting and research activities in the dairy sector for over 30 years covering all aspects of production, collection, processing and marketing, in all the major dairy-producing and consuming regions of the world.

Mylène Potier is Director of Ingredients at Gira, and project manager for this study. She has a PhD in Human Nutrition with particular reference to milk proteins. She is responsible for all studies and research on technical ingredients at Gira. She supervises a team of consultants with experience gained over many years, from individual and multiclient studies in the dairy and ingredients sectors.

Laurène Bajard, a consultant with Gira for the last six years, has a strong understanding of the food industry, from production to marketing. She specialises in dairy and plant-based product trends, as well as South American markets. Currently working on the evolution of dairy and meat alternatives markets, she focuses on innovations, strategies and investments in this sector.

Guy Kientz, is a Senior Advisor with Gira. He has held several senior management positions in the food ingredients industry, including dairy, in various companies in Europe, the United States and Asia Pacific over the last 30 years. He brings his expertise in strategic consulting, project management and M&A.

Timing

The report was published in **October 2025**.

Subscription

The subscription for the complete study costs **9,500 EUR** (before any applicable taxes).

The price includes:
- The full report “*Yellow Pea: the Trending Protein. The European Perspective*” (134 pages).
- Individual presentation with your team on MS Teams (1 hour with Q&A).

Special discount:

- This Yellow Pea Protein study is part of a broader series of Gira studies that will also include soy and wheat proteins (with similar report structures).
  - Clients who purchase the combined studies of pea + soy + wheat will receive a 20% discount on the package of three studies.
  - Clients who purchase either the pea + soy or pea + wheat studies will receive a 15% discount on the package of two studies.

- Members of the Gira Dairy Club, Gira Ingredients Club or Gira Meat Club will benefit from a special discounted rate of 15% on the Yellow Pea Protein study.

© Gira 2025

Selection of Gira's Clients

From across the food chain and associated sectors

AB-Mauri
Abbott Laboratories
ABF
ABIEC
ABP
Adisseo
Agropur Dairy Cooperative
Agrial (Eurial)
AHDB
Albert Handtmann
Arla Foods
Aryzta
Aviagen
Bimbo
Biomérieux
Bord Bia
Bunge
Cargill
Ceres
Clasado Biosciences
CNIEL
Cobb
Comital
CP Foods
CSM Ingredients
Danish Crown
Dantrade (Danone)
Depthfield GmbH
DMK
dsm-firmenich
Emmi
European Commission
Eucolait
Eurial Ingredients & Nutrition
Euroserum
Fedegan
Ferrero
FIT SA
Fonterra Cooperative Group
Friesland Campina
GEA
Groupe Bel
HK Scan
Hilton Food Group
IFC
IFF
IMS (Intl Meat Secretariat)
Inalpi Spa
Ingredion
Interbev
JAPFA
JBS
Kemin
Kerry
Lactalis Ingredients
Laïta
Laiterie des Ardennes
Landbrug & Fødevarer
Land O'Lakes
Lantmännen Unibake
Lesaffre
LLI Goodmills
LMC
Mane
Mondelez
Meggle Group
Mercurius Production
Mueller
Multivac
Nestlé
Neste
Novonesis
Nutreco
Paccor
Puratos
Rabobank
Roquette Frères
Royal Agrifirm
Rupp
Sainsbury's
Saputo Dairy UK
Sealed Air
Sodiaal
Standing Ovation
TetraPak
Tirlán
Tyson Foods
Unigrains
Upfield
US Dairy Export Council
USMEF
Valio
Verley
Vion
Virbac
Yili

Contacts

Christophe Lafougère

c.lafougere@girafood.com

Laurène Bajard

l.bajard@girafood.com

Mylène Potier

mpotier@girafood.com

Guy Kientz

gkientz@girafood.com

+33 4 50 40 24 00 contact@girafood.com www.girafood.com