

The Plant Protein Landscape

With consumer demand for plant-based products continuing to grow rapidly, a broad portfolio of plant proteins is available for plant-based meat, egg, and dairy products. To meet requirements ranging from consumer sensory preferences to nutrition, functionality, price, availability, and sourcing, manufacturers should consider what different plant protein sources have to offer.

QUICK FACTS: PLANT PROTEIN BASICS

Proteins are made up of different combinations of amino acids. Based on their compositions, proteins have various sizes, shapes, functions, and applications in food. Commercial proteins are often extracted to improve their properties. Extraction methods can influence **protein types** recovered, **properties**, and **yield**. Processing can also influence protein functionality via denaturation, hydrolysis, modification, and cross-linking.

Protein content in a **concentrate** is 40%-60% on a dry matter basis, compared to 80%+ for an **isolate**.

CHOICE PARAMETERS

There are many considerations when choosing the optimum plant protein ingredient, including:

- | | | |
|---|--|--|
|  Protein content & quality |  Historical use |  Functionality |
|  Nutrition & claims |  Certifications |  Familiarity with use |
|  Allergenicity, intolerance |  Availability |  Cost |
|  Consumer perception |  Safety |  Aroma, flavor, texture, mouthfeel, color |
|  Source (geographic, commercial) |  Regulatory | |

PLANT PROTEIN BENCHMARKING SUMMARY

The below table benchmarks widely available plant protein sources on **protein concentration**, protein digestibility-corrected amino acid score (**PDCAAS**), **allergen risk**, **commercial stage**, **flavor**, **functionality**, **cost**, and **global crop volume**. Major crops soy, pea, and wheat are followed by sources organized by protein type (legume/pulse/oilseed; vegetables/fruit/nut/cereal).¹

	Protein Concentration	PDCAAS	Allergen Risk	Commercial Stage	Flavor	Functionality	Cost (/kg protein)	Global Crop Volume (MMT)
● Excellent	>30%	>0.8	Usually mild, low pop.	Commodity	Flavorless	Low conc. effect	<\$2	>100
● Good	20-30%	0.6-0.79	↕	Large	↕	↕	\$2-4	10-99
● OK	10-20%	0.40-0.59	↕	Small	Acceptable	↕	\$5-9	1-9
● Low	5-10%	0.20-0.39	↕	Start-up	↕	↕	\$10-19	0.1-0.9
● Poor	<5%	<0.20	Severe in sig. pop.	R&D	Objectionable	Water insoluble	>\$20	<0.1

Protein	Protein Concentration	PDCAAS	Allergen Risk	Commercial Stage	Flavor	Functionality	Cost (/kg protein)	Global Crop Volume (MMT)
Soy	●	●	●	●	●	●	●	●
Pea	●	●	●	●	●	●	●	●
Wheat	●	●	●	●	●	●	●	●
Canola	●	●	●	●	●	●	●	●
Chickpea	●	●	●	●	●	●	●	●
Fava Bean	●	●	●	●	●	●	●	●
Lentil	●	●	●	●	●	●	●	●
Lupin	●	●	●	●	●	●	●	●
Mung Bean	●	●	●	●	●	●	●	●
Navy Bean	●	●	●	●	●	●	●	●
Peanut	●	●	●	●	●	●	●	●
Sunflower	●	●	●	●	●	●	●	●
Almond	●	●	●	●	●	●	●	●
Corn	●	●	●	●	●	●	●	●
Oat	●	●	●	●	●	●	●	●
Potato	●	●	●	●	●	●	●	●
Quinoa	●	●	●	●	●	●	●	●
Rice	●	●	●	●	●	●	●	●
Sorghum	●	●	●	●	●	●	●	●

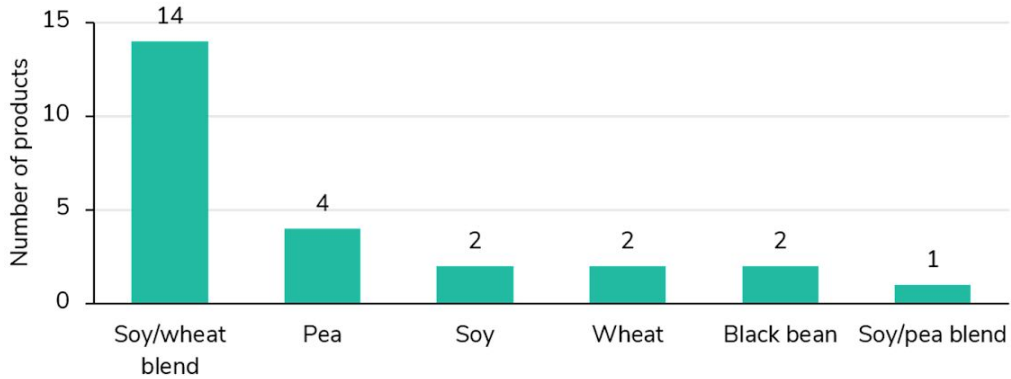
POPULAR PLANT PROTEINS

Due to abundant supply, low price, and functionality, soy, wheat, and pea are the most common plant protein sources in top products in the U.S. market. Soy or a blend with soy is the protein base in 17 of the top 25 plant-based meat products by dollar sales.²

¹Note: For some plants, certain metrics are not available

²This data is based on custom-GFI plant-based categories that were created by refining standard SPINS categories. Due to the custom nature of these categories, the presented data will not align with standard SPINS categories. Source: SPINScan Natural and Specialty Gourmet (proprietary), SPINScan Conventional Multi Outlet (powered by IRI), 52 weeks ending 12-29-2019

Plant-protein base of top 25 plant-based meat products by dollar sales 2019



Of the top 25 plant-based meat products, dollar sales of the four pea-based products collectively grew at 339% over 2019, while sales of the twenty one other products grew less quickly, at 2%.

EMERGING PLANT PROTEINS

Emerging plant proteins require a competitive value proposition to bring about growth. To compete directly with wheat and soy, one major consideration is how well they texturize. In the below chart, we highlight the characteristics of several plant proteins with significant growth potential.

Protein	Protein Concentration	PDCAAS	Allergen Risk	Commercial Stage	Flavor	Functionality	Cost (/kg protein)	Global Crop Volume (MMT)
Sunflower	●	●	●	●	●	●	●	●
→ Potential to be cost effective (byproduct of 3 rd biggest oilseed). Needs scale-up & commercial development.								
Mung Bean	●	●	●	●	●	●	●	●
→ Scale-up needed for cost improvement. Excellent properties & starch byproduct used for noodles & other foods.								
Potato	●	●	●	●	●	●	●	●
Rice	●	●	●	●	●	●	●	●
→ Attractive attributes. Volume can expand until available precursor from starch processing is consumed.								
Duck Weed	●	●	●	●	●	●	●	●
→ Sustainable, excellent properties. Needs scaling and commercial development to increase volume & decrease cost.								
Chickpea	●	●	●	●	●	●	●	●
Navy Bean	●	●	●	●	●	●	●	●
Oat	●	●	●	●	●	●	●	●
→ Great potential if byproduct utilization (starch) is improved.								

Additional emerging protein sources include:

- Bambara Bean Duckweed Lima Beans Pigeon Pea Spirulina
- Beach Pea Dulse Mesquite Bean Pongamia Watermelon Seed
- Camelina Flax Millet Potato Bean Wheat Grass
- Cashew Nut Hemp Mucuna Bean Pumpkin Seed Yam Bean
- Chia Jackfruit Pennycress Sesame Yeast

