EUVEPRO

Market, Regulatory & Policy Update for Plant-based Ingredients

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European Vegetable Protein Association

EUVEPRO

OUTLINE

I. Introducing EUVEPRO

II. The market for plant-based proteins : a 10-year historic review

III. Regulatory & Policy update

I. Introducing EUVEPRO

- **EUVEPRO =** European Vegetable Protein Association, representing the interest sof the producers of functional plant protein ingredients in foods

- **Founded in 1977**

- **Membership: open to**
  - ✓ company membership (manufacturers and distributers)
  - ✓ National associations and research bodies

- **today** five full members: ADM, ROQUETTE, COSUCRA, BENEO, DuPont, and one associated member GEPV (Groupe d'Etude et de Promotion des Protéines Végétales)

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I. Introducing EUVEPRO

Mission:

"EUVEPRO promotes the recognition of vegetable protein products as foodstuffs and ingredients in their own right forming part of the normal diet of EU consumers"

ADM

beneo connecting nutrition and health

cosucra Groupe Warcoing

DUPONT

GEPV

ROQUETTE Offering the best of nature™

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I. Introducing EUVEPRO

Aims, Objectives & Actions

- **REPRESENT** industry interests towards the European Institutions, National Authorities and International Organisations (Codex, FAO)

- Examine existing and proposed **EU and worldwide REGULATIONS** impacting our industry and products and actively work towards a favourable regulatory environment and issue management.

- **PROMOTE** the awareness and acceptance of vegetable proteins in the human diet.

- Develop effective external relationships and **NETWORK** with other players in the food and ingredients space.

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I. Introducing EUVEPRO

External Network:

Primary Food Processors

FFC
Food and Feed Coalition

FOODDRINK EUROPE

EUVEPRO

RTRS
Roundtable on Responsible Soy

ensa

EU specialty food ingredients
formerly ELC

SNE Specialised Nutrition Europe

II. The market for plant-based proteins

THE USE OF PLANT PROTEINS IN FOOD AND BEVERAGES IN THE EU : A 10-year historic review.

➔ In 2018 EUVEPRO commissioned a report analysing the development of uses of various plant proteins based on new product launches in food & beverages for the period 2007-2017.

INNOVA MARKET INSIGHTS

Methodology - ANALYSIS & PARAMETERS

- Analysis is performed based on new product launches tracked on the Innova Database.
- Geography: EU countries
- Time Frame: 2007 – 2017
- Category: Food & Beverages
- Abbreviations:
  - CAGR = Compound Annual Growth Rate
  - F&B = Food & Beverage
  - NPL = New Product Launches

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Methodology - SELECTED VEGETABLE PROTEINS

- **Wheat protein**: "wheat protein" "wheat gluten" "wheat protein isolate" "hydrolyzed wheat protein" "textured wheat protein" "Wheat Bran Protein"
- **Soy protein**: "Soy Protein" "Soy Protein Concentrate" "Soy Protein Hydrolysate" "Soy Protein Isolate" "Soy Protein Nuggets" "Soy Protein Textured"
- **Pea protein**: "Pea Protein" "Pea Protein Concentrate" "Pea Protein Hydrolysate" "Pea Protein Isolate" "Textured Pea Protein" "Rehydrated Pea Protein"
- **Rice protein**: "Rice Protein" "Rice Protein Concentrate" "Rice Protein Isolate" "Rice Bran Protein" "hydrolyzed rice protein"
- **Potato protein**:"Potato protein" "potato protein isolate" "hydrolyzed potato protein"
- **Other proteins**: "Almond Protein" "Amaranth Protein" "Broad Bean" "Fava Bean" "Faba Bean Concentrate" "Brown Rice Protein" "Buckwheat Protein" "Chia Protein" "Chia Seed Protein" "Chickpea Protein" "Corn Protein" "Flaxseed Protein" "Green Bean Protein" "Hydrolyzed Corn Protein" "Lupin Protein" "Mung Bean Protein" "Oat Protein" "Peanut Protein" "Pumpkin Seed Protein" "Quinoa Protein" "Sesame Protein" "Spelt Protein" "Spirulina Protein" "Tofu Protein" "Water Lentil Protein" "White Bean Protein" "Yellow Pea Protein" "Canola protein" "spelt protein" "Sacha Inchi protein" "lentils protein" "hemp protein" "sunflower protein" "barley protein" "rye protein" "guar protein" "vegetable protein"

INNOVA MARKET INSIGHTS

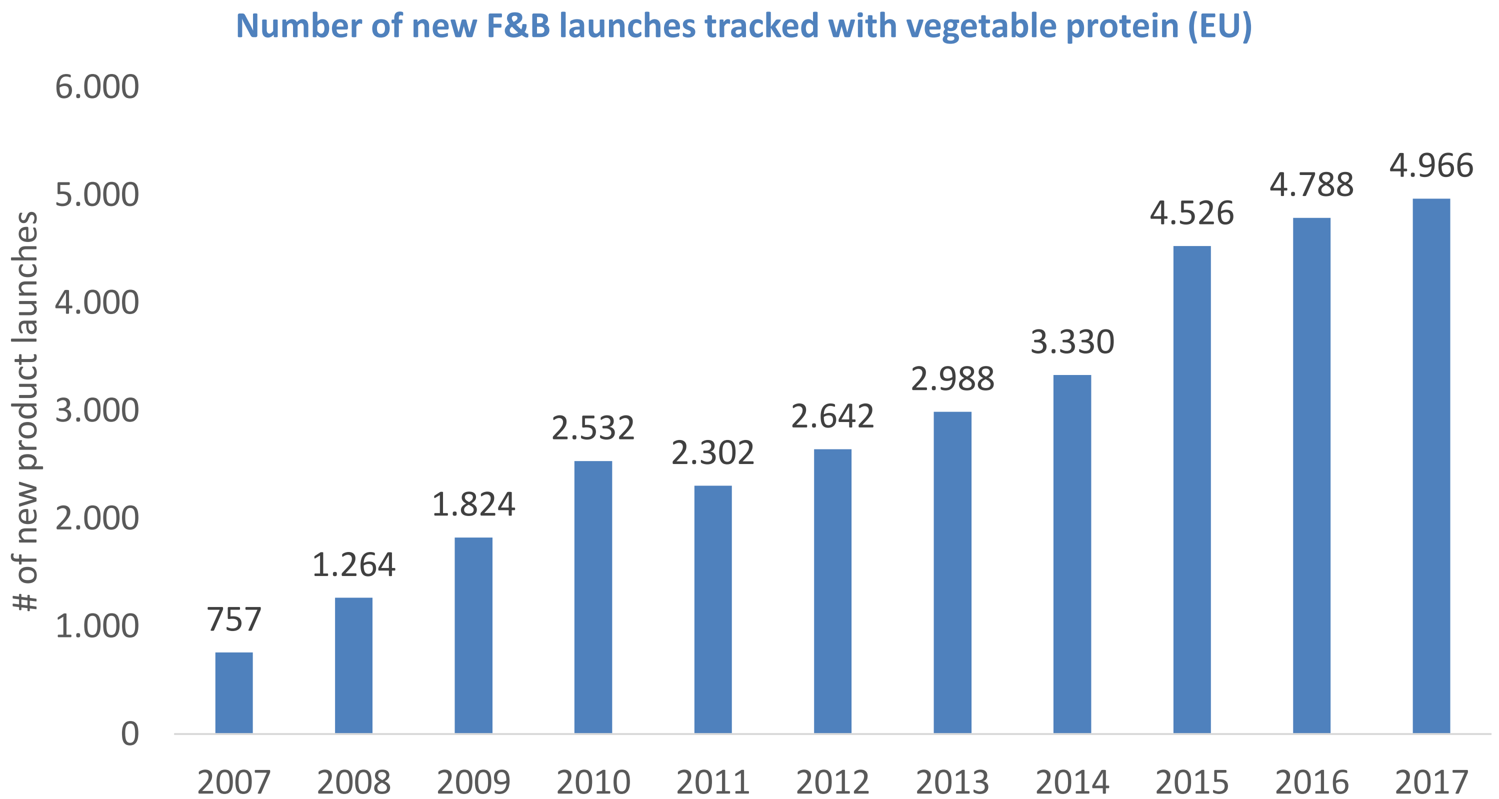
II. The market for plant-based proteins

THE USE OF PLANT PROTEINS IN FOOD AND BEVERAGES IN THE EU: A 10-year historic review

KEY FINDINGS

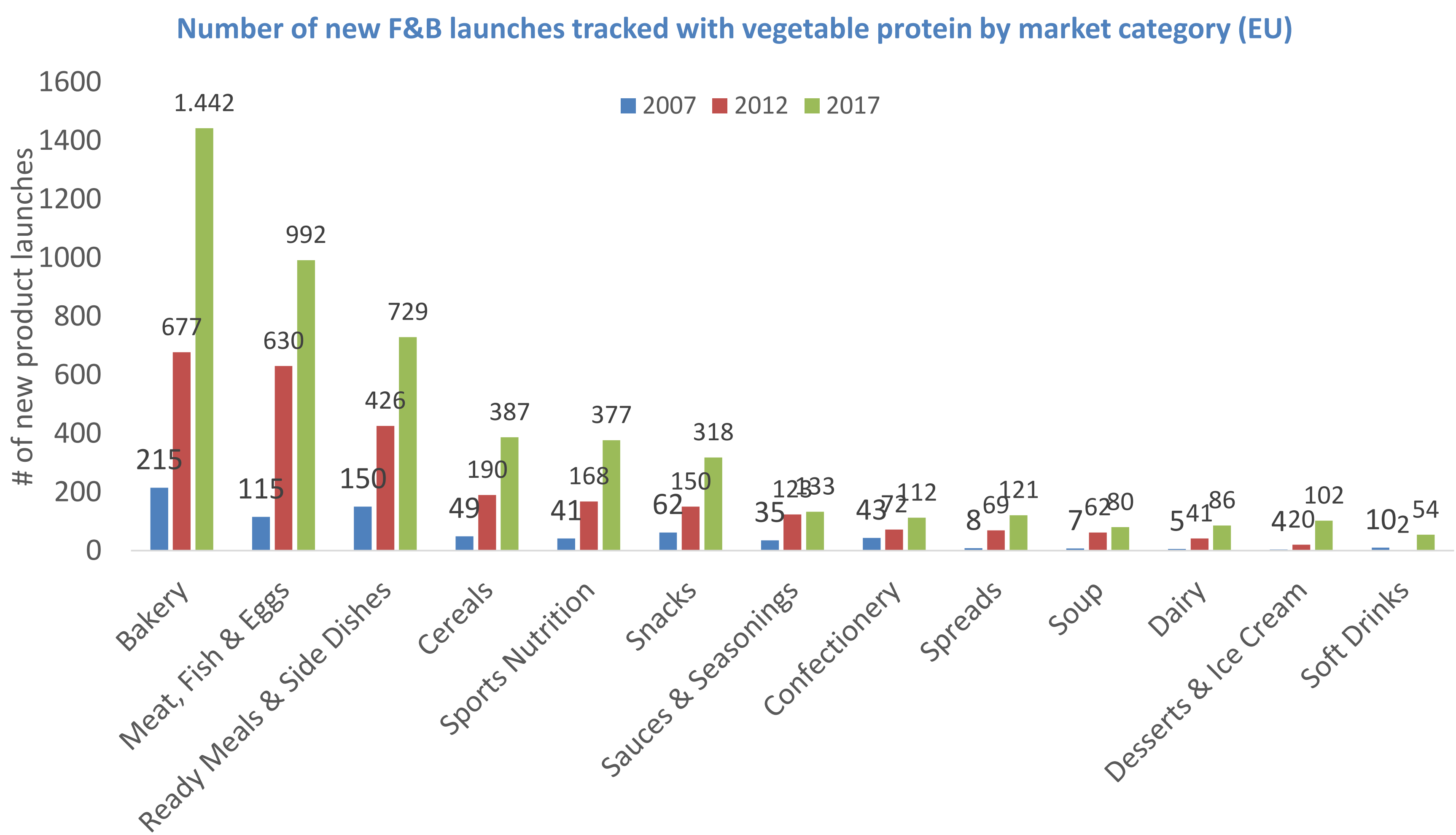
Total vegetable protein launches in Europe

+13.5% average annual growth of new F&B launches tracked in Europe with vegetable protein over the past five years (CAGR 2012-2017)



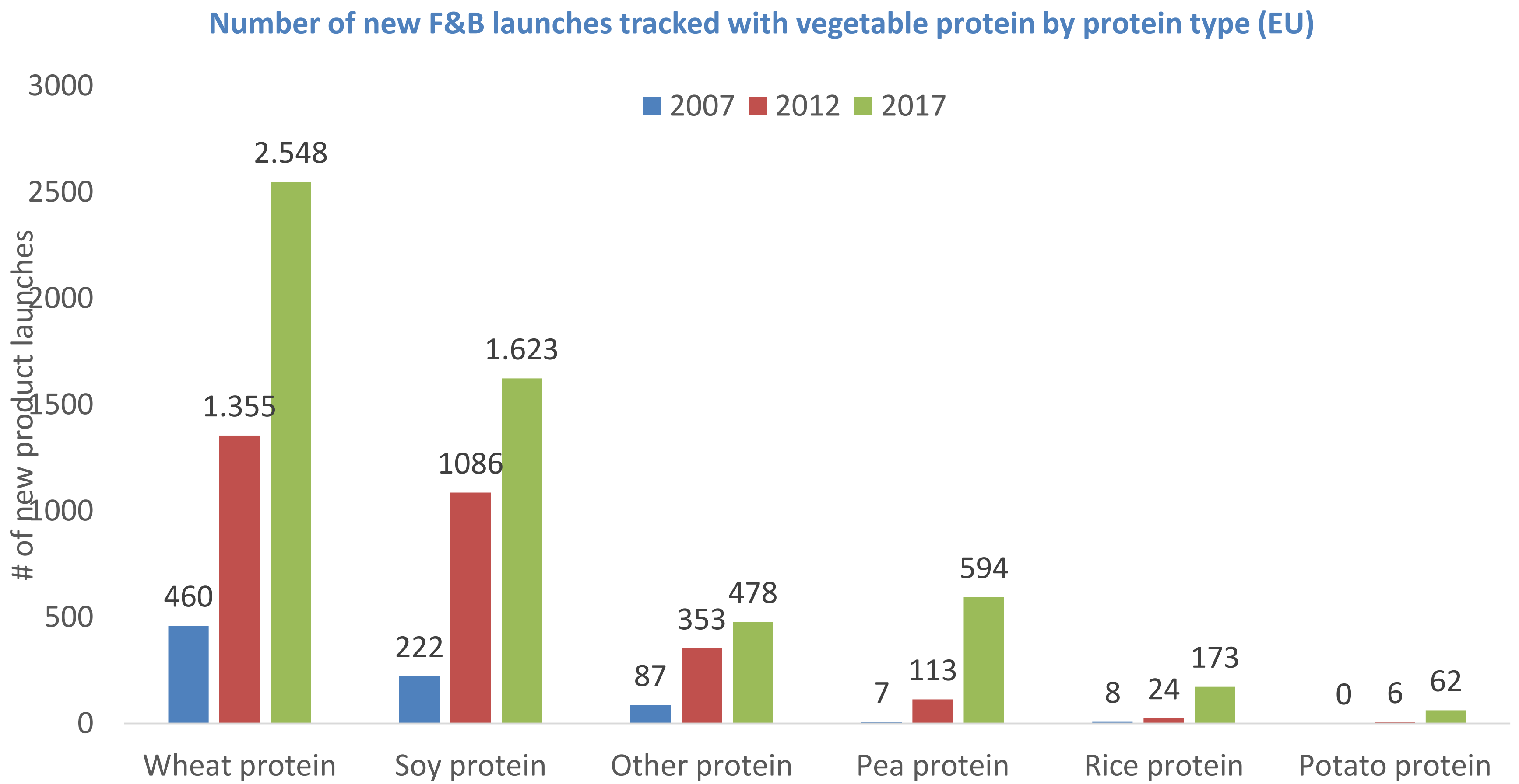
INNOVA MARKET INSIGHTS

Total vegetable protein launches by market category



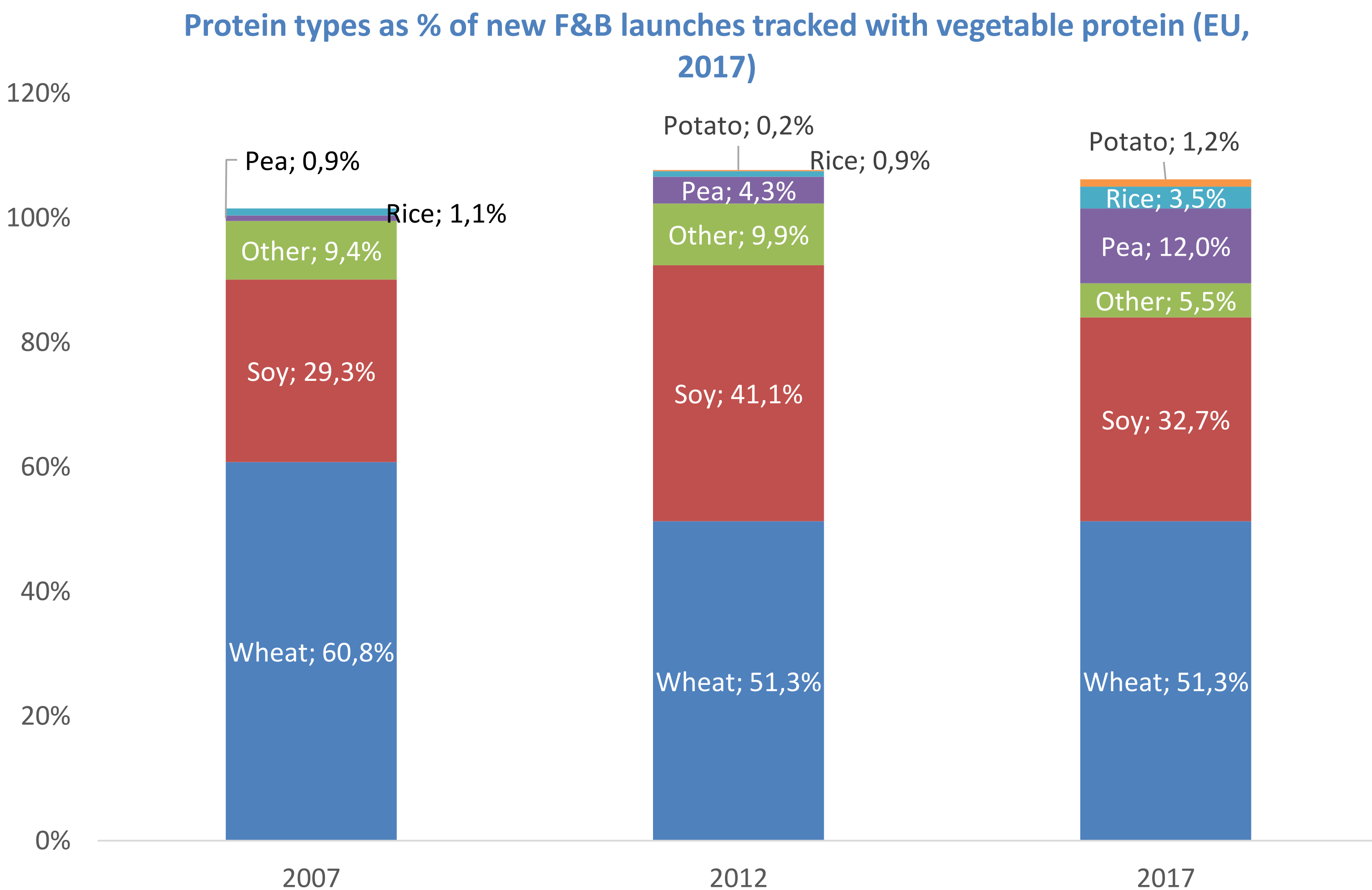
*CAGR, 2012-2017

Vegetable protein type distribution



*CAGR, 2012-2017

Total vegetable protein overview



*Percentages may be higher than 100% due to more than 1 protein type per product

Top & fastest growing countries and categories for vegetable protein

TOP

	Top countries/categories (in # of product launches tracked in 2017)	Total vegetable protein 2007	2012	2017	Growth (CAGR 2012-2017)
COUNTRIES	United Kingdom	205	661	944	+7.4%
	France	93	137	677	+37.6%
	Germany	86	267	594	+17.3%
	Netherlands	89	348	536	+9.0%
	Spain	43	200	510	+20.7%
CATEGORIES	Bakery	215	677	1,442	+16.3%
	Meat, Fish & Eggs	115	630	992	+9.5%
	Ready Meals	150	426	729	+11.3%
	Cereals	49	190	387	+15.3%
	Sports Nutrition	41	168	377	+17.5%

FASTEST GROWING

	Top fastest growing countries/ categories	Total vegetable protein 2007	2012	2017	Growth (CAGR 2012-2017)
COUNTRIES	Denmark	26	33	183	+40.9%
	Ireland	18	23	125	+40.3%
	France	93	137	677	+37.6%
	Croatia	-	5	16	+26.2%
	Italy	24	77	237	+25.2%
CATEGORIES	Soft Drinks	10	2	54	+93.3%
	Desserts & Ice Cream	4	20	102	+38.5%
	Baby & Toddlers	7	4	14	+28.5%
	Fruit & Vegetables	5	7	16	+18.0%
	Sports Nutrition	41	168	377	+17.5%

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II. The market for plant-based proteins

WHEAT PROTEIN
(including wheat gluten)

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Top & fastest growing countries and categories for wheat protein

TOP

	Top countries/categories (in # of product launches tracked in 2017)	Total wheat protein 2007	2012	2017	Growth (CAGR 2012-2017)
COUNTRIES	United Kingdom	145	416	515	+4.4%
	France	77	115	450	+31.4%
	Netherlands	45	141	298	+16.1%
	Germany	54	131	277	+16.2%
	Spain	14	81	210	+21.0%
CATEGORIES	Bakery	190	603	1,247	+15.6%
	Ready Meals & Side Dishes	94	174	416	+19.0%
	Meat, Fish & Eggs	41	213	409	+13.9%
	Snacks	21	43	136	+25.9%
	Cereals	37	138	120	-2.8%

FASTEST GROWING

Top fastest growing countries/ categories	Total wheat protein 2007	2012	2017	Growth (CAGR 2012-2017)
Denmark	13	14	69	+37.6%
France	77	115	450	+31.4%
Ireland	13	13	49	+30.4%
Bulgaria	3	5	17	+27.7%
Czech Republic	2	5	16	+26.2%
Snacks	21	43	136	+25.9%
Ready Meals & Side Dishes	94	174	416	+19.0%
Desserts & Ice Cream	2	11	25	+17.8%
Bakery	190	603	1,247	+15.6%
Meat, Fish & Eggs	41	213	409	+13.9%

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II. The market for plant-based proteins

SOY PROTEIN

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Top & fastest growing countries and categories for soy protein

TOP

Top countries/categories (in # of product launches tracked in 2017)		Total soy protein			
		2007	2012	2017	Growth (CAGR 2012-2017)
COUNTRIES	United Kingdom	48	203	275	6.3%
	Spain	19	88	261	24.3%
	Netherlands	33	178	203	2.7%
	Germany	21	97	156	10.0%
	France	11	21	121	41.9%
CATEGORIES	Meat, Fish & Eggs	64	419	525	4.6%
	Sports Nutrition	21	115	219	13.7%
	Ready Meals & Side Dishes	36	193	211	1.8%
	Cereals	9	60	180	24.6%
	Snacks	33	77	150	14.3%

FASTEST GROWING

Top fastest growing countries/ categories	Total soy protein			
	2007	2012	2017	Growth (CAGR 2012-2017)
Denmark	10	8	75	56.5%
Ireland	4	8	59	49.1%
France	11	21	121	41.9%
Italy	3	20	81	32.3%
Spain	19	88	261	24.3%
Soft Drinks	8	2	24	64.4%
Cereals	9	60	180	24.6%
Confectionery	6	9	18	14.9%
Desserts & Ice Cream	2	3	6	14.9%
Snacks	33	77	150	14.3%

II. The market for plant-based proteins

PEA PROTEIN

Top & fastest growing countries and categories for pea protein

TOP

Top countries/categories (in # of product launches tracked in 2017)	Total pea protein			
	2007	2012	2017	Growth (CAGR 2012-2017)
COUNTRIES				
United Kingdom	2	36	121	27.4%
Germany	-	7	103	71.2%
France	2	5	93	79.4%
Netherlands	1	24	44	12.9%
Finland	-	10	38	30.6%
CATEGORIES				
Bakery	-	19	111	42.3%
Meat, Fish & Eggs	4	24	94	31.4%
Sports Nutrition	-	14	89	44.8%
Ready Meals & Side Dishes	1	28	77	22.4%
Cereals	1	2	56	94.7%

FASTEST GROWING

Top fastest growing countries/ categories	Total pea protein			
	2007	2012	2017	Growth (CAGR 2012-2017)
Spain	-	1	26	91.9%
France	2	5	93	79.4%
Denmark	-	2	37	79.2%
Germany	-	7	103	71.2%
Sweden	-	3	36	64.4%
Cereals	1	2	56	94.7%
Dairy	-	1	26	91.9%
Confectionery	-	1	18	78.3%
Spreads	-	1	14	69.5%
Desserts & Ice Cream	-	6	50	52.8%

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II. The market for plant-based proteins

RICE PROTEIN

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Top & fastest growing countries and categories for rice protein

TOP

Top countries/categories (in # of product launches tracked in 2017)	Total rice protein			
	2007	2012	2017	Growth (CAGR 2012-2017)
COUNTRIES				
United Kingdom	2	12	62	+38.9%
France	0	1	28	+94.7%
Germany	0	5	26	+39.1%
Netherlands	2	0	10	N/A
Denmark	0	0	9	N/A
CATEGORIES				
Cereals	1	1	57	+124.5%
Sports Nutrition	0	20	54	+22.0%
Confectionery	1	0	16	N/A
Bakery	2	0	12	N/A
Soft Drinks	0	0	11	N/A

FASTEST GROWING

Top fastest growing countries/ categories	Total rice protein			
	2007	2012	2017	Growth (CAGR 2012-2017)
France	0	1	28	+94.7%
Belgium	0	1	7	+47.6%
Germany	0	5	26	+39.1%
United Kingdom	2	12	62	+38.9%
Spain	0	1	5	+38.0%
Cereals	1	1	57	+124.5%
Baby & Toddlers	2	1	6	+43.1%
Sports Nutrition	0	20	54	+22.0%
Snacks	2	2	4	+14.9%

II. The market for plant-based proteins

POTATO PROTEIN

Top & fastest growing countries and categories for potato protein

TOP

Top countries/categories (in # of product launches tracked in 2017)		Total potato protein			
		2007	2012	2017	Growth (CAGR 2012-2017)
COUNTRIES	Netherlands	-	1	23	+87.2%
	Germany	-	-	17	N/A
	United Kingdom	-	4	11	+22.4%
	Belgium	-	-	8	N/A
	France	-	-	5	N/A
CATEGORIES	Meat, Fish & Eggs	-	2	27	+68.3%
	Bakery	-	-	24	N/A
	Confectionery	-	-	12	N/A
	Ready Meals & Side Dishes	-	4	4	0.0%
	Dairy	-	-	2	N/A

FASTEST GROWING

Top fastest growing countries/ categories	Total potato protein			
	2007	2012	2017	Growth (CAGR 2012-2017)
Netherlands	-	1	23	+87.2%
United Kingdom	-	4	11	+22.4%
Finland	-	1	2	+14.9%
Meat, Fish & Eggs	-	2	27	+68.3%

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OTHER PROTEINS

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Top & fastest growing countries and categories for other protein

TOP

	Top countries/categories (in # of product launches tracked in 2017)	Total other protein			
		2007	2012	2017	Growth (CAGR 2012-2017)
COUNTRIES	Germany	16	58	84	7.7%
	United Kingdom	16	69	54	-4.8%
	Netherlands	14	54	55	0.4%
	Spain	10	40	45	2.4%
	Belgium	5	20	32	9.9%
CATEGORIES	Meat, Fish & Eggs	17	112	98	-2.6%
	Ready Meals & Side Dishes	28	72	94	5.5%
	Sauces & Seasonings	11	52	39	-5.6%
	Snacks	11	36	45	4.6%
	Bakery	10	35	47	6.1%

FASTEST GROWING

	Top fastest growing countries/ categories	Total other protein			
		2007	2012	2017	Growth (CAGR 2012-2017)
COUNTRIES	Portugal	-	3	16	39.8%
	France	3	10	42	33.2%
	Italy	3	6	17	23.2%
	Denmark	6	9	22	19.6%
	Belgium	5	20	32	9.9%
CATEGORIES	Soup	4	14	35	20.1%
	Spreads	-	8	22	22.4%
	Sports Nutrition	-	14	27	14.0%

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II. The market for plant-based proteins

INTERESTING TRENDS OBSERVED

- DIVERSIFICATION : new plant protein types as of 2007 and at an accelerated rate since 2015 besides Wheat and Soy Protein.

- Growing MEAT ANALOGUES introductions based on vegetable proteins in traditional meat-eating countries : Germany, France, Netherlands, UK.

- More launches in recent years featuring MULTIPLE plant proteins: e.g. SPORTS NUTRITION TRENDS FEATURING MULTIPLE VEGETABLE PROTEINS

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III. REGULATORY AND POLICY ISSUES

EUVEPRO's main focus is on regulatory issue management and fostering a favourable legal environment for the use of plant proteins in the human diet.

KEY ACCOMPLISHMENTS:

- CODEX Standards for Vegetable Protein Products, Soy Protein and Wheat Protein (including wheat gluten.
- Elimination of regulatory barriers prohibiting or limiting the use of vegetable proteins at EU and Member State level, especially in the area of meat products and specialised nutrition.
- Mitigating the risks and challenges posed by the introduction of more restrictive EU legislation especially in the area of novel foods, GMO, health claims, food improvement agents and allergens.

➔ But more challenges and opportunities emerge which could impact the development of plant proteins …

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III. REGULATORY AND POLICY ISSUES

REGULATORY PRIORITY DOSSIERS 2018 and beyond:

- Implications and further (national) initiatives on or beyond the Food Labelling Regulation 1169/2011 : Country of origin labelling, labelling of meat names for analogue products, vegan and vegetarian definitions.

- Implications of the European Court Ruling on new breeding innovation addressed via our FOOD & FEED Coalition.
- Introduction of more restrictive Pesticide MRL's and limits on contaminants.

- "What is novel or not novel", making sure the interpretation, scope and guidance of Regulation 2015/2283 does not negatively impact the introduction of various plant proteins.

- International developments on protein quality (FAO) or protein calculation (NCF at CX CCNFSDU).

THANK YOU FOR YOUR ATTENTION!

QUESTIONS?

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QUESTIONS ?

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EUVEPRO secretariat