SYSTEMIQ

SEIZING THE ECONOMIC OPPORTUNITY OF ALTERNATIVE PROTEINS IN EUROPE

Delivering prosperity from farm to factory

EUROPE SUMMARY AND COUNTRY DEEPDIVES

JANUARY 2026

SYSTEMIQ

AUTHORS AND ACKNOWLEDGEMENT

SYSTEMIQ CORE TEAM

Alex Andreoli, Nanne van Doorn, Rupert Simons

FINANCIAL SUPPORT

Thank you to the Good Food Institute Europe (GFI Europe) for commissioning this report and acting as a key adviser and partner. The views expressed in this report do not necessarily represent those of GFI Europe.

SOURCES USED FOR THIS ANALYSIS

The analysis is based on a range of assumptions, gathered from:

A review of scientific studies and industry reports – A comprehensive list of key sources is provided in the Technical Annex, while specific uses are listed in the end notes

Interviews with 50 experts from various stakeholder groups in the food and alternative protein sector. A full list is provided to the end of this report.

CITATION

If reproducing or referencing the content in this report, please use the following citation: Systemiq (2026). Seizing the economic opportunity of alternative proteins in Europe: Delivering prosperity from farm to factory.

SYSTEMIQ

SEIZING THE ECONOMIC OPPORTUNITY OF ALTERNATIVE PROTEINS IN EUROPE

Delivering prosperity from farm to factory

We are on the cusp of a new era in how food is produced, and the EU has the opportunity to lead the way. Building a robust domestic alternative protein industry would enable the EU to unlock major economic opportunities while strengthening its strategic autonomy. Over the next 15 years, this emerging sector could deliver substantial industrial and rural growth, high-quality employment, and greater economic resilience.

ALTERNATIVE PROTEINS AS AN INDUSTRIAL PRIORITY

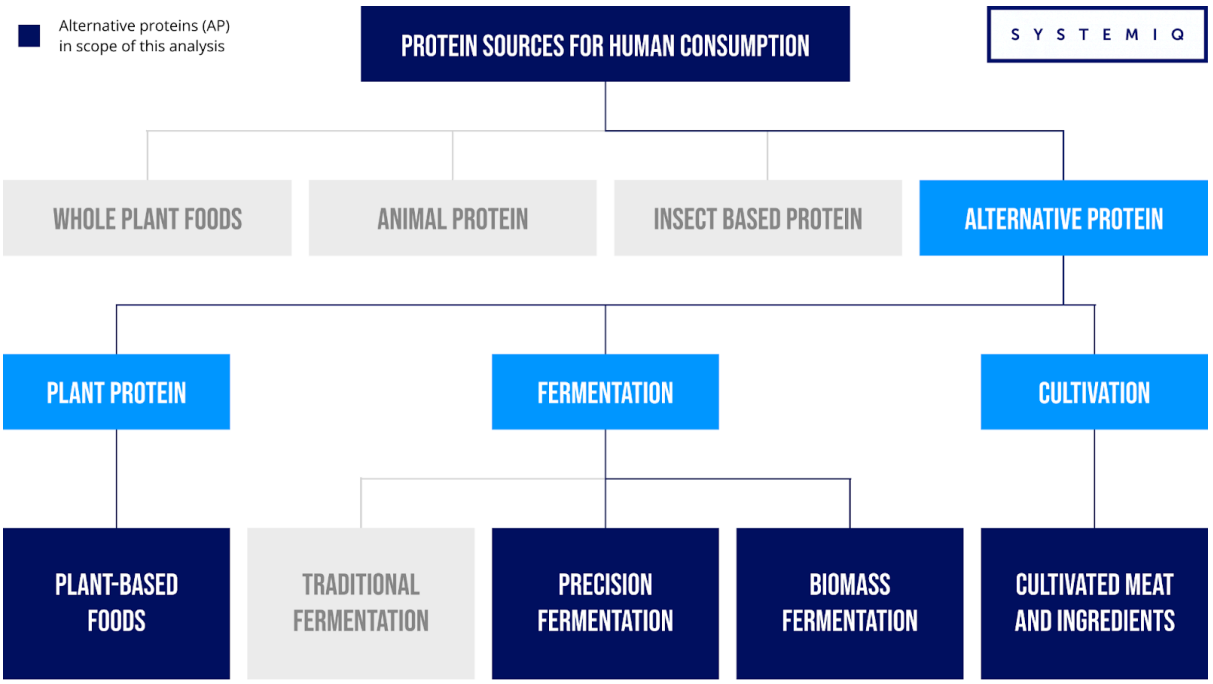
Alternative proteins involve using plant-based, cultivated, precision fermentation and biomass fermentation technologies to recreate the experience of meat, dairy, eggs and seafood. This approach could deliver foods that are as delicious as the meat and dairy people enjoy today, at a fraction of the environmental impact.[1]

If they were to reach price parity with conventional animal protein, these more sustainable options would also become widely accessible. This would help to strengthen the resilience of Europe's arable agriculture sector, reduce reliance on industrial animal agriculture and associated feed imports, whilst delivering significant environmental and planetary health benefits.

The development of the EU's alternative protein sector is also a strategic industrial opportunity: their production draws on capabilities deeply interconnected with the EU's existing industrial base, from biotechnology and other innovative industries to its manufacturing sectors. These existing industrial capabilities, combined with the EU's cutting-edge scientific ecosystem, give the EU an advantage in scaling production and driving innovation.

[1] See the academic publications cited in GFI "Environmental benefits of alternative proteins"

Figure 1: The four main types of alternative proteins covered in this analysis



Source: adapted from: FAIRR, 2024: Protein Diversification: A Tool to Address Climate, Nature, and Public Health Risks

THREE PATHWAYS FOR GROWTH

The trajectory of alternative proteins in the EU will depend on the choices policymakers make today. **We have constructed three possible scenarios for the coming 15 years with different levels of policy support.**[2] While the High Ambition scenario illustrates the full potential of the sector, this report focuses on the Moderate Policy Support scenario as a robust, within-reach route for the EU to realise the economic opportunities of alternative proteins.

1. BUSINESS AS USUAL

In a ***Business as Usual*** scenario, regulatory processes stay slow and unpredictable, and fragmented public investment leaves large gaps in technical progress and commercial scale-up, which prevent products from reaching taste and price parity in a timely manner, restricting consumer interest. In this scenario, the EU falls behind global competitors.

2. MODERATE POLICY SUPPORT

In a ***Moderate Policy Support*** pathway, consumer appetite grows steadily as products improve in taste and reduce in price. Regulatory processes become more predictable and inefficiencies are reduced, while targeted public R&D investment maintains the EU's position as a global innovation hub. Pilot infrastructure expands in leading countries, attracting more private capital.

3. HIGH AMBITION

In a ***High Ambition*** scenario, strong R&D activity, regulatory support, and robust public-private investment quickly propel alternative proteins to taste and price parity, leading to widespread consumer adoption. The EU emerges as a global leader in innovation, exports, and jobs.

[2] For further detail on the exact assumptions made in each scenario, please refer to our technical appendix.

Figure 2: Overview of alternative protein types

PLANT-BASED FOODS	Foods derived from crops such as soy, peas, or beans, processed to mimic texture, flavor, and nutritional profile of animal-based products	**PRECISION FERMENTATION**	Uses microbes such as yeasts as "cell factories" for producing specific functional ingredients, such as rennet and egg white
CULTIVATED MEAT AND INGREDIENTS	Made from animal cells which are cultivated in fermentors (similar to those used for brewing beer), and mixed with plant ingredients	**BIOMASS FERMENTATION**	Leverages the fast growth and high protein content of many microorganisms to efficiently produce large quantities of protein

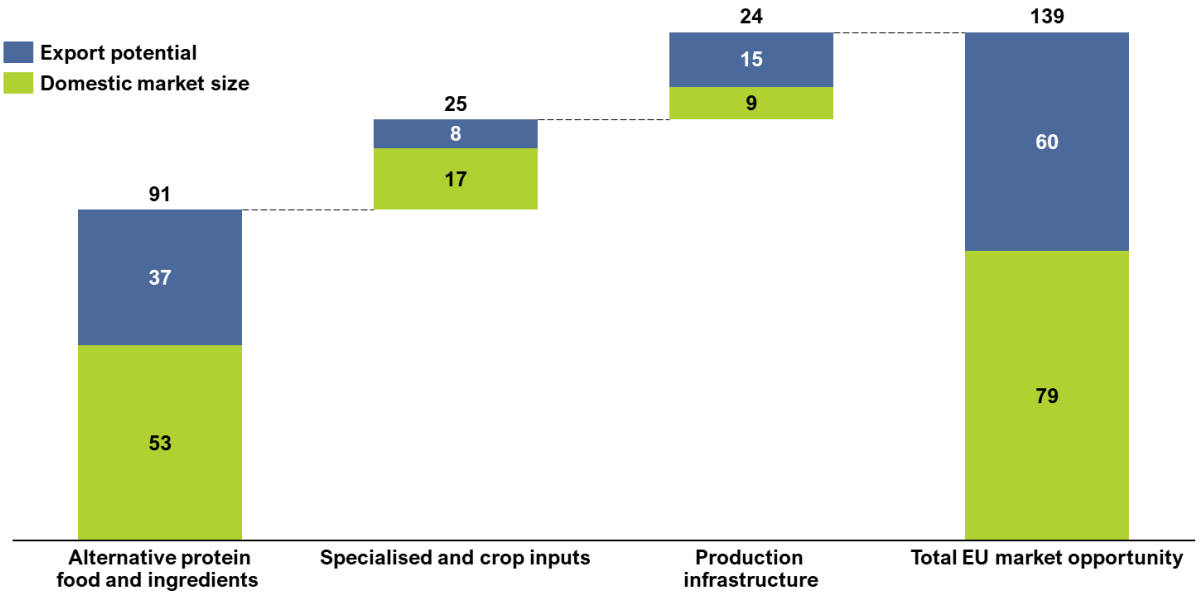
THE BENEFITS FOR DOMESTIC MARKETS AND TRADE

With supportive policies, alternative proteins could meet **10% of the EU's meat and 25% of its dairy demand by 2040.** In our scenario, demand for alternative protein food and ingredients in the EU could be worth **€53 billion by 2040, bigger than the European chocolate market (€47.3 billion).**[3] Beyond food end products, the sector would drive value chains in crops, feedstocks, bioreactors, and processing equipment – areas where the EU already has strong industrial capabilities. When the full value chain is accounted for, the total market opportunity could reach **€79 billion**, **comparable to Lithuania's GDP in 2024. Export potential would also reach €60 billion by 2040**, positioning the EU as a global biomanufacturing hub.

Credit: Planted

[3] Mordor Intelligence Europe Chocolate Market

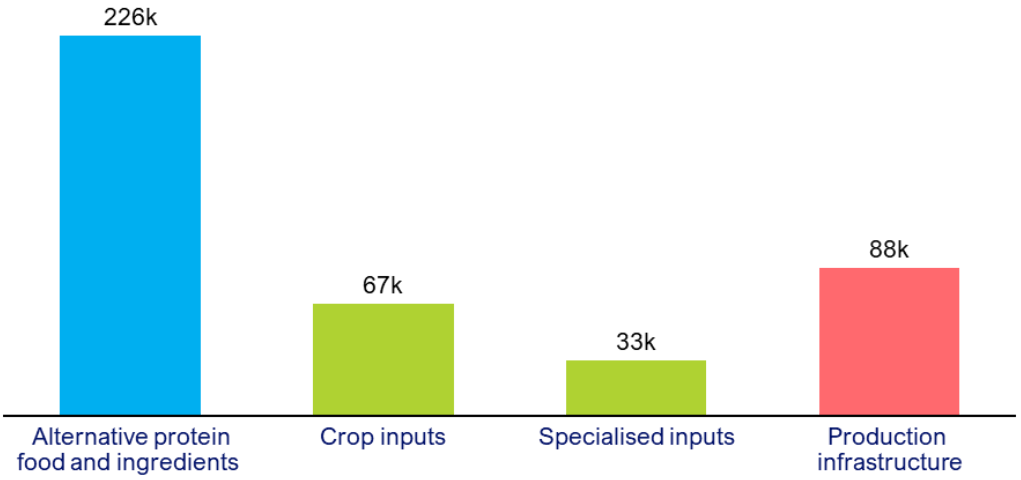
Figure 3: Yearly domestic market size and export potential of alternative proteins by 2040 in € billions, Moderate Policy Support scenario



EMPLOYMENT POTENTIAL & GVA

By 2040, alternative proteins could contribute **€111 billion** to the EU's economy each year by creating demand along the entire supply chain. Within 15 years, the sector could also support almost **half a million jobs**, spanning arable agriculture, R&D, manufacturing, logistics, and marketing, boosting both industrial competitiveness and local livelihoods.

Figure 4: Number of jobs supported by alternative proteins, Moderate Policy Support scenario, 2040



Our modelling suggests that the potential economic benefits of alternative proteins could be even more substantial in the high ambition scenario. In this scenario, by 2040 the domestic market could grow to €205 billion, or €333 billion when accounting for the full value chain. Likewise, the sector could support 1 million jobs, create €128 billion in export value and contribute €260 billion annually to the EU economy. Achieving this, however, would require significantly higher levels of annual investment in public R&D and CAPEX (€2.7 billion each).

Figure 5: Type of jobs supported by alternative proteins, Moderate Policy Support scenario, 2040[4]

Job category	Description	Examples	Average wages
Alternative protein production	Employees in alt. protein companies, across roles	**Production as well as business roles**, incl., strategy & sales; supply chain managers	45 – 55k
Crop inputs	Farmers to supply agricultural produce at scale	**Farmers** supplying crops and feedstock for media (e.g., sugars); **agronomists**	30 – 45k
Specialised inputs	Scientists for sophisticated technical processes	**Microbiologists** and **food technologists**, general **lab technicians**	75 – 80k
Food processing equipment	General processing machinery manufacturers	**Operators scaling outputs** & increasing automation, ongoing **quality assurers**	60 – 70k
Specialised equipment	Highly specialized machinery manufacturers	**Bioprocess engineers** and specialists	65 – 75k

[4] Average wage levels use Germany as a proxy for EU countries with significant alternative protein industries. Source: Systemiq (2025) "A Taste of Tomorrow: How protein diversification can strengthen Germany's economy"

STRENGTHENING EU ARABLE AGRICULTURE

With regards to the impact of alternative proteins on European agriculture, this report's analysis focuses exclusively on how the growth of alternative proteins might affect arable farming. It finds that alternative proteins could create three enabling factors for strengthening the resilience of the EU's arable agricultural sector over the long term:

ENABLING FACTOR 1: GROWING THE MARKET FOR LEGUMES AND PULSES.

A strong domestic plant-based meat and dairy sector would boost demand for food-grade legumes and pulses. In our Moderate Policy Support scenario, higher consumption of plant-based meat and dairy leads to a significant increase in demand for pulses, approximately doubling demand for field peas, fava beans and chickpeas, and a seven-fold increase in demand for lentils. This increased demand could serve as a key enabling condition for farmers interested in shifting to these crops. Such shifts could, over the long term, reduce critical import dependencies and enrich soils through nitrogen fixation, while diversifying farm incomes.

Figure 6: Growth in EU pulse and legume production in MMT, 2040 levels, Moderate Policy Support scenario.[5]

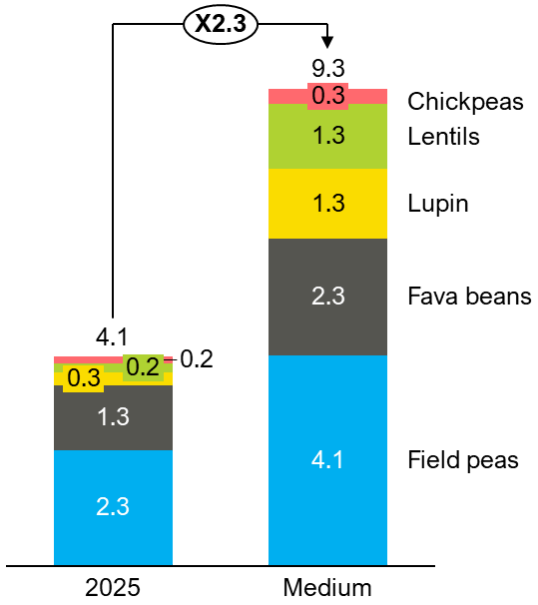
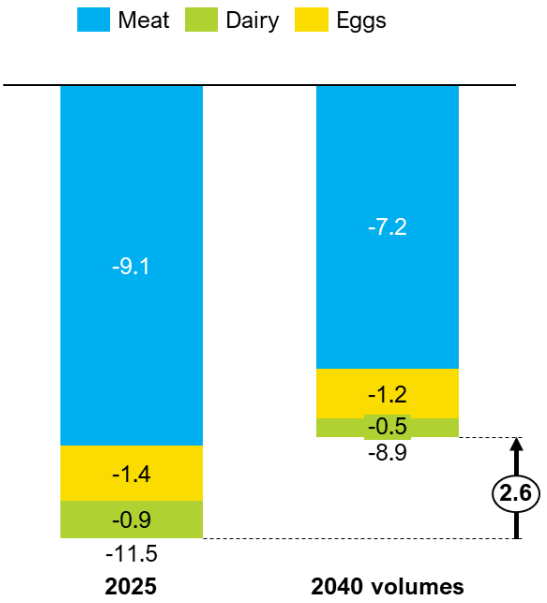


Figure 7: Future soybean meal import volumes under a Moderate Policy Support scenario (2040, MMT)[6]



[5] Systemiq analysis, based on Eurostat "Crop production in EU standard humidity" dataset. Conversion rates from plant-based products to crop volumes based on GFI, "Comparative life cycle assessment of plant-based meats and conventional animal meats".

[6] See Technical Appendix for methodology

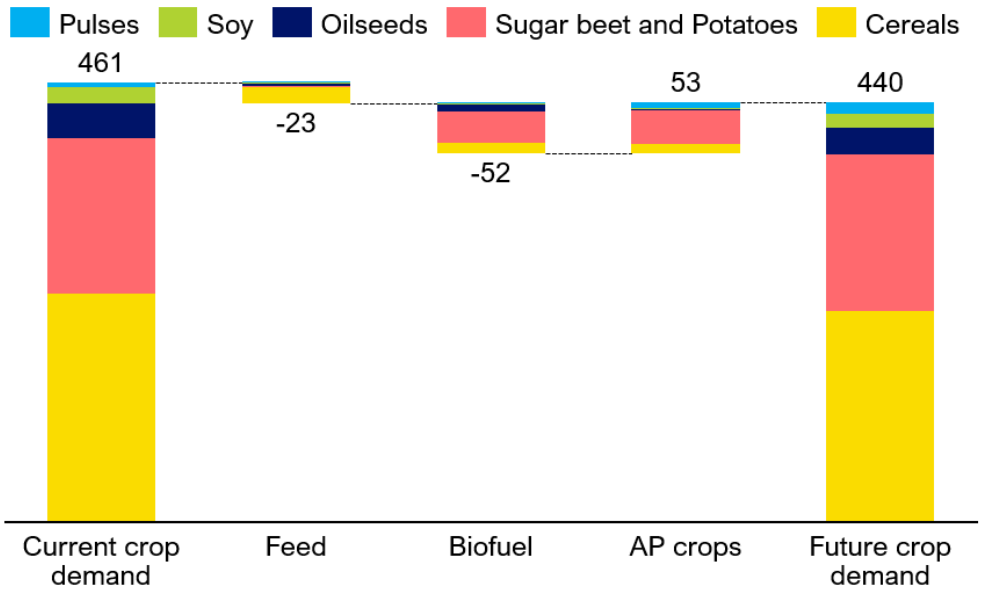
ENABLING FACTOR 2: INCREASING SELF-SUFFICIENCY IN HIGH-PROTEIN CROPS.

A shift towards alternative proteins could help shrink the EU's protein deficit in two ways: as described above, by supporting an expansion of domestic protein crop supply, and by reducing demand for high-protein feed imports in the first place. In our model, the need to import soy for high-protein animal feed would fall by around 2.6 MMT, significantly lowering the EU's deficit in this category (see Figure 7). When including all types of feed (eg. domestically grown grains), overall demand for feed would reduce by 23 MMT (see Figure 8).

ENABLING FACTOR 3: MOVING FROM FEED- TO FOOD-GRADE CROPS.

A scaled alternative protein sector in Europe could create demand for cereals, sugar crops, pulses, soy, and oilseeds as feedstock, offsetting the expected decline in demand for biofuel and feed crops. With the right market conditions and support in place, this shift could offer farmers future-proof market opportunities and potential economic benefits.

Figure 8: Crop demand for alternative protein production, MMT, 2040



SYSTEMIQ

UNLOCKING THE OPPORTUNITY

1. POLICY AND REGULATION

A more predictable, harmonized, and transparent regulatory framework is needed to spur innovation and increase investor confidence, in order to bring innovative products to market more efficiently.

2. INFRASTRUCTURE

The current production base needs to scale up through greenfield development and retrofitting. Fortunately, the EU has proven, through sectors like renewable energy, that rapid scale-up is possible when industry and policy move in sync.

3. INVESTMENT

Public investment will be essential to unlock private finance. Targeted annual public support for both R&D (€690 million) and CAPEX scale-up (€720 million) can bring alternative proteins closer to taste and price parity, and de-risk scale-up to catalyse private investments, paving the way for an innovative European food industry.

CALL TO ACTION

*The EU has a **unique opportunity** to lead global protein diversification. With coordinated action on **regulation, infrastructure, and investment**, alternative proteins can deliver major benefits for the EU economy by 2040. The question is not whether the EU can afford to invest, but whether it can afford not to.*

With the right policies, the EU can deliver prosperity from farm to factory, shaping a sustainable and innovative food future.

SYSTEMIQ

SEIZING THE ECONOMIC OPPORTUNITY OF ALTERNATIVE PROTEINS IN SPAIN

Delivering prosperity from farm to factory

The EU stands at the beginning of a new chapter in how food is produced, and Spain has a unique opportunity to help lead this change. For Spain, this transition offers the chance to build on its strong agricultural base, scientific expertise, and growing bioeconomy to foster a more sustainable and innovative food system. Developing alternative proteins can open new industrial markets, support rural livelihoods, and create high-quality jobs across the value chain. Alternative proteins offer a pathway toward a more resilient and competitive food economy within the EU.

ALTERNATIVE PROTEIN LANDSCAPE

Spain's alternative protein sector is evolving from early hype into a phase of steady growth. The plant-based category, especially dairy alternatives, has taken off, with strong consumer interest and a visible presence in retail and food service.

Established food companies, regional leaders, and engaged investors are driving this momentum, demonstrating a strong affinity with Spain's government-led strategy of blending food tradition and innovation.[7] All of this positions Spain as a dynamic and promising market for alternative proteins in southern Europe.

While Spanish consumers take pride in the concept of the Mediterranean diet – characterised by high vegetable content and moderate levels of animal protein – actual Spanish eating habits include high meat and low legume consumption.[8]

Alternative proteins could help bring diets closer to Mediterranean diet principles by offering practical ways for consumers to return to these food traditions without having to overhaul their modern habits.

[7] Page 60: "Nowadays, food is an engine for Spain's economic growth, and an example of balancing tradition and innovation"
[8] Source: A comparison of the Mediterranean diet and current food consumption patterns in Spain from a nutritional and water perspective

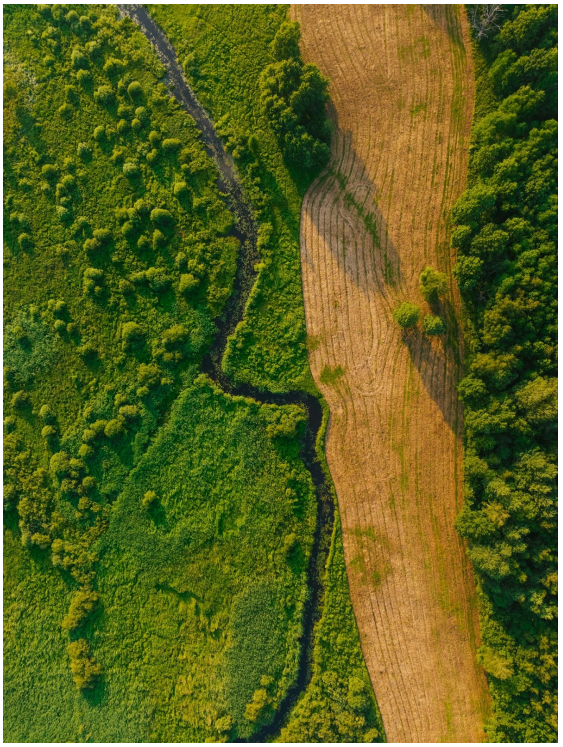
STRENGTHENING ARABLE AGRICULTURE

Spanish arable agriculture faces mounting pressures from soil degradation, water scarcity, and increasing exposure to climate risks such as droughts and floods. Some of these challenges are being intensified by the country's resource-intensive pig farming sector, which contributes to competition for limited water resources – particularly in regions such as Catalonia.[9]

A gradual shift toward alternative proteins could help ease pressure on land and water systems, improve environmental resilience, and support the long-term sustainability of Spain's agricultural landscape. Expanding the production of legumes and pulses to supply a growing plant-based sector could contribute to improved soil health and more diverse crop rotations, whilst increased nitrogen fixation would reduce reliance on synthetic fertilisers.

Beyond the potential environmental benefits, Spain's robust agricultural base could serve as a foundation for a domestic alternative protein value chain.

The country already produces large volumes of **barley, wheat, maize, sugar beet, and potatoes**, which could serve as valuable feedstocks for fermentation and ingredients for plant-based meat and dairy production. Spain also grows a range of legumes for human consumption, including peas, fava beans, lentils and chickpeas: crops that are likely to become important inputs for the future plant-based meat sector. It is also the EU's leading **almond producer**, accounting for roughly two-thirds of total EU output, positioning Spain well for ingredients used in plant-based dairy.



Industry initiatives are picking up to stimulate domestic crop production: Elian, a leading Spanish agrifood trader, will produce texturized plant proteins in their new facility in the port of Barcelona and partner with farmers to grow local soy.[10] **Such initiatives could help link rural producers to food innovation markets, reduce import dependence, and build agricultural resilience.**

[9] El País (2024) La sequía lleva a Cataluña a revisar el modelo de producción agrícola: "Nos están dejando morir"

[10] Oil & Fats International (2024) Elian Barcelona begins operations at renovated soyabean processing plant at Port of Barcelona

SYSTEMIQ

UNLOCKING SPAIN'S POTENTIAL

Looking ahead, Spain has strong foundations on which to grow its alternative protein sector. With new industrial investments, regional leadership, and early policy signals, the country is beginning to connect innovation, agriculture, and sustainability across a single value chain. Progress now depends on scaling production, supporting farmers, and improving the affordability of alternative protein products.

If the right conditions are put in place, by 2040, alternative proteins could generate a **significant opportunity** for the Spanish economy.

- They could contribute **€10 billion annually in gross value added (GVA)**, with **20% of this contribution stemming from the broader value chain** (equipment, logistics, and inputs).

- They could represent a **domestic market for alternative protein end products of nearly €6.7 billion – larger than the domestic Spanish coffee market (€5.6 billion).**[11]

- Beyond food end products, the sector drives value chains in **crops, feedstocks, bioreactors, and processing equipment**, areas where Spain already has industrial strengths. When the full value chain is accounted for, the total market opportunity could rise to **€9 billion.**

- **Trade opportunities** could reach **€3 billion by 2040**, comparable to the value of Spanish olive oil exports.[12] This would position Spain as a biomanufacturing hub.

- The sector could **support 34,000 jobs**, comparable to all new tourism-related jobs created in Spain in Q1 2025.[13] These jobs would span R&D, manufacturing, logistics, and marketing, but also arable agriculture roles supplying the input critical for the sector's success.

[11] Grand View Horizon: Spain Coffee Market Size & Outlook, 2025-2030

[12] Trend Economy (2024) Spain | Imports and Exports | World | Olive Oil | Value (US$) and Value Growth, YoY (%) | 2012 - 2023

[13] Europa Press (2025) El turismo genera más de 34.000 nuevos empleos en España durante el primer trimestre del año

Figure 1: Spain yearly domestic and export market size by 2040

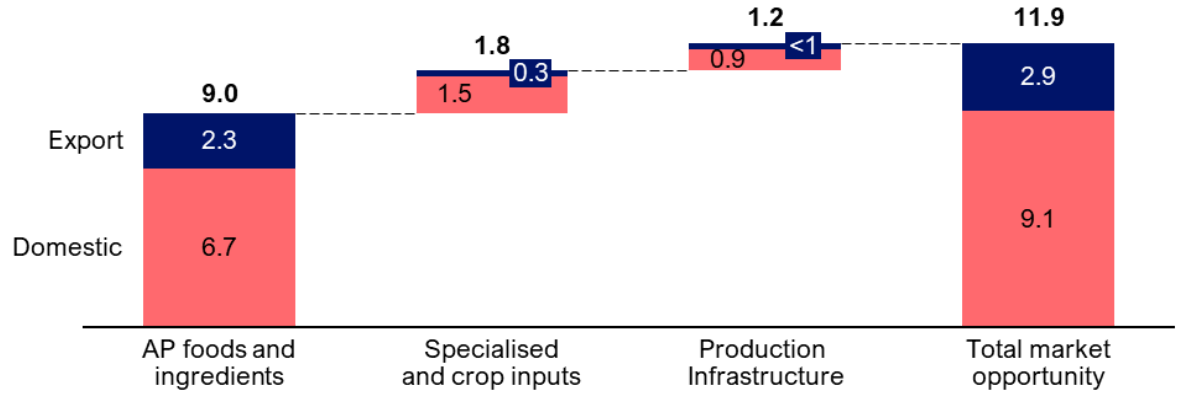
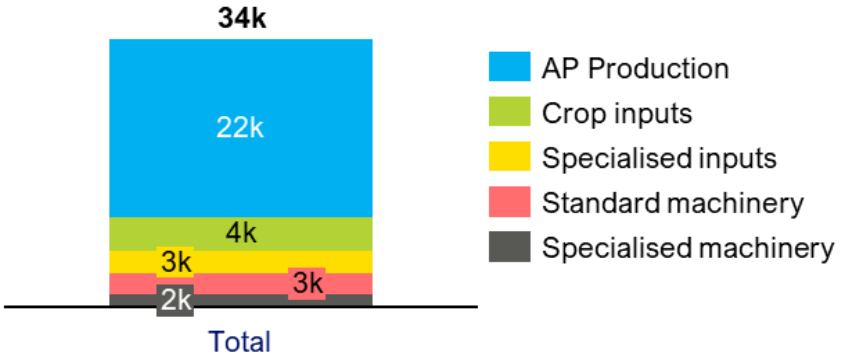


Figure 2: Job potential in Spain by 2040



SYSTEMIQ

SEIZING THE ECONOMIC OPPORTUNITY OF ALTERNATIVE PROTEINS IN ITALY

Delivering prosperity from farm to factory

The EU stands at the beginning of a new chapter in how food is produced, and Italy could play an important role in shaping how this food transition unfolds. Known worldwide for its culinary heritage and quality, Italy possesses a strong agri-food industry and scientific infrastructure. With the right policy signals and a shared vision across society and industry, Italy could convert its vast expertise in food, biotech, and manufacturing into a new source of economic and environmental resilience.

ALTERNATIVE PROTEIN LANDSCAPE

Italy's alternative protein ecosystem is entering an exciting formative stage. While the national debate around food innovation remains lively, Italy continues to nurture research and development in this field.

Beyond the headlines, a quiet but determined community is emerging. Universities are beginning to explore new technologies with Italy home to the largest number of researchers working on alternative proteins in Europe.[14] Established food and biotechnology companies are exploring partnerships[15] in plant-based and precision fermentation innovation.

These early efforts signal the start of a new phase where Italy's scientific expertise and world-class food industry could come together to shape the country's own approach to alternative proteins.

CONSUMER APPETITE

Italy's plant-based meat and dairy market has seen steady growth over recent years,[16] reflecting consumers' openness to new food experiences.

Whilst Italy's deep-rooted culinary culture shapes how new food innovations are received, this attachment to quality, taste, and authenticity could become a powerful driver for growth if alternative proteins are introduced in the right way. The debate around "what is Italian food" is a passionate one, yet it also reflects a strong national interest in how food evolves.

[14] GFI Europe (2024) Alternative protein publication landscape analysis

[15] EU Start Up (2024): Arsenale Bioyards raises €9.5 million to cut biomanufacturing costs by 90%

[16] GFI Europe (2025) Plant Based Retail Sales Data 2020-2024

By emphasizing excellence, regional ingredients, and culinary creativity, the narrative can evolve from one of opposition to one of opportunity, the Italian alternative protein sector can sit comfortably alongside, and even strengthen, the "Made in Italy" brand.

STRENGTHENING ARABLE AGRICULTURE

Whilst Italy remains a cornerstone of European agriculture, its arable sector faces mounting pressures. The country is particularly dependent on protein imports, with some estimates suggesting that, in 2023, nearly 70% of Italy's soy demand was met through imports.[17] At the same time, the sector continues to grapple with the impacts of climate change, increasing weather volatility, and rising input costs.

A gradual shift to alternative proteins could create the enabling factors for strengthening Italy's protein self-sufficiency and environmental resilience over the long term. A robust domestic alternative protein sector would reduce the demand for imported feed, whilst providing improved market conditions to support Italian farmers seeking to shift to growing food-grade protein crops. Expanding the production of legumes and pulses to supply a growing plant-based sector could contribute to improved soil health and more diverse crop rotations, whilst increased nitrogen fixation would reduce reliance on synthetic fertilisers.

Beyond these wider benefits, **Italy's strong agricultural base offers an opportunity to anchor a domestic alternative protein value chain.** The country is already a major

producer of wheat, maize, barley and oats. The country is also a growing producer of 5 legumes and pulses. Italy is the EU's second biggest producer of chickpeas.[18] Despite the overall gap between demand and supply, Italy accounted for 36% of EU soybean production in 2024.[19] This makes it particularly well-placed to serve the growing alternative protein market, creating a vertically integrated value chain from farm to finished product.

However, the connection has not yet been made between these agricultural assets and the needs of a growing alternative protein industry, and current plant-based producers have yet to consolidate the market demand that would unlock this transition.

[17] Ismea (2024) L'agroalimentare italiano migliora l'autosufficienza, ma resta alta la dipendenza da importazioni in filiere chiave

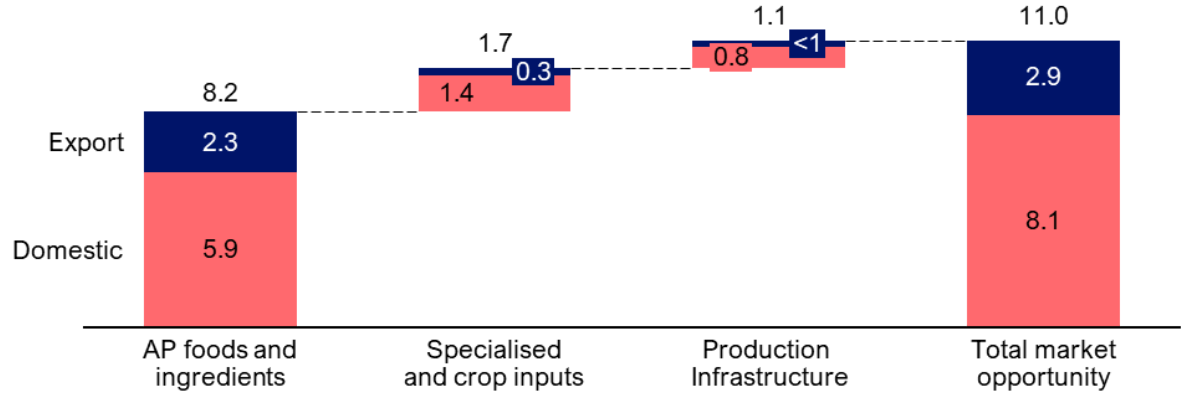
[18] Crea Futuro (2025) Legumi: le proteine alternative da rilanciare

[19] Scientific Papers Series Management, Economic Engineering in Agriculture and Rural Development (2025) La soia nell'Unione europea – una tendenza in crescita per coltivazione e produzione

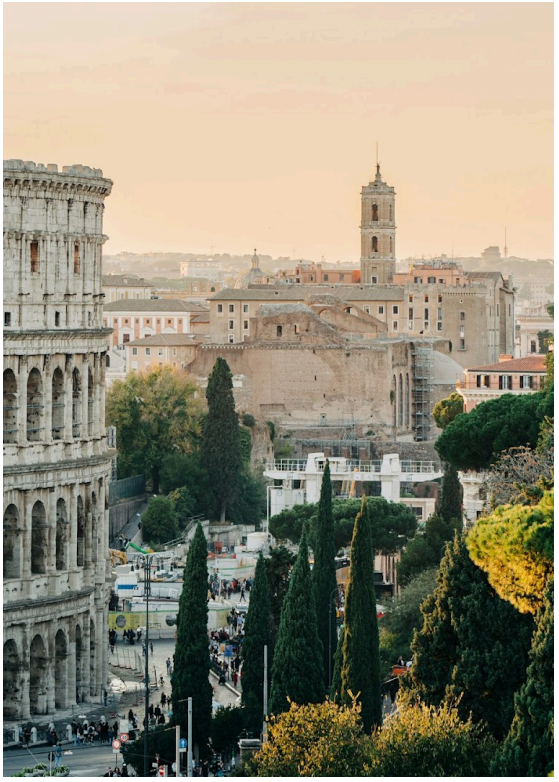
UNLOCKING ITALY'S POTENTIAL

If Italy mobilizes its scientific expertise, biomanufacturing infrastructure, and agricultural assets, the alternative protein sector could become a pillar of a modernized "Made in Italy" brand, combining tradition with innovation that can complement conventional animal agriculture. The country has the tools to lead Europe in quality: crafting exceptional, locally rooted alternative protein products that reflect Italy's values of taste, craftsmanship, and excellence.

Figure 1: Italy yearly domestic and export market size by 2040



With coordinated investment and a shared vision across society, Italy's alternative protein sector could evolve from nascence to leadership, turning one of the EU's most influential food cultures into a driver of sustainable growth. If the right conditions are put in place, by 2040 alternative proteins could generate a **significant opportunity** for the Italian economy.



• They could contribute **€10 billion in gross value added (GVA) annually** by 2040, with **20% from the broader value chain** (equipment, logistics, and inputs).

• They could represent a **domestic market for alternative protein end products of nearly €6 billion, twice the size of Italy's domestic olive oil market**.[20]

[20] Grand View Research (2025) Italy Olive Oil Market Size & Outlook 2023-2030

• Beyond food end products, the sector stimulates value chains in **crops, feedstocks, bioreactors, and processing equipment**, areas where Italy already has industrial strength. When the full value chain is accounted for, the total market opportunity could rise to over **€8 billion**.

• **Trade opportunities** could reach **€3 billion by 2040**, comparable with the value of Italian pasta exports in 2022,[21] positioning Italy as a biomanufacturing hub.

• The sector could **support 31,000 jobs**, spanning R&D, manufacturing, logistics, and marketing, but also arable agriculture roles supplying the input critical for the sector's success.

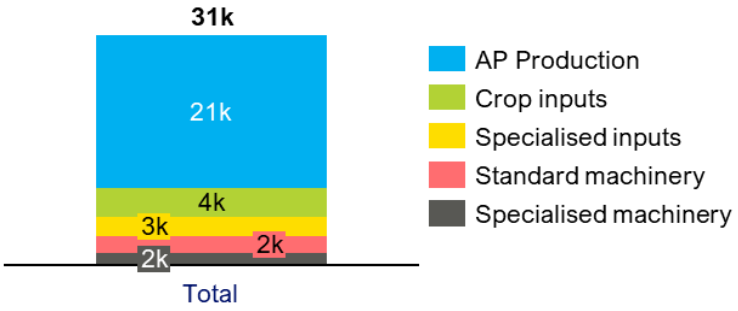


Figure 2: Job potential in Italy by 2040

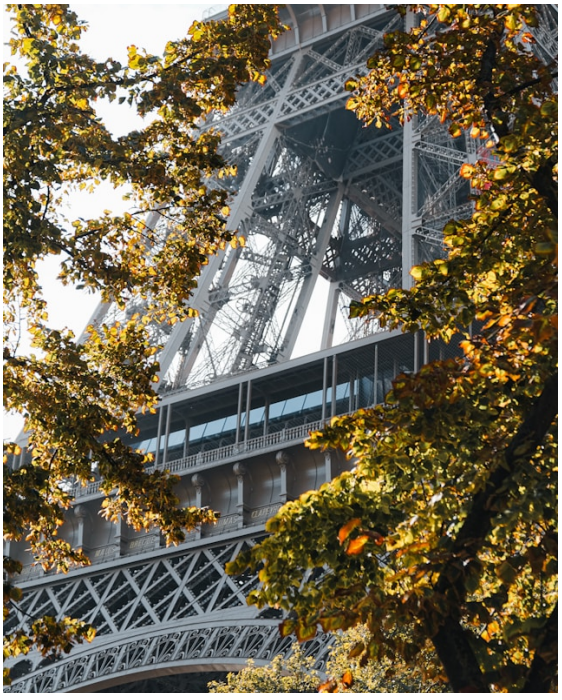
[21] Pasta Italiani (2023) Italia leader mondiale della pasta, +5,2% di export nel 2022 con un valore di 3,7 miliardi di euro (+31%)

SYSTEMIQ

SEIZING THE ECONOMIC OPPORTUNITY OF ALTERNATIVE PROTEINS IN FRANCE

Delivering prosperity from farm to factory

The EU stands at the beginning of a new chapter in how food is produced, and France can play a leading role. With its world-renowned culinary heritage, cutting-edge research base, and powerful agri-food industry, the country has everything it needs to lead the next generation of sustainable food innovation. A vibrant start-up ecosystem is already taking shape across all pillars of alternative proteins, supported by France's unrivalled expertise in science, flavour, and craftsmanship. If policy and industry begin to move in sync, France could become a European frontrunner, leveraging its food culture to catalyse protein diversification.



ALTERNATIVE PROTEIN LANDSCAPE

French consumers take great pride in their national food identity. Alternative proteins present an opportunity to evolve French gastronomy by combining the country's hallmarks of excellence and taste with a commitment to sustainability and innovation.

There is growing evidence of French interest in alternative proteins. The country's plant-based meat and dairy categories continue to perform strongly, outpacing most other major EU markets.[22] While cultivated meat has faced some political pushback, recent years have seen rising curiosity about precision fermentation, particularly given its natural synergies with France's traditional food sectors, such as cheese, dairy, and wine.

France also possesses key ingredients for success. It is home to one of Europe's most diverse alternative protein start-up communities. The French scientific and industrial ecosystem offers exceptional potential, uniting world-class research in biotechnology and food science with advanced manufacturing capabilities that could be readily adapted for fermentation and cultivated production.

[22] GFI Europe Plant Based Retail Sales Data 2020-2024

STRENGTHENING ARABLE AGRICULTURE

Whilst France remains a cornerstone of European agriculture, its arable sector faces mounting pressures. Reducing the country's dependence on imported proteins has become a central strategic goal to strengthen France's resilience to global supply shocks. This ambition is reflected in initiatives to expand the cultivation of food-grade protein crops on French soil.[23] At the same time, the sector continues to grapple with the impacts of climate change, increasing weather volatility, and rising input costs.

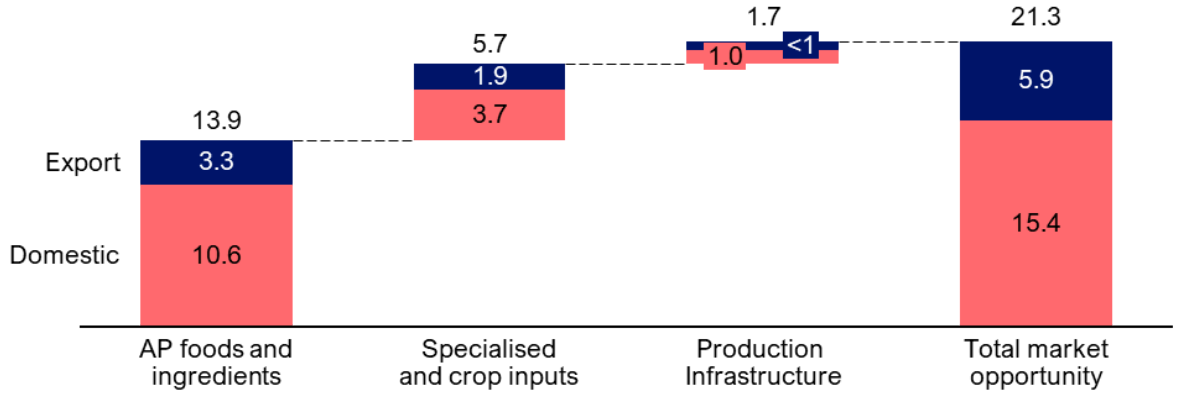
A gradual shift to alternative proteins could create the enabling factors for strengthening France's protein self-sufficiency and environmental resilience over the long term. A robust domestic alternative protein sector would reduce the demand for imported feed, whilst providing improved market conditions to support French farmers seeking to shift to growing food-grade protein crops. Expanding the production of legumes and pulses to supply a growing plant-based sector could contribute to improved soil health and more diverse crop rotations, whilst increased nitrogen fixation would reduce reliance on synthetic fertilisers.

Beyond the possible environmental benefits, France's robust agricultural base could provide a strong foundation for a domestic alternative protein value chain. The country is the EU's leading producer of wheat and maize,[24] field peas,[25] and the bloc's second-largest producer of sugar beet and potatoes.[26] France is particularly well-placed to expand upon this production to serve the growing alternative protein market, creating a vertically integrated value chain from farm to finished product.

[23] Ministère de l'agriculture de l'agro alimentaire et de la souveraineté alimentaire (2025) Planification écologique : 11,7 millions d'euros d'aides en faveur de la souveraineté protéique en France

[24] Eurostat: Agricultural production - crops
[25] Field pea markets in the European Union
[26] Eurostat: Agricultural production - crops. Statistics Explained

Figure 1: France's yearly domestic and export market size by 2040



UNLOCKING FRANCE'S POTENTIAL

France's deep connection to food, science, and culture gives it a unique role in shaping how the EU's food future will unfold. Far from starting from scratch, the country is already home to the expertise, technology, and creativity needed to lead. What remains is to connect these strengths under a shared national ambition. Momentum around precision fermentation, plant-based innovation, and culinary craftsmanship shows how sustainability and taste can evolve together, not in competition.

If France brings together its scientific excellence and culinary creativity, it can lead the EU's food transition. If the right conditions are put in place, by 2040, alternative proteins could generate a **significant opportunity** for the French economy:

- They could contribute **€18 billion annually in gross value added (GVA)**, with **20% of this contribution stemming from the broader value chain** (equipment, logistics, and inputs).

- They could represent a **domestic market for alternative protein end products of over €10 billion, comparable to the size of France's coffee market.**[27]

Credits: Planted

[27] France Coffee Market Size & Outlook, 2025-2030

• Beyond food end products, the sector drives value chains in **crops, feedstocks, bioreactors, and processing equipment** – areas where France already has industrial strength. When the full value chain is accounted for, the total market opportunity could rise to over **€15 billion**.

• **Trade opportunities** could reach **€6 billion by 2040**, comparable to the average value of French cereal exports between 2017 and 2021.[28] This would position France as a biomanufacturing hub.

• **The sector could support 64,000 jobs**, more than France's beverage manufacturing sector (53,000).[29] These jobs would span R&D, manufacturing, logistics, and marketing, but also arable agriculture roles to supply the inputs critical for the sector's success.

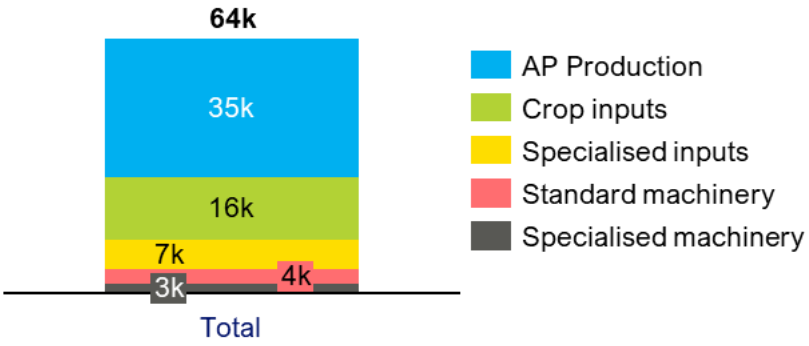


Figure 2: Job potential in France by 2040

[28] Intercéréales: Export of French cereals
[29] Insee: Fiches sectorielles - 2021