

From India to the world:

The export opportunity for smart proteins



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This resource provides general information based on secondary research. While the document can give broad guidance about international markets and their regulatory overview, it is important for brands to dive deeper to create their go-to-market strategies.

This report and other published content are not legal advice and should not be construed as such. Readers are encouraged to seek professional counsel to address questions specific to their needs.

If you have any queries or concerns, please contact us at india@gfi.org.

INTRODUCTION

India's agriculture is rich and diverse, offering a wide array of high-quality protein sources like chickpeas, soybeans, wheat, and millets. India also has multiple plant-based startups, many of which are exploring both domestic and international markets. Product offerings from these startups include both localised products (e.g., kebabs, curries, and biryanis) and western-style offerings, like burgers and sausages, appealing to a broad spectrum of palates globally and within India.

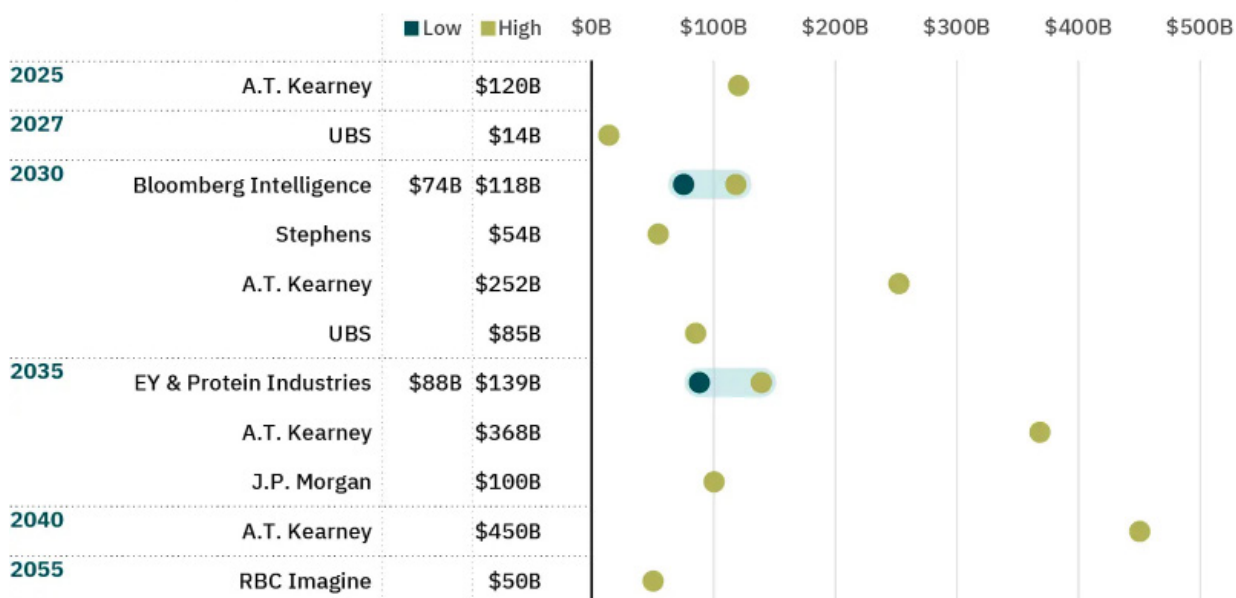
Owing to its strong agricultural base, startup ecosystem, food processing infrastructure, and cost-competitive manufacturing, India is well-positioned to become a significant international player in the supply of plant protein ingredients and finished products. This document aggregates data derived from secondary research to delineate potential market opportunities for exports from India and provide detailed profiles of target countries, encompassing consumer demographics, demand patterns, existing product offerings, major distribution channels, and regulatory frameworks.

FUTURE OUTLOOK

The global meat market is valued at approximately [USD 1,103 billion](#) as of 2024 and is projected to expand at a Compound Annual Growth Rate (CAGR) of 7.1% from 2024 to 2030, reaching an estimated value of USD 1,664 billion. In contrast, the plant-based meat sector, currently generating around USD 7 billion

in sales, is in a developmental phase. Multiple consulting firms, think tanks, and research institutions have predicted substantial growth for this category in the future. Projections for 2035 vary, with estimates ranging from USD 88 billion to USD 368 billion for the plant-based meat market.

Forecasts for global plant-based meat industry market size



Source: GFI State of the Industry Report 2024

CURRENT MARKET OPPORTUNITY

Global retail dollar sales of plant-based meat and seafood reached an estimated USD 6.4 billion in 2023. Europe and North America were the primary destinations for these sales. Germany and the United

Kingdom lead the six countries that make up 60% of the European Union's (EU) plant-based meat sales. While current market share in South America, the Asia Pacific region (APAC), and the

Middle East and North Africa (MENA) is smaller, these regions are experiencing growth.

Within APAC, Australia represents a significant market opportunity. Singapore is actively pursuing the advancement of alternative protein sources, encompassing both plant-based and cultivated meats. Singapore is also a critical player in the region that is helping global companies incubate, innovate, partner, and export their alternative protein solutions to the world. However, in other Southeast Asian nations, their market size remains limited even though traditional plant-based proteins like tofu and tempeh have historically been central to local

diets and cheap to produce.

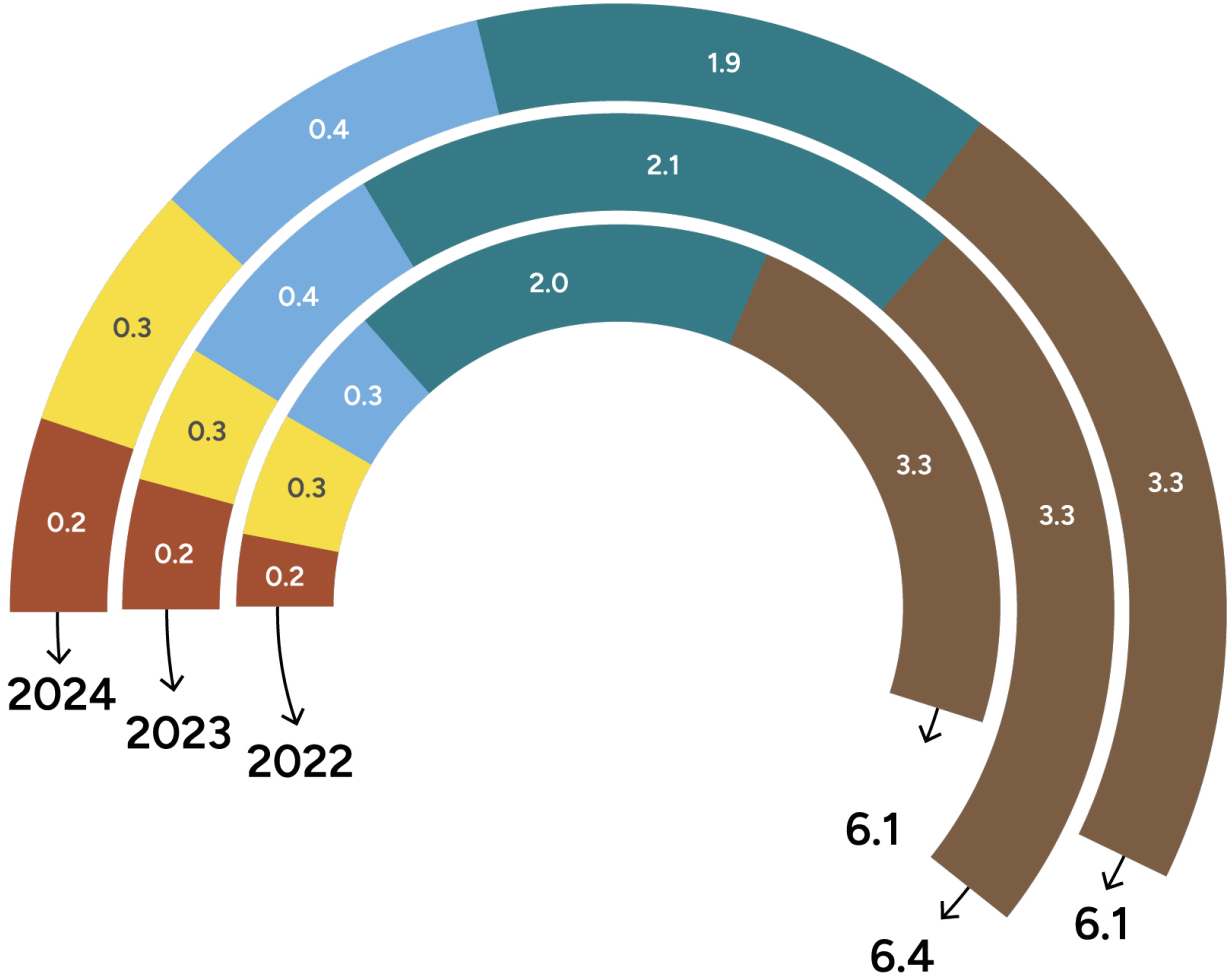
Governments in the Gulf Cooperation Council (GCC) are also actively increasing their commitment to alternative proteins as a strategy for enhancing food security and sustainability. They are actively promoting the establishment of manufacturing hubs and funding innovation research. For instance, Qatar is making substantial investments in alternative, sustainable protein technologies, including cultivated meat research and production.

Based on current market size, future potential, and governmental interest and investment, Germany, the UK, the U.S., Australia, Singapore, and the GCC have been identified as key markets for further in-depth analysis.

This document offers a detailed analysis of all shortlisted markets, examining their current market size, consumer profiles, key players, and plant-based

meat formats. It also outlines distribution channels, lists potential distributors for market exports, and details regulatory requirements.

Global plant-based foods retail sales estimates by region in Billion USD



- MENA
- APAC
- Latin America
- North America
- EU

Source: Euromonitor International Limited 2024 © All rights reserved: Staple Foods 2024, Meat & seafood substitutes; Snacks 2024, Plant-based ice cream; Dairy Products and Alternatives 2023, retail value RSP incl sales tax, US\$ fixed 2024 exchange rate, current prices. *APAC includes both the APAC and Australasia regions as defined in the Euromonitor dataset.

EXPORT POTENTIAL

A critical enabler for export potential is the accurate classification of plant-based products under the Harmonised System of Nomenclature (HSN) Code. The HSN Code determines the applicable export duty, eligibility for incentives,

and regulatory compliance. Clear and appropriate HSN classification is essential to streamline customs processes, avoid misclassification penalties, and ensure that exporters can compete effectively in global markets.

Plant-based proteins are broadly covered under Section IV of the HSN Codes that pertain to 'Prepared Foodstuffs; Beverages, Spirits And Vinegar; Tobacco And Manufactured Tobacco Substitutes; Products, Whether Or Not Containing Nicotine, Intended For Inhalation Without Combustion; Other Nicotine Containing Products Intended For The Intake Of Nicotine Into The Human Body,' and further under Chapter 21 under Section IV titled as 'Miscellaneous Edible Preparations.' The four-digit HSN Code of 2106 that covers the 'Foods preparations not elsewhere specified or included' and its sub-headings—'Other' bearing code 21069099 and 'Protein concentrates and textured protein substances' 21061000 are usually used to categorise plant-based proteins.

However, depending on several factors such as ingredients and product formats, there are a few other HSN Codes that could be applicable, e.g., 20049000 ('Other vegetables and mixtures of vegetables') and 23040030 ('Meal of soyabean, solvent extracted (defatted)'), which may not accurately describe the current generation of plant-based products with advanced ingredients. In India, some commonly used HSN Codes are 21069099, 21061000 and 20041000, and 23040030 and 12081000 for some soy-based alternative proteins. 2106102020 and 2106102030 both relate to soy-based protein concentrate and isolate.

Germany

The largest economy in the EU and the third-largest economy globally, following the U.S. and China

Population

84.5
million

Average age

45
years

Plant-based
meat sales
value in 2024
(EUR)

759
million

Growth over
2022



7.8%

Growth over
2023



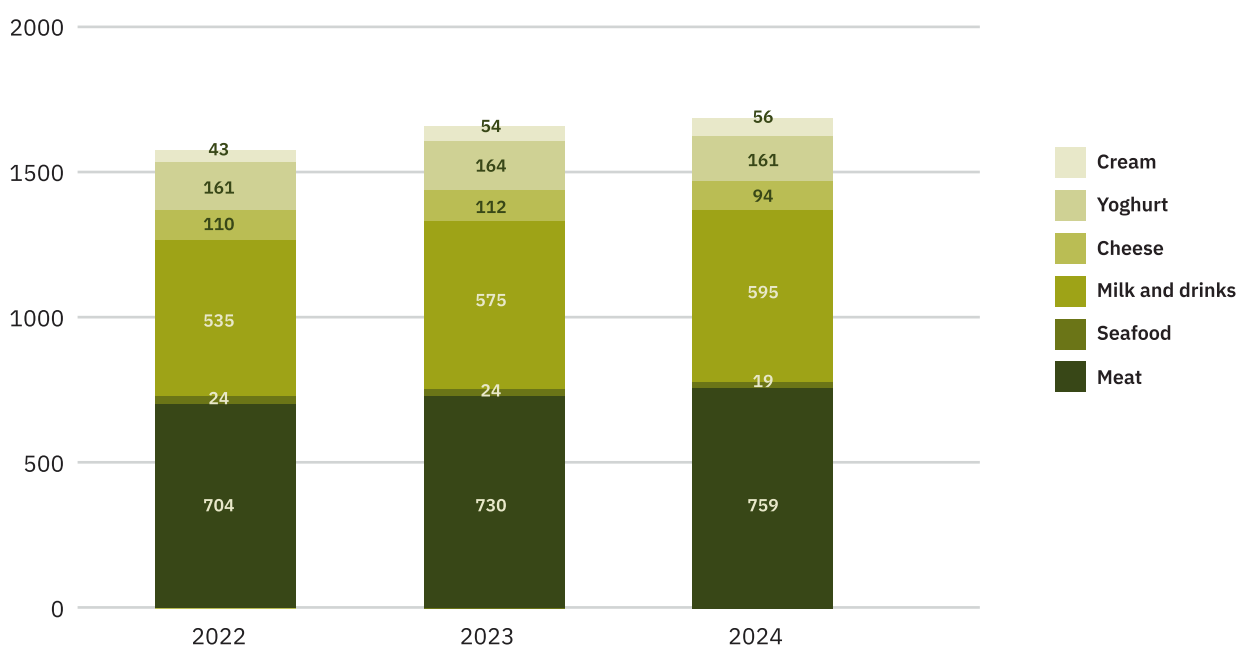
3.9%

01 Market size

The German plant-based market, the largest in Europe, is seeing ongoing increases in unit sales and sales volume, driven by rising sales of relatively affordable private-label products.

- The category has recorded sales of [EUR 1.7 billion](#) in 2024 across six categories: meat, seafood, milk and drinks, cheese, yoghurt, and cream. Sales value increased by 1.5% and volume by 7% over 2023. The relatively smaller increase in sales value is driven by private-label products (those sold under the brand of a retailer with a lower price point compared to other brands).
- Plant-based meat sales recorded a sales value of [EUR 759 million](#) in 2024. This is a growth of 7.8% over 2022 and 3.9% over 2023.
- Plant-based meat makes up 4.5% of the total pre-packaged meat market, including both plant-based and animal-based products.
- The market for plant-based seafood (eg, plant-based fish) in Germany has declined significantly. Following a peak in annual sales value at [EUR 24.4 million](#) in 2023, sales value fell by 23.9% between 2023 and 2024.
- In the German market, plant-based meat options that mimic familiar ‘meaty’ formats are significantly more popular than tofu, tempeh, and seitan, trailing behind with [EUR 75 million](#) in sales in 2024.

Plant-based food sales value by category in Germany, 2022-2024 (€ millions)



Source: Germany plant-based food retail market insights, 2022-2024

02 Consumer profile and demand

- [1% of the German population](#) adheres to a vegan diet, 4% maintain a vegetarian diet, and 39% identify as flexitarian, indicating occasional consumption of meat.
- [46% of German consumers](#) express a desire to reduce their consumption of animal-derived products within the next two years, and 30% intend to increase their intake of plant-based meat alternatives over the same period.
- [47% of consumers](#) agree that German policymakers should implement measures to expand the availability of plant-based options in public canteens, including those in schools and hospitals.
- In 2024, [32% of German households](#) purchased plant-based meat alternatives at least once, and 15% of households purchased plant-based meat six or more times over the year, demonstrating substantial uptake. Penetration and repeat purchase rates remained stable in the last three years.
- [GFI Europe's consumer study](#) in collaboration with HarrisX also found that 38% of German consumers said they want to eat more plant-based food, and 34% want to eat less animal meat and dairy. 21% want to reduce consumption of both meat and dairy.

Household purchase patterns for plant-based meats in Germany, 2022-2024

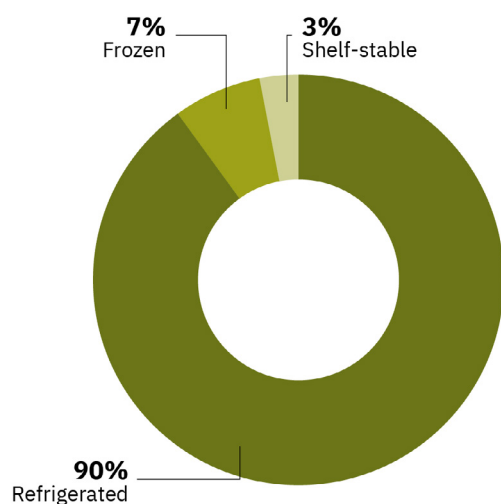
Germany	% buying at least once per year			% buying 6 or more times per year			% buying 12 or more times per year			% of sales value from discounter stores		
	2022	2023	2024	2022	2023	2024	2022	2023	2024	2022	2023	2024
Plant-based meat	32.6%	32.7%	32.2%	14.8%	15.3%	14.9%	9.8%	10.3%	9.7%	32.9%	33.3%	33.0%

Data source: NIQ Homescan Consumer Panel. Data is nationally representative of the household population in Germany. The data covers 'Take Home' shopping and comes from a sample of 20,000 households. Data covers "plant-based meat substitutes."

03 Product formats in the market

By storage condition

Contribution of plant-based meat to [sales volume](#) in 2024

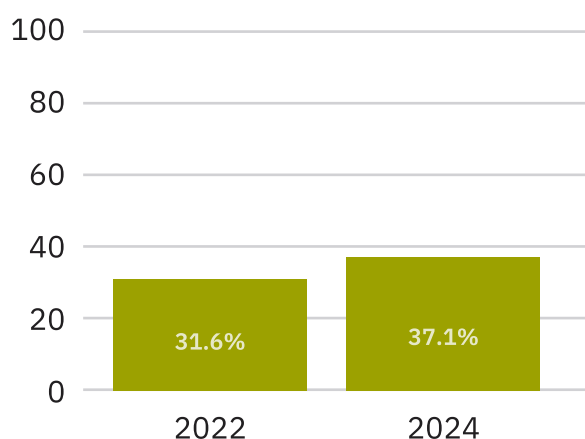


By format

- Sausage/salami is the most popular format within the plant-based meat segment.
- Plant-based seafood consumption trends indicate a preference for fish sticks and salmon formats.

Branded vs. private-labels

- Private-label plant-based meat products (ie, supermarket and discount store own-brand products) account for a large and growing part of Germany's plant-based market. Private-label products grew from **31.6%** of sales volume in 2022 to **37.1%** in 2024, likely driven by their affordability relative to branded products. In 2024, private-label plant-based meat products were on average **38%** cheaper per kg than branded products.

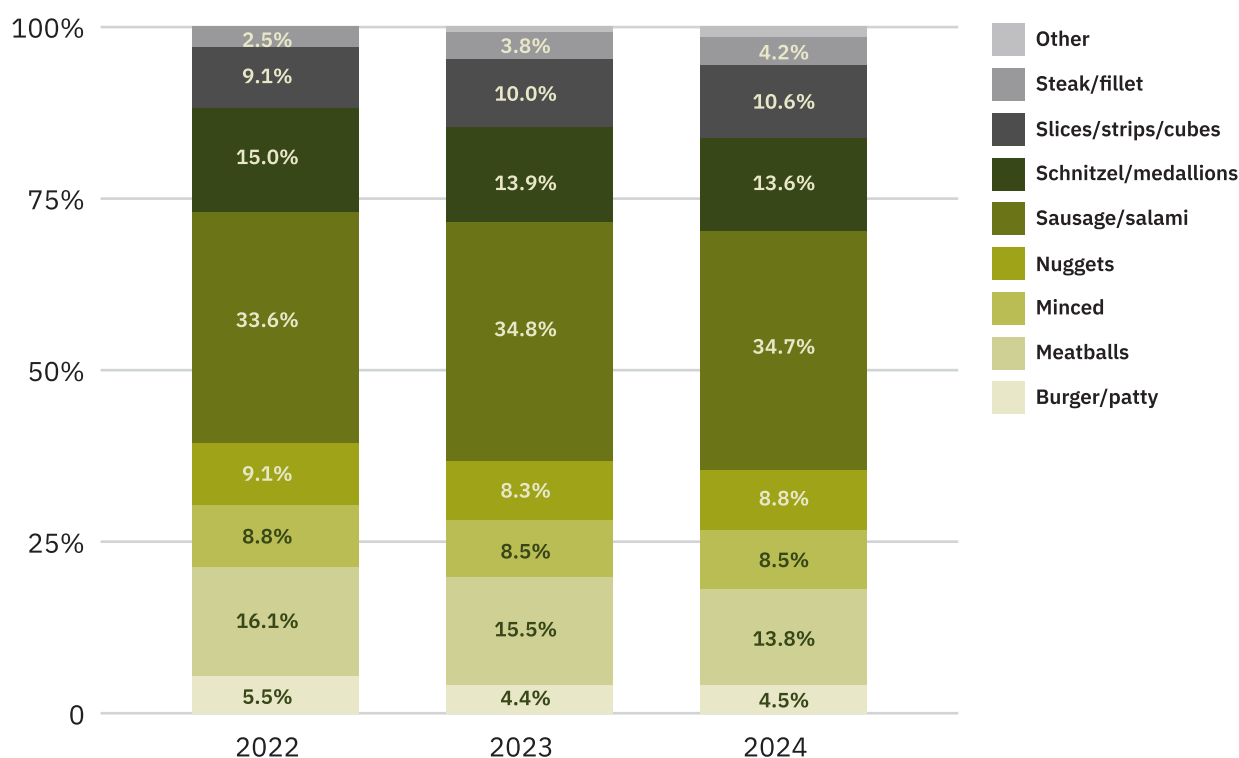


Pricing

- Plant-based meat commands a **45%** price premium over animal-derived meat, with an average price of EUR 14.1 per kilogram. Notably, this price

differential has exhibited a consistent annual decline, decreasing from a **49%** premium in 2022 to a **45%** premium in 2024.

Germany plant-based meat sales by format, 2022-2024 (% of sales volume)



Source: Germany plant-based food retail market insights, 2022-2024

04 Key players in the market

- In a survey carried out in July 2024, [78% of German consumers](#) demonstrated awareness of the **Rügenwalder Mühle** brand. This entity, formerly recognised for its meat products, now receives over 50% of its revenue from meat substitute sales, establishing itself as a consistent presence in German retail grocery outlets.
- Other brands with notable market presence include **Like Meat**, **Billie Green**, **The Vegetarian Butcher**, and **Garden Gourmet** (a Nestlé brand) in the meat sector. These are complemented by private label brands like **Vemondo** from Lidl and other brands from German retailers.

05 Key channels

Retail

- In Germany, supermarkets, followed by discount stores, are the [principal retail formats](#) for grocery purchases. Other significant channels include organic supermarkets, convenience stores, farmers' markets, online supermarkets, and specialised retailers.
- The four largest retail conglomerates, specifically **EdekaGroup**, **ReweGroup**, **SchwarzGroup**, and **AldiGroup**, account for roughly 74.5% of the total revenue, as per data from the USDA. Notable online food retailers operating in Germany include **Amazon**, **Getnow**, and **Picnic**.

Food service industry

- The food service industry represents a substantial market, with sales reaching USD 91.3 billion in 2023, as reported by the German Hotel and Restaurant Association (DEHOGA).
 - The German food service trade relies primarily on two distribution channels: cash-and-carry wholesalers and specialised distributors.
- Cash-and-carry wholesalers operate large retail outlets that offer a wide range of food and non-food products, catering to retailers, restaurants, and other food service providers.
 - Specialised distributors—equipped with dry and cold storage facilities and refrigerated and frozen transport—source goods from processing companies, importers, and international exporters.
- To ensure nationwide coverage, regional distributors collaborate in associations such as [Intergast](#) and [Service-Bund](#). Several of these distributors host biannual or annual in-house food exhibitions, presenting suppliers with opportunities to display their products to potential clients. These events serve as valuable entry points for foreign suppliers into the German food service sector.
 - Prominent international trade shows, including Anuga and Internorga, hold significant prestige and attract a global audience within the food industry.
 - A significant portion of the institutional food service market is serviced by catering companies, with Compass, Aramark, Sodexo, Klüh, and Apetito among the leading firms in Germany, providing catering services to corporate restaurants, healthcare facilities, retirement communities, educational institutions, and universities.

06 Key brand tie-ups

Several international brands are expanding into the German/EU market through strategic partnerships with food service providers, retailers, and local manufacturers:

► June 2020



Beyond Meat, entered into a co-manufacturing agreement with **Zandbergen**. The state-of-the-art facility owned and operated by Zandbergen will produce the Beyond Burger® and Beyond Sausage® and is intended to allow for more efficient distribution of Beyond Meat's products across Europe, the Middle East and Africa (EMEA). Beyond meat also entered into an agreement with **REWE** stores (1600 stores), one of the leading retailers in the country from 2023.

► August 2022



Burger King Germany announced a collaboration with **The Vegetarian Butcher** in August 2022, which saw its plant-based options more than double. The chain now offers a meat-free version of almost every item on the menu. In August 2024, a company employee said that one in five Whoppers sold in Germany was plant-based.

► June 2024



Redefine Meat, founded in Israel, launched its entire chilled range at Germany's largest online vegan retailer, **Velivory**, which also delivers to Austria. They have already seen a highly successful food service launch in the DACH region (Germany, Austria, and Switzerland), with its products now available at over 700 restaurants, hotels, and more through **Giraudi Meats**.

► April 2025



The **Vegan Food Group (VFG)** is introducing **JUST EGG** to the UK and EU markets for the first time, having secured exclusive rights for its manufacturing and distribution across Europe. To launch the joint venture, VFG is initially investing £5 million to establish a fully automated production line for plant-based egg alternatives at its production site in Lüneburg, Lower Saxony. This will make it one of the largest facilities for plant-based products in Europe.

► Nov 2025



TINDLE Foods, a company specializing in plant-based meat, has shifted its business strategy. The new focus is on private-label products within the European market, following the divestment of its operations in the United States.

07 Key distributors, manufacturers, and retailers



Zandbergen, a production partner based in the Netherlands, serves as the primary manufacturer of Beyond Meat products for the European market, including Germany.



Giraudi Meats, renowned for its exclusive, high-end meat offerings to Europe's food services sector, maintains a presence in over 30 countries, collaborating with more than 300 meat distributors and wholesalers. They manage pan-European sales, marketing, and distribution for their partner brands.



Genuport Trade GmbH, a leading importer and distributor of foods in Germany, sources well-established food brands from over 20 countries and manages their marketing and distribution within Germany.



GV Food Union is a food service company that caters to the catering, communal catering, and hotel industries. Their core objective is to foster and enhance collaboration between wholesalers and suppliers. Additionally, GV Food Union GmbH functions as a significant marketing partner for manufacturers.



Delimondo Handels GmbH & Co. KG (formerly Horace M. Ostwald e.K.) has specialized in importing select gourmet foods since 1959, serving clientele that includes leading five-star hotels, catering services, fine food stores, and other establishments.



BOS Food is a company that provides upscale and Michelin-starred restaurants with raw materials.



Intergast is a network of 40 medium-sized retailers operating wholesale markets across Germany, Austria, Switzerland, and Luxembourg at over 150 locations.



Servicebund is a group of wholesalers specializing in distributing a diverse range of food products. With numerous locations throughout Germany, Servicebund provides support to chefs at both national and local levels.



REWE, with over 3,800 stores, is a prominent food retail company in Germany.

SCHWARZ

The **Schwarz Group**, a multinational retail entity, operates stores in Germany under the Lidl and Kaufland brands, holding the distinction of being the largest retailer in Europe and the fourth-largest worldwide.



Aldi, a supermarket chain with a presence in Germany, most of the EU, Australia, the UK, and the U.S., has approximately 4,100 stores in Germany.



The **EDEKA group** is the largest German supermarket corporation, encompassing 4,100 stores that include supermarkets, hypermarkets, discount stores, and cash-and-carry stores. Their product range includes fruits, vegetables, meat, sausage, cheese, delicatessen items, fish products, juices, and frozen foods.

08 Regulatory overview

Legislative authority / Regulatory body

Several national and EU regulations regarding the import of food apply to Germany.

All EU member states accept the ‘Community acquis,’ i.e., the entire body of EU laws and obligations associated with the treaties and international agreements to which the EU is a party. EU Member states share a customs union, a single market where goods can move freely, a common trade policy, and a common agricultural and fisheries policy.

Three institutions are involved in developing policies and passing legislation that applies throughout the EU: the European Commission (EC), the Council of the European Union, and the European Parliament.

The European Food Safety Authority (EFSA) is responsible for providing scientific advice to legislators on matters related to food safety.

The Federal Ministry of Food and Agriculture and the Federal Office of Consumer Protection and Food Safety oversee the enforcement of food safety regulations in Germany.

Food law

The General Food Law [Regulation 178/2002](#)

Labelling regulation

The Food Information to Consumers (FIC) [Regulation 1169/2011](#) is the primary legislation for food labelling in the EU. It applies to all pre-packaged food and drink products marketed in the EU, including those imported from outside the EU. However, the FIC regulation allows the 27 EU member states to deviate from European rules.

To assist food business operators in complying with the EU's food labelling rules, the European Commission released a [Notice on Questions and Answers on the Application of Regulation 1169/2011](#) on the Provision of Food Information to Consumers.

Plant-based meat and dairy products

Under current EU law, specific terms, including 'milk' and 'yoghurt,' cannot be used for plant-based dairy, even if they are accompanied by qualifiers such as 'plant-based' or 'vegan.' This decision was confirmed in a [court ruling](#) from 2017. As of June 2025, the EC has put forward a [proposal](#) with a list of 29 'meat' terms to ban their use in the marketing of plant-based alternatives.

The EU policymakers have entered into a provisional agreement to restrict the use of 31 animal-associated terms for plant-based products. These include species names such as 'chicken', 'beef', and 'pork', as well as meat-cut terminology such as 'breast', 'thigh', and 'drumstick'. Further specific rules may be applicable at the EU-member state level. The designations customary in each member state must be determined on a case-by-case basis.

Fermentation-derived and cultivated meat

Classified as novel food, novel fermentation-derived proteins and cultivated meat require pre-market authorisation per [the Novel Foods Regulation](#) (EU) 2015/2283.

EFSA has also released '[Guidance on the scientific requirements for an application for authorisation of a novel food in the context of Regulation \(EU\)2015/2283.](#)'

Genetically Modified Organism (GMO) regulation

Alternative protein products containing or consisting of a Genetically Modified Organism (GMO) are subject to [GMO Regulation 1829/2003](#). Foods produced from a GMO may only be placed on the EU market after prior authorisation by the EC. A GMO authorisation has an initial validity of 10 years and is renewable. GMO-specific monitoring and labelling obligations apply.

Import-export portal or services (if any)

The EU has launched a new portal, [Access2Markets](#), for exporters and importers to find detailed information on tariffs, rules of origin, product requirements, customs procedures and formalities, VAT/excise duties/sales taxes, trade barriers, and trade statistics.

Registration of business

Economic Operators Registration and Identification (EORI) number is a unique identifier assigned by EU customs authorities to businesses and individuals involved in import or export activities within the EU, essential for customs declarations and interactions with customs officials.

Tariff benefits

Since EU has adopted a 'Generalised System of Preferences' (GSP) for goods originating in India (India qualifies for the 'GSP Standard' category), there is a concessional rate of 5.5% (+Agricultural Component (EA)) applicable on goods being exported from India under the HSN. For the benefit to be available, various compliances (including certifications/declarations) will be necessary to prove the origin of the product is from India under the Rules of Origin as applicable to GSP. The standard tariff is 9% + EA.

United Kingdom



Second-largest economy within Europe and sixth-largest globally.

Population

69
million

Average age

40
years

Value of retail market for
plant-based foods in 2024
across categories

£898
million

Plant-based
meat sales
values in 2024

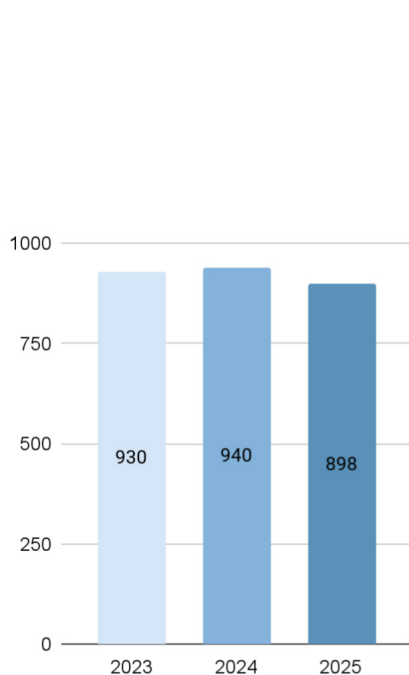
£33
million

01 Market size

Retail

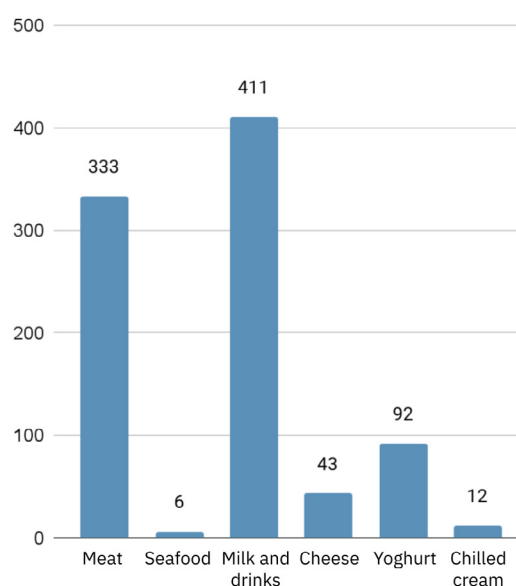
- The UK retail market for plant-based foods across six categories (meat, seafood, milk and drinks, cheese, yoghurt, and chilled cream) was valued at £898 million in 2024. Sales value has dropped by 4.1% in 2024 over 2023.
- Of this, plant-based meat accounted for 37% of plant-based sales value with a sale of £33 million in 2024. This is a decrease of 9.7% compared to the previous year and of 15.1% compared to two years prior.
- Private-label plant-based meat products account for only a small proportion of overall sales value, at around 13%.

Plant-based food sales value in £ millions



Sales report was based on three 52-week periods ending in late January each year, rather than the calendar years.

Plant-based food sales value by category in the UK - 2025 (£ millions)



02 Consumer profile and demand

- [1.8% of Brits identify as vegan, 5.4% vegetarian, 2.2% pescetarian and 31.2% flexitarians.](#)
- In 2024, 31.6% of British households bought plant-based meat alternatives, with 13% purchasing plant-based meat six or more times in the year.
- [GFI Europe's consumer study](#) in

collaboration with HarrisX found that 38% of UK consumers want to eat more plant-based foods, and 33% want to eat less animal meat and dairy. 20% want to reduce consumption of both meat and dairy.

Household purchase patterns for plant-based meat in the UK, 2022-2024

UK	% buying at least once per year			% buying 6 or more times per year			% buying 12 or more times per year			% of sales value from discounter stores		
	2022	2023	2024	2022	2023	2024	2022	2023	2024	2022	2023	2024
Plant-based meat	38.7%	35.4%	31.6%	16.4%	14.9%	13.2%	10.4%	9.5%	8.6%	9.8%	11.5%	11.8%

Data source: NIQ Homescan Consumer Panel. Data is nationally representative of the household population in the UK. The data covers 'Take Home' shopping and comes from a sample of 30,000 households. Data covers "plant-based meat substitutes."

03 Product formats in the market

Contribution to [sales volume](#) of plant-based meat in 2024

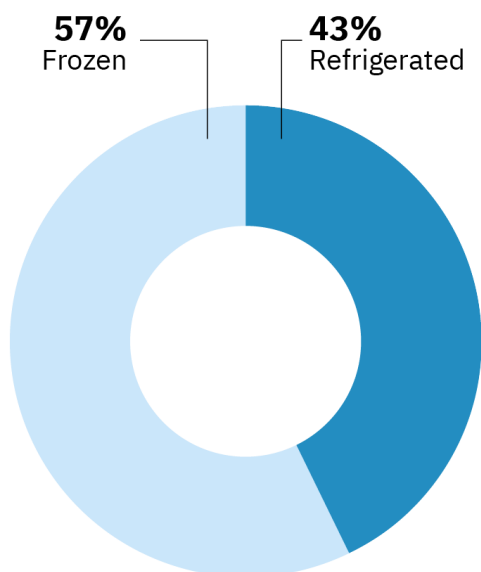
By protein type

- Beef : **28%** of sales
- Chicken: **31%** of sales
- Pork/Ham : **37%** of sales

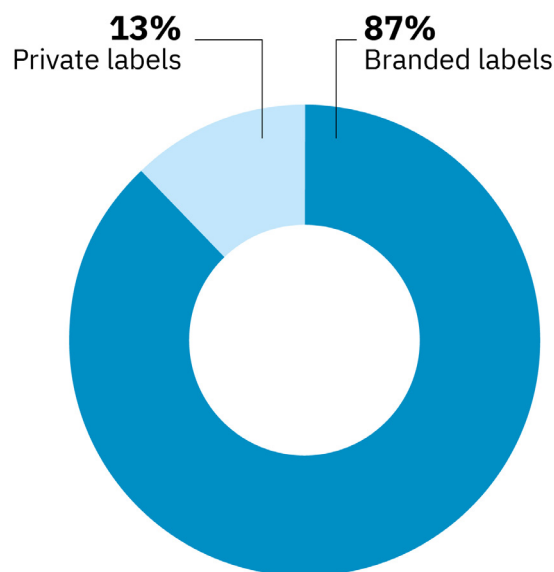
By format (as a percentage of the overall sales volume of plant-based meat):

- Sausages: Comprised **22%** of sales
- Ingredients: Products intended for incorporation into other dishes, including pieces and mince, made up **23%** of sales
- Center plate (breaded/coated): **12%** of sales
- Burgers: **11%** of sales

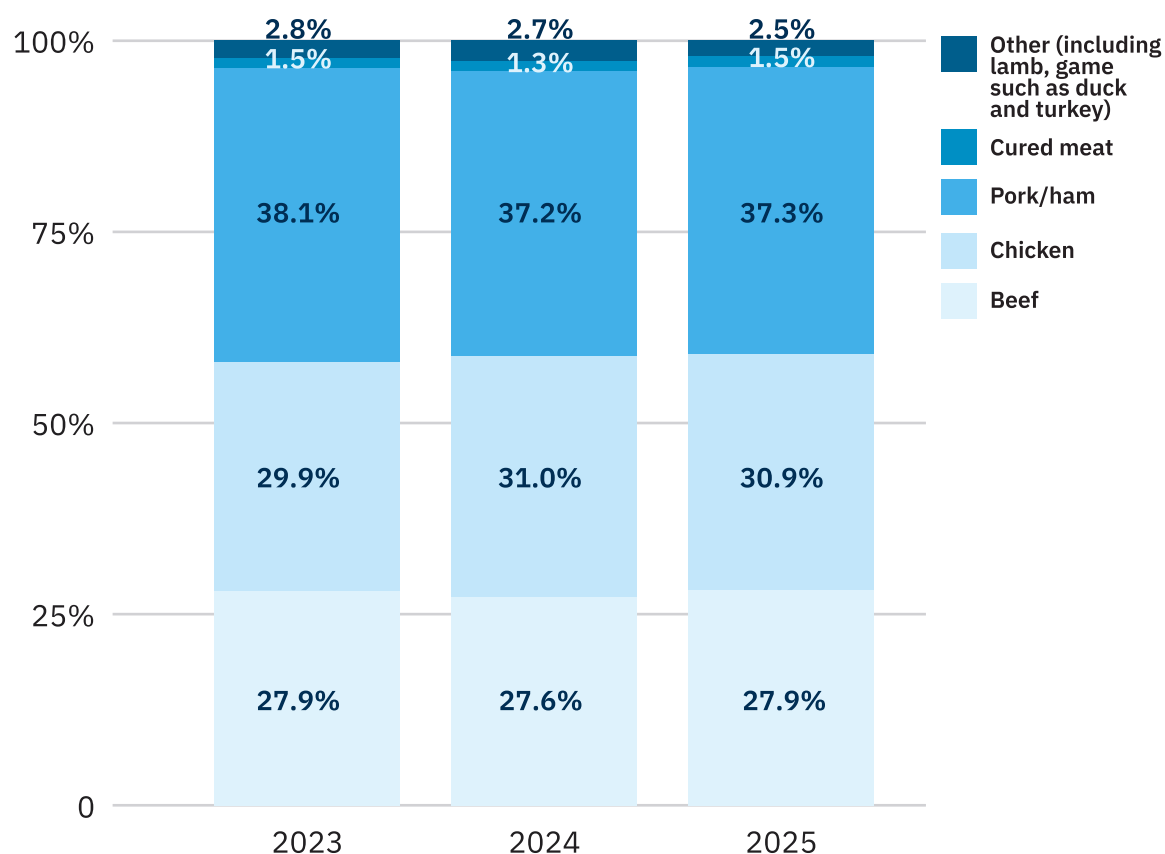
By storage condition



Branded vs private labels (on the basis of sales volume of plant-based meat)

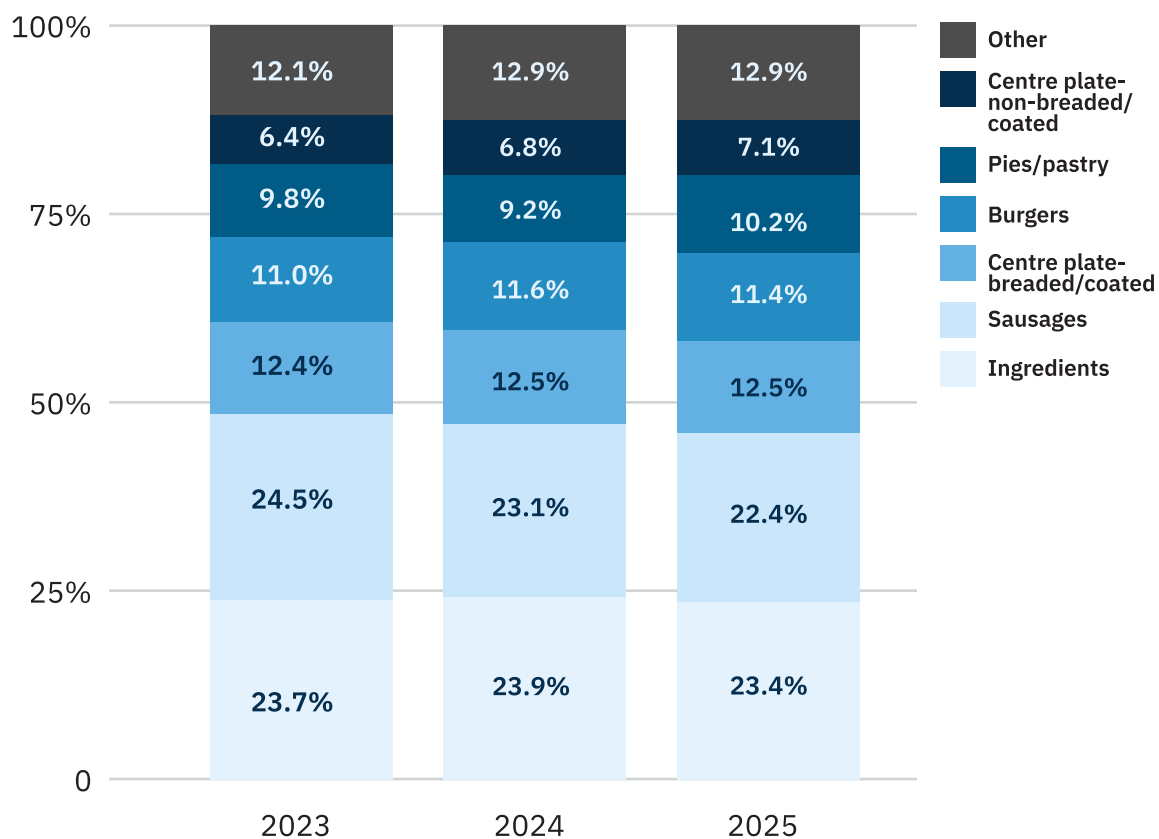


UK plant-based meat sales by type, 2023-2025
(% of sales volume)



Sales report was based on three 52-week periods ending in late January each year, rather than the calendar years.

UK plant-based meat sales by format, 2023-2025 (% of sales volume)



Sales report was based on three 52-week periods ending in late January each year, rather than the calendar years.

04 Key players in the market

- Some of the popular brands include **Meatless Farms, Cauldron, Garden**

Gourmet, Amy's Kitchen, Impossible Foods, and Morning Star.

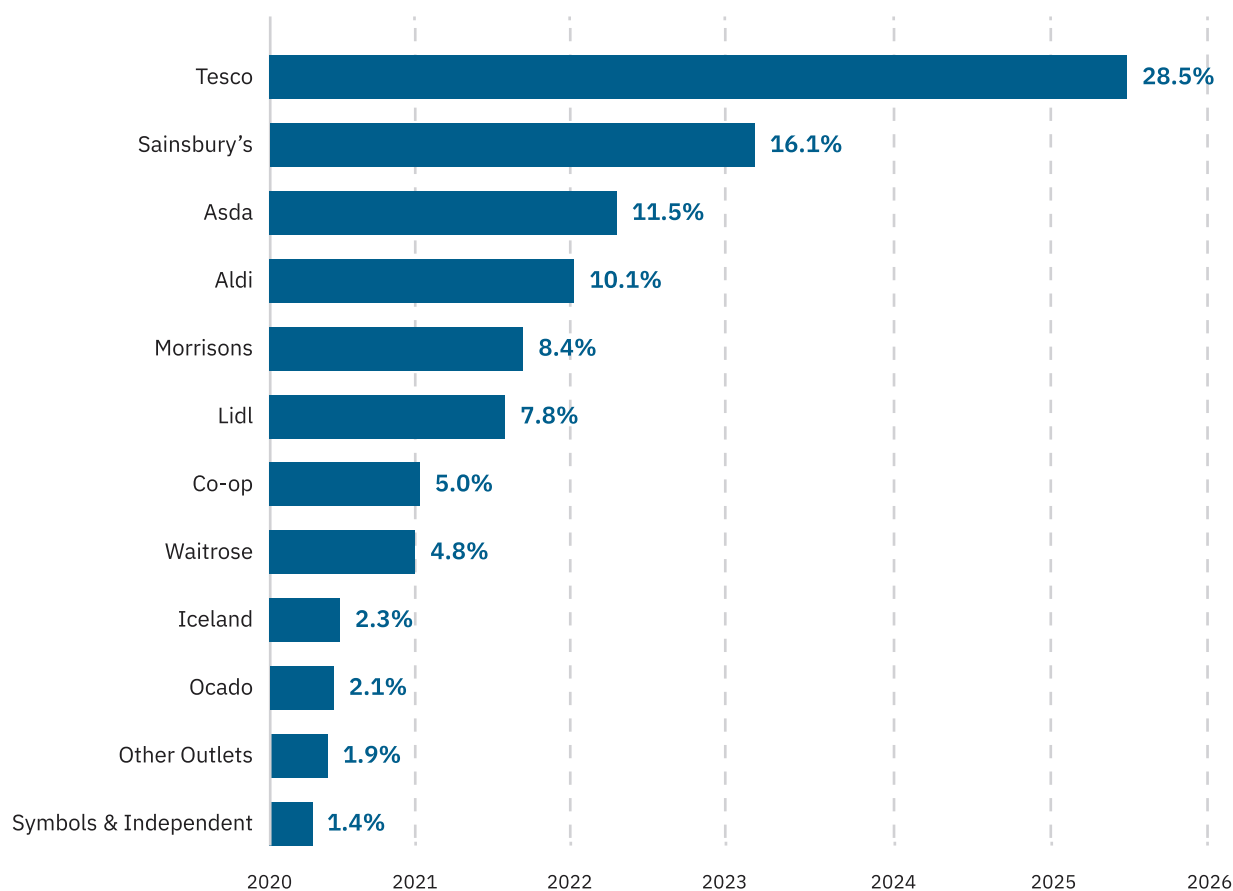
05 Key channels

Retail

There are more than 87,000 grocery stores in the UK.

- Key distribution channels within the UK food and grocery retail market include hypermarkets, supermarkets, hard discounters (retail businesses that offer a limited selection of products, primarily private-label brands, at significantly lower prices than traditional discount retailers), convenience stores, gas stations, and speciality food and beverage (F&B) retailers. Hypermarkets, supermarkets, and hard discounters hold a dominant position.
- The leading players in the UK food and grocery retailing market are **Tesco**, **Sainsbury's**, **ASDA**, **Aldi**, **Morrisons**, **Lidl**, **Co-op**, **Marks & Spencer**, **Waitrose & Partners**, and **Iceland**, among others.

Grocery Market Share (12 weeks ending)



Food service industry

- The UK food and beverage service industry is highly fragmented, with [over 362,679 diverse outlets](#). These include restaurants, mobile food services (including takeaway shops and food stands), pubs, bars, clubs, event catering, and other food service activities. Hotels, pubs, and restaurants account for 1/3rd of these outlets.
- Some of the key [food service companies](#) in the UK are **Greene King**, **Stonegate Group**, **JW Wetherspoon**, and **Fortress Investment Group**.

06 Key brand tie-ups

► Nov 2018 to Sept 2022



Beyond Meat, has established retail partnerships with major UK supermarkets, including **Tesco**, **Sainsbury's**, **Asda**, **Ocado**, **Waitrose**, and **Morrisons**. Beyond Meat has partnered with **Tortilla** and **McDonald's** in the food service industry.

► May 2022



Impossible™ products have been introduced at over 250 **Hungry Horse** public houses owned by **Greene King**, a prominent UK pub and brewing company.

► July 2023



BVeg Foods, a leading plant-based meat manufacturer from India, exports frozen vegan beef chunks to the UK.

07 Key distributors, manufacturers, and retailers



Bidfood UK, a leading food distributor in the UK, holds a dominant position in the food service industry with annual sales exceeding £1.3 billion. Headquartered in London, they provide services to restaurants, healthcare and educational institutions, and hospitality establishments.



Brakes Group, a significant food service distributor operating within the UK, has an annual turnover surpassing £3.5 billion. They serve a clientele comprising independent and multi-unit restaurants, healthcare and hospitality entities, and various other food service businesses. With a focus on sustainability practices and the provision of high-quality private-label products, Brakes Group is well-positioned for placing alternative proteins across the British market.



Bestway Wholesale's extensive customer base ranges from independent restaurants to national chains and specialises in delivering customised solutions tailored to specific client requirements. Bestway's client portfolio includes prominent establishments such as Subway, illustrating its capacity to accommodate large-scale distribution demands.

BOOKER

Booker Group operates an extensive network of over 200 branches throughout the UK with a focus on providing supply chain solutions to convenience stores, catering services, and small businesses. Booker's collaborative association with Tesco demonstrates its capability to engage in partnerships with major retail chains.



JJ Food Service offers a comprehensive catalogue of over 30,000 products catering to restaurants, schools, and care homes.



Castell Howell Foods stands as a major distributor to restaurants, schools, and retailers situated in Wales and the South West region. The company is recognised for its dedication to local sourcing, sustainable practices, and the supply of high-quality products.

08 Regulatory overview

Legislative authority / Regulatory body

Food Standards Agency (FSA) and the Food Standards Scotland (FSS) and the Department for Environment, Food & Rural Affairs (DEFRA)

The UK continues to implement changes to its border control measures following its departure from the EU. With England, Wales, and Scotland—Great Britain (GB)—outside of the EU single market and customs union, exporters should ensure they are familiar with the GB requirements that may differ from the EU in certain areas. Northern Ireland (NI) remains within the EU single market and customs union, and exporters should familiarise themselves with the specific requirements for trade with or via this part of the UK. DEFRA is the competent authority for agri-food trade.

Food law

The General Food Law [Regulation 178/2002](#)

Labelling regulation

[Food Information Regulations 2014](#) is the primary legislation for food labelling.

Nutrition and health claim policy

[Retained Regulation \(EU\) No. 1169/2011](#) was incorporated into UK domestic law under the EU (Withdrawal) Act 2018 and sets out requirements for the provision of food information to consumers, including [the labelling of prepacked food and drink in the UK](#).

Plant-based meat and dairy products

Under the retained EU law, labelling, advertising and display of food shall not mislead consumers.

Some foods have ‘reserved descriptions,’ which you can only use if the food has a certain composition. For example, dairy terms—milk, cheese, butter, and yoghurt—are protected and must only refer to products derived from animals.

Fermentation-derived and cultivated meat

Cultivated meat and fermentation-derived proteins require pre-market authorisation by the FSA and FSS, with a decision to grant market access taken by the GB ministers. Most products are expected to be regulated as novel foods under assimilated [Regulation \(EU\) 2015/2283](#). Further information is available on the [FSA’s website](#).

Import-export portal or services (if any)

The UK’s enforcement system is based on the Home Authority Principle. Every UK business, including importers, can call on their local Trading Standards office for advice, guidance and information on consumer protection, trading standards, food safety, labelling and composition rules, and regulatory best seven practices. There are over 70 such regional [Trading Standards offices](#) located throughout the UK.

Exporters are advised to encourage their UK importer to liaise with their local Trading Standards office when introducing products to the UK market. The Home Authority Principle aims to provide advice and support to UK businesses to ‘get it right the first time.’ This local government provision is beneficial in seeking to resolve composition and labelling issues.

Food Safety Agency—[Import and Exports](#)

Registration of business

General advice on import procedures can be found here: [Import goods into the UK: step by step](#)

Tariff benefits

India benefits under the Developing Countries Trading Scheme (DCTS) where the concessional rate of tariff is 4.5%. For availing the benefits, the goods are required to meet the conditions specified under the Customs (Origin of Chargeable Goods: Developing Countries Trading Scheme) Regulations 2023, which in turn provides for 'important stage of manufacture condition.' Such conditions are to be proven by way of certificates or declarations from the notified agencies. India qualifies as a Least Developed Country (LDC) under the DCTS. The standard rate of tariff is 8%.

United States

The largest economy in the world with the highest per-capita meat consumption

Population

350
million

Average age

39
years

Plant-based food retail market in the US in 2024 (USD)

8.1
billion

Sales of plant-based meat and seafood in 2024 (USD)

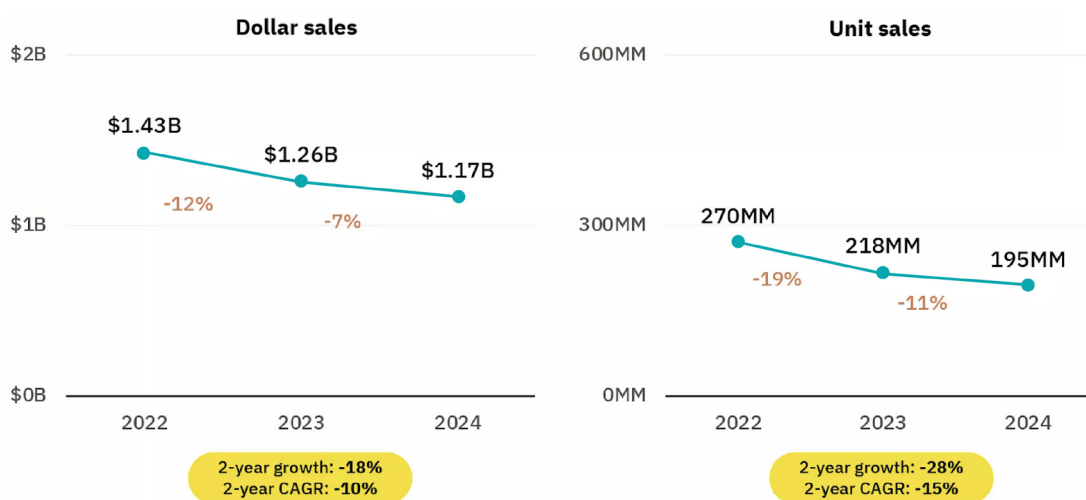
1.2
billion

01 Market size

Retail

- The plant-based food retail market in the U.S. was valued at [USD 8.1 billion in 2024](#), with sales of plant-based meat and seafood at USD 1.2 billion.
- In 2024, plant-based meat and seafood’s share was 1.7% of total retail packaged meat dollar sales or 0.8% of the total meat category (including random-weight meat). In the natural channel (grocery and retail market focused on natural, organic, and speciality products), plant-based meat and seafood’s market share of packaged meat dollar sales was 8%, estimated to be over 4% of total meat sales (including random weight).
- Following a period of record growth until 2021, the plant-based meat and seafood sector experienced declines in subsequent years.

Plant-based meat and seafood market, U.S. retail (2022-2024)



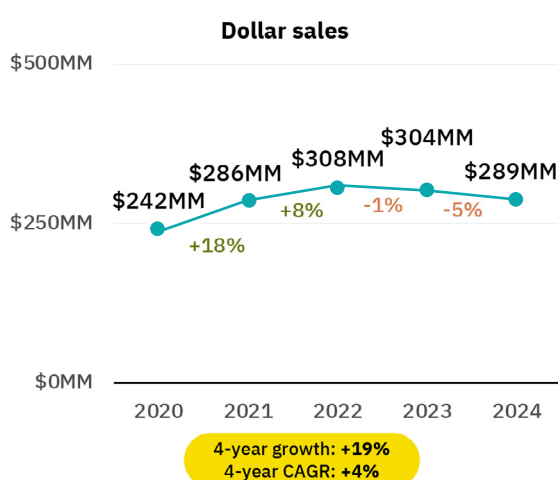
Sales data note: The data presented in this graph is based on custom GFI and PBFA plant-based categories that were created by refining standard SPINS categories. Due to the custom nature of these categories, the presented data will not align with standard SPINS categories.

Source: Total market = SPINS Natural Expanded Channel + SPINS Conventional Multi Outlet Channel + SPINS Convenience Channel (powered by Circana) | 52 Weeks Ending 12-1-2024

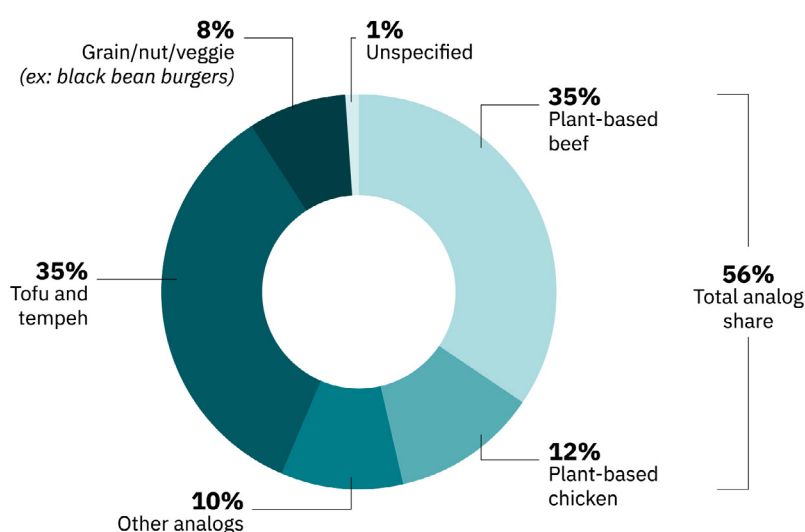
Food service

- The 2024 dollar sales for plant-based protein from broadline distributors, which include meat alternatives, grain/nut/veggie alternatives, and tofu/tempeh, was USD 289 million, representing a drop of 5% over the previous year.
- Plant-based meat alternatives accounted for 56% of plant-based protein volume in 2024.

Plant-based proteins market, U.S. broadline distributor food service sales (2020-2024)



Share of plant-based protein pound sales from U.S. broadline distributors (2024)



Source: Circana/SupplyTrack, Product Class: Plant-based proteins (analogous meat alternatives, grain/nut/veggie alternatives, tofu/tempeh). Dollar and pound sales are 12 months ending December 2024 vs. four prior years.

02 Consumer profile and demand

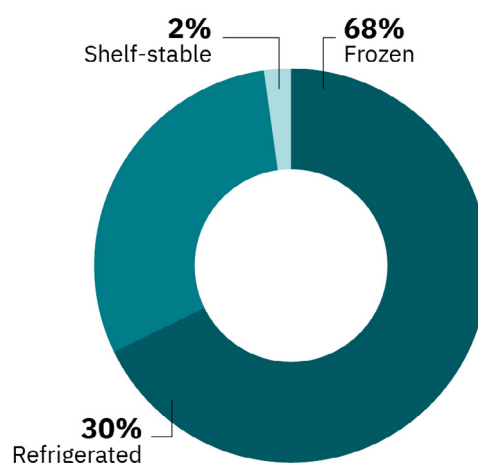
- A December 2024 poll conducted by the Good Food Institute and Morning Consult indicates that 4% of consumers in the U.S. adhere to a vegetarian diet, and an additional 4% follow vegan diets and 16% flexitarian.
- According to an AP-NORC survey, [43% of consumers](#) have reduced their meat consumption.
- Health is consistently cited as a primary reason for reduced meat consumption, with [57% of consumers](#) claiming it contributes ‘a lot’ or ‘some’ to their decision. Similarly, the AP-NORC survey found that [50% of consumers](#) identified health as their top reason for reducing meat consumption when presented with options including health, cost, environment, and taste.
- In recent years, protein has emerged as an increasingly significant factor influencing food choices, potentially contributing to the increase in meat consumption. In 2023, ‘high protein’ surpassed ‘low-fat’ and ‘low-carb’ in Google search trends for the first time. [Research by GFI](#) in 2025 found that plant-based meat consumers are more attentive to health goals when choosing meat than non-consumers, that both plant-based meat consumers and non-consumers think of plant-based meat as healthy, but also that they tend to underestimate the protein content (as well as other nutrients like fibre), indicating short-term marketing-driven opportunities for growth among existing consumers.
- Plant-based meat and seafood products were purchased by [13% of households](#) in 2024. Of those households, 63% made multiple purchases within the category.
- 95% of plant-based meat consumers also reported consuming conventional meat.

03 Product formats in the market

By storage condition

Contribution to [sales value in 2024](#)

- Frozen products account for **68%** of the value share
- Refrigerated products - **30%** of the value share
- Shelf-stable products - **2%** of the value share



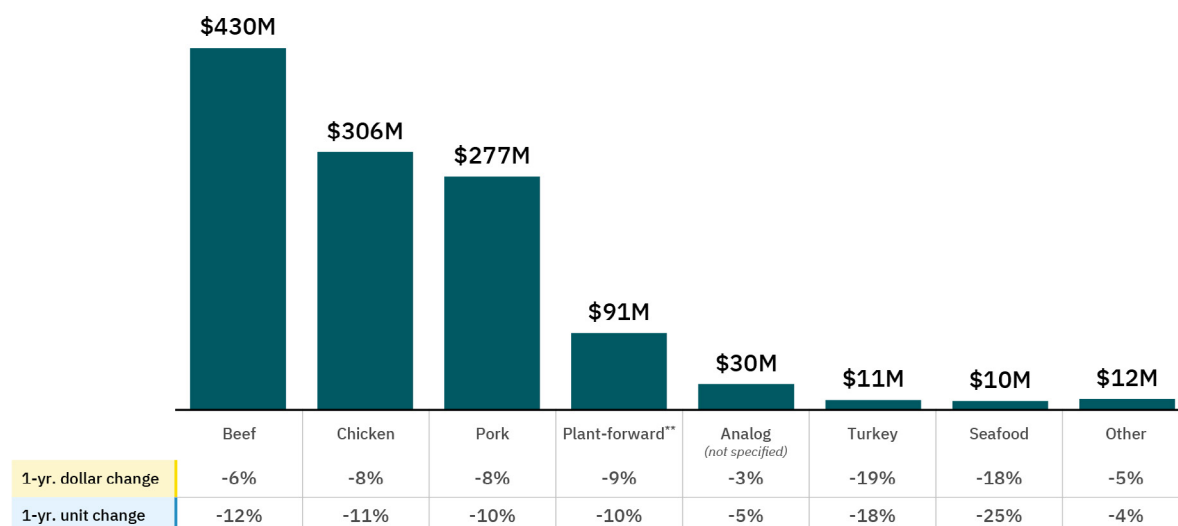
By protein type

- Beef
- Chicken
- Pork

By format

- Patties
- Nuggets, tenders, and wings
- Ground products
- Hotdogs, brats, and sausages
- Breakfast-style products and patties
- Driven by [consumer demand](#) for diverse, culturally reflective foods, ethnic-flavoured meat substitutes comprise **21%** of new product launches, as reported by Innova Market Insights. These offerings, drawing inspiration from global gastronomy, include preparations such as Korean BBQ, bulgogi, gochujang, Moroccan falafel, Japanese teriyaki, birria tacos, and Italian sausage, thereby providing authentic international culinary experiences.
- A marked increase is observed in the launch of flavoured meat substitutes. Products incorporating vegetable flavours, including sweet potato, chickpea, and black bean, are enhanced with spices and seeds such as chilli, chipotle, ginger, and smoked barbecue. Smoked, spicy, barbecue, mushroom, and Italian flavours are the five predominant flavour profiles within the meat substitutes market.

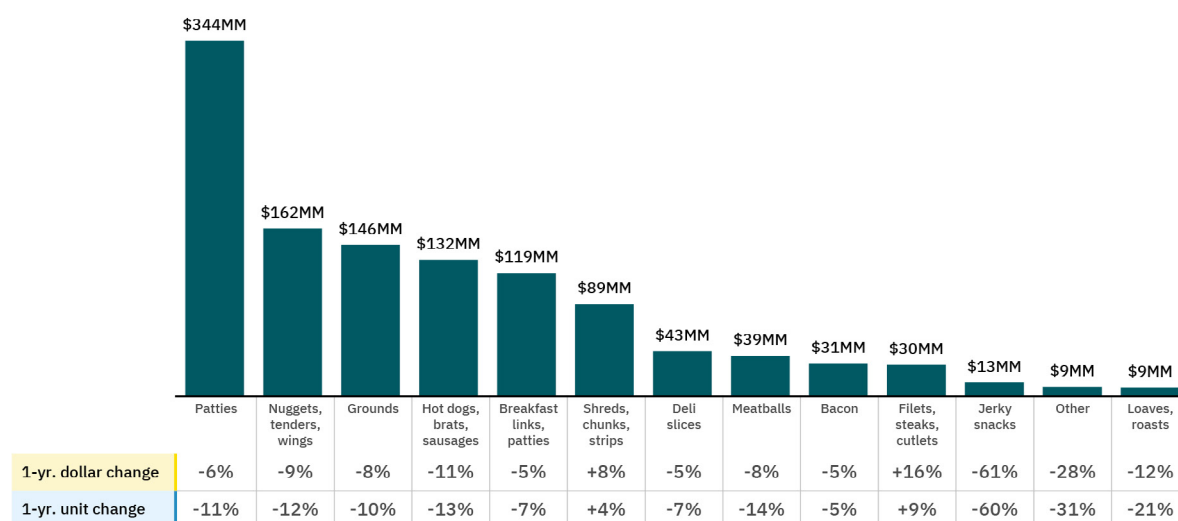
Plant-based meat and seafood sales by animal type (2024)



Sales data note: The data presented in this graph is based on custom GFI and PBFA 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. **Items not specifically attempting to replicate the taste, texture, appearance, and cooking experience of conventional meat. These items often call out a whole vegetable or leading vegetable ingredient in their description.

Source: Total market = SPINS Natural Expanded Channel + SPINS Conventional Multi Outlet Channel + SPINS Convenience Channel (powered by Circana) | 52 Weeks Ending 12-1-2024

Plant-based meat and seafood sales by format (2024)



Sales data note: The data presented in this graph is based on custom GFI and PBFA 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: Total market = SPINS Natural Expanded Channel + SPINS Conventional Multi Outlet Channel + SPINS Convenience Channel (powered by Circana) | 52 Weeks Ending 12-1-2024

04 Key players in the market

- Some of the key players in the plant-based meat industry in the U.S. are **Beyond Meat**, **Impossible Foods Inc.**, **Maple Leaf Foods (Field Roast & Maple Leaf)**, **Conagra, Inc. (Gardein Protein International)**, **Kellogg NA Co. (MorningStar Farms)**, **Amy's Kitchen, Inc.**, **Tofurky**, **Kraft Foods, Inc.**, **Lightlife Foods, Inc.**, **Trader Joe's**, **Yves Veggie Cuisine (The Hain-Celestial Canada, ULC)**, **Eat JUST Inc.**, **No Evil Foods**, **COnga**, **Quorn**, and **MorningStar Farms**.
- In addition to emerging players, established conventional meat producers such as **JBS**, **Tyson**, **Cargill**, and **Smithfield** are participating in the plant-based meat sector through strategic investments, acquisitions, and partnerships. Prominent Consumer Packaged Goods (CPG) companies, including **Pepsico**, **Nestle**, **Kraft Heinz**, **General Mills**, **AB InBev**, and **Danone**, are also exploring the industry.

In September 2022, the Agricultural and Processed Food Products Export Development Authority (APEDA) of India announced the inaugural shipment of plant-based meat to the U.S. by the brand **Greenest**. The consignment comprised plant-based mini samosas, hot and spicy strips, momos, spring rolls, nuggets, grilled patties, and various other plant-based products, originating from Gujarat, India. Subsequently, in June 2023, **Wakao Foods** exported a 13-tonne container of jackfruit-based meat products to the U.S., marking the largest Indian plant-based meat shipment to the U.S. at that time. Furthermore, **GoodDot**, another Indian alternative protein brand, has entered the U.S. market through a partnership with **ADF Foods**, operating under the packaged Indian foods brand, Ashoka. Internationally, GoodDot is collaborating with **Just Vegan**, a New York-headquartered franchise with operations across the Middle East, the U.S., and Southeast Asia, to develop a new line of plant-based products in Dubai.

05 Key channels

Retail

- As of June 2024, the U.S. has [305,156 grocery stores](#). The grocery market is immensely competitive, featuring diverse retail chains such as supermarkets, speciality food stores, convenience stores, warehouse clubs (stores with an annual membership fee that sells a limited selection of goods, typically in bulk, at discounted prices), discount grocers, natural and organic stores, ethnic and international markets, and online grocery retailers.
- The four preeminent retailers in the U.S. market are **Walmart**, **Kroger**, **Costco**, and **Albertsons Companies**. Walmart leads by virtue of its expansive store network and substantial revenue. Kroger, with its numerous subsidiary brands, occupies the second position. Costco distinguishes itself through its membership-based warehouse model and bulk product offerings. Albertsons Companies, which operates multiple well-established brands including Safeway and Vons, completes the list of the top four. These retailers have significant influence in the U.S. grocery market via their broad product assortments, competitive pricing strategies, and considerable market presence.
- Retail brands with an emphasis on fresh produce and natural or organic formats include **Whole Foods**, **The Fresh Market**, **Raley's**, **Ingles Markets**, **Sprouts Farmers Market**, **Giant Eagle**, **Wegmans**, and **Meijer Inc.**
- Discount grocery formats include **Save A Lot**, **Aldi**, and **Dollar General**.
- The U.S. e-grocery market saw significant growth in 2025, with monthly sales increasing by over 30% compared to 2024. Closing the year, the online portion of total grocery spending [reached 19%](#). Currently, the most widely used online grocery platforms are **Amazon** and **Walmart**, followed by **Walgreens** and **Kroger**.

Food service

- [The North America food service market](#) is projected to grow from an estimated USD 1.13 trillion in 2025 to USD 1.99 trillion by 2030, exhibiting a CAGR of 11.89% between 2025-2030.
- Consumer preferences are demonstrating a marked shift towards dining options that prioritise health and sustainability. Industry data indicates that 38% of consumers express a preference for restaurants that offer locally sourced foods, while over 30% actively seek establishments that provide sustainably or organically produced meals.
- Sales of plant-based meat within the hotel/restaurant/café (HORECA) sector led the market in the US, accounting for 53.4% of revenue in 2024. Quick service restaurants (QSRs) continue to hold a dominant position in the U.S. food service market, holding ~50% of the market share in 2024, followed by full-service establishments, cafes, bars, and cloud kitchens.

06 Key brand tie-ups

► Sept 2022



Greenest Foods, an Indian plant protein startup, has collaborated with **Wholesome Foods** for export to the U.S.

► April 2023



GoodDot has entered the U.S. market via ethnic Indian stores and has partnered with **ADF Foods** to export its plant-based meat products to the U.S. and other international markets.

07 Key distributors, manufacturers, and retailers



Sysco Corporation, a leading distributor within the food service industry generates annual revenues exceeding USD 68 billion.

- Established in 1969 and headquartered in Houston, the company's operations extend to 90 countries, serving over 700,000 clients through 333 distribution facilities.
 - Sysco primarily services restaurants, healthcare institutions, educational facilities, and lodging establishments.
-



US Foods, headquartered in Rosemont, Illinois, serves over 300,000 customers and maintains more than 70 distribution facilities.

- US Foods caters to independent and multi-unit restaurants, healthcare and hospitality entities, and other food service businesses.
 - The company is recognised for its premium private-label products and commitment to sustainable practices, coupled with a vast network of over 6,000 suppliers, making it well-suited to partner with major entities entering the U.S. market.
-



Performance Food Group (PFG) headquartered in Richmond, Virginia, is supported by over 150 distribution centres nationwide.

- The company serves a significant clientele of 300,000 customers, ranging from independent restaurants to national chains, and provides bespoke solutions tailored to client specifications.
 - PFG's client portfolio includes major establishments such as KFC, reflecting its capability to manage large-scale distribution requirements.
-



McLane Company serves over 110,000 clients, operating more than 80 distribution centres throughout the U.S.

- The company specialises in grocery and food service supply chain solutions for convenience stores, mass merchants, and drug stores.
- McLane manages extensive distribution channels through its established partnership with Walmart.



Gordon Food Service (GFS) provides services to over 100,000 customers across the U.S. and Canada.

- The company operates more than 28 distribution centres, focusing on the requirements of restaurants, educational institutions, and healthcare facilities.



The H.T. Hackney Co. serves more than 20,000 customers through 28 distribution centres across 22 states.

- The company specialises in convenience store distribution, offering a diverse array of products, including food, beverages, and non-food items.
- Hackney's extensive experience and client-focused approach have resulted in collaborations with notable convenience store chains such as Circle K.



KeHE Distributors is a leading distributor of natural and organic foods.

- KeHE serves over 30,000 retail clients throughout the U.S. and Canada through 18 distribution centres.
- The company is distinguished by its emphasis on sustainable practices and its dedication to natural, organic, and speciality products.
- KeHE's notable clientele includes prominent retailers like Whole Foods Market, expanding into the health-conscious consumer market.

Other prominent entities within this sector include **Ben E. Keith Products, Shamrock Foods, Spartan Nash, UNFI, C&S Wholesale Grocers, Coremark Holding Company,** and **Cheney Brothers.**

08 Regulatory overview

Legislative authority / Regulatory body

United States Department of Health and Human Services Food and Drug Administration (HHS-FDA) / United States Department of Agriculture Food Safety and Inspection Service (USDA-FSIS)

Food law

Title 21 of the Code of Federal Regulations (CFR), i.e., [Title 21 - Food and Drugs](#)

[2022 Food Code](#)

Labelling regulation

[21 CFR Part 101 - Food Labelling](#)

[Guidance for Industry: A Food Labeling Guide](#)

Plant-based meat and dairy products

[Draft Guidance for Industry: Labeling of Plant-Based Alternatives to Animal-Derived Foods \(January 2025\)](#)

The guidelines are not intended for implementation. Contains nonbinding recommendations.

Fermentation-derived and cultivated meat

The Federal Drugs and Cosmetics Act (FDCA) provides that food additives—defined broadly—are subject to pre-market review and approval by the FDA. However, the FDCA excludes from the definition of ‘food additive’ substances that are recognised by qualified experts as being safe under the conditions of their intended use, i.e., ‘Generally Recognized as Safe’ (GRAS). Such substances need not obtain pre-market approval.

Under the GRAS notification program, a person may voluntarily inform the FDA that the use of a substance is GRAS. A notification describes the substance, the conditions of use, and

the basis for the GRAS determination. Once it has received the notification, the FDA may respond with a letter stating that it does not question the notifier's GRAS determination. Such a letter may identify potential issues concerning the substance's labelling or use in certain foods. Alternatively, the FDA may respond with a letter stating that the notice does not provide a sufficient basis for a GRAS determination.

Smart proteins using novel substances that are not GRAS may be subject to the FDA's rigorous pre-market review and approval process.

In addition to pre-existing regulations with which APPs must comply, the FDA regulates [human food made with cultured animal cells](#) of livestock and poultry jointly with USDA-FSIS, following the [formal agreement](#) established in March 2019.

[Human Food Made with Cultured Animal Cells Inventory](#)

Genetically Modified Organism (GMO) regulation

As of January 1, 2022, food manufacturers, importers, and certain retailers must disclose foods that are bioengineered or whose ingredients are bioengineered, i.e., genetically modified. The standard defines 'bioengineered foods' as 'those that contain detectable genetic material that has been modified through certain lab techniques and cannot be created through conventional breeding or found in nature.' The required disclosure must be made through (1) text on the packaging, (2) the official USDA-approved symbol for bioengineered food, (3) a scannable link stating, 'Scan here for more food information,' or (4) an instruction that provides the consumer with a number to text for more information.

Some products, or their ingredients, may be derived from bioengineered foods but do not contain detectable modified

genetic material. Manufacturers, importers, and retailers may voluntarily disclose that these foods are derived from bioengineered foods, and the USDA has a separate label for those who wish to use them.

Import-Export portal or services (if any)

The FDA has put together [Imports & Exports Guidance Documents & Regulatory Information](#) containing nonbinding recommendations.

Registration of business

USFDA registration (with a U.S. agent)

Tariff benefits

At present, there are no trade agreements with the US, and India is currently not falling under the benefits of GSP (since 2019). Accordingly, the standard rate of duty is 6.4%. Further, an additional duty of 10% is applicable across the board under the International Emergency Economic Powers Act (IEEPA).

Australia

19th largest economy in the world with high per-capita meat consumption

Population

26
million

Average age

38
years

Plant-based
meat sales
value in FY23
across retail
and food service
sectors (AUD)

272.5
million

Increase compared
to FY20



47%

01 Market size

- In FY23, the Australian plant-based meat market reached a value of AUD 272.5 million across both retail and food service sectors, representing a 47% increase compared to FY20.
- Retail accounts for approximately AUD 149 million, while food service contributes AUD 124 million.
- Australian exports reached 142 tonnes in fiscal year 2023, with a value of AUD 4 million at a compound annual growth rate of 14%.

Australian plant-based meat market overview, FY19-FY23

	FY19	FY20	FY23	CAGR FY19-FY23	CAGR FY20-FY23
Consumption (\$m nominal)					
Retail	\$105.2	\$154.0	\$148.9	9.1%	-1.1%
Food service	\$35.0	\$31.0	\$123.6	37.1%	58.6%
Total	\$140.2	\$185.0	\$272.5	18.1%	13.8%

Australian exports (in AUD)

Exports	2019	2020	2023	CAGR
Volume of Exports (\$m nominal)	NA	\$2.7	\$4.0	14.0%
Volume of Exports (t)	NA	96	142	14.0%

Source: Deloitte Access Economics 2024

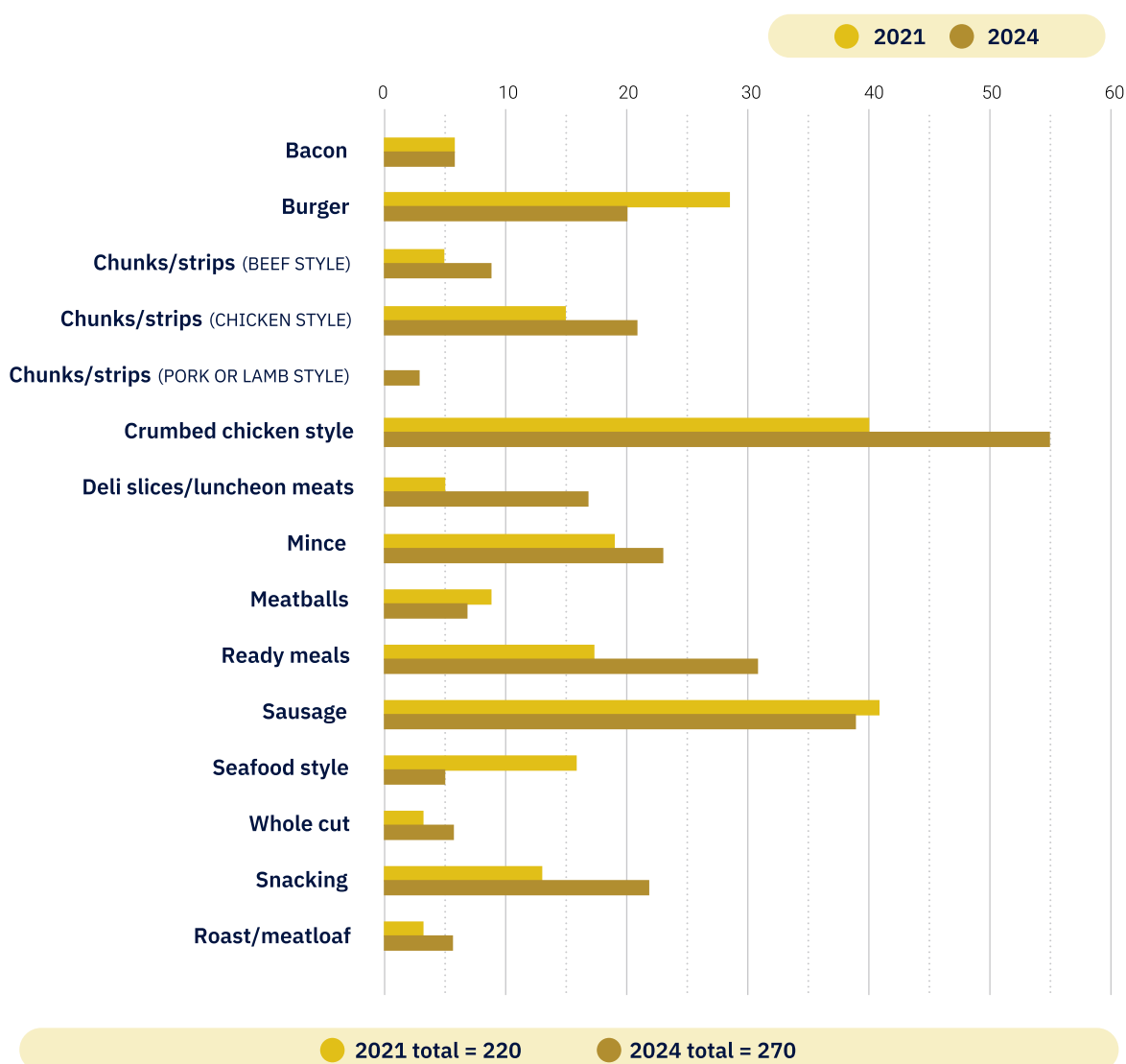
02 Consumer profile and demand

- [5.3% Australian people are vegetarian or vegan](#). People aged 30–49 years were more likely than any other age group to be vegetarian or vegan (7.3%).
- One in four (24.9% or 5.2 million) people aged 15 years and over were currently following a diet or eating pattern in 2023. Among people who were on a diet, the most common food avoidance diets were:
 - low or meat free (21.4%)
 - low or dairy/lactose free (4.8%).
- Almost one in ten people (9.2%, or 2.3 million) avoid certain foods for cultural, religious, or ethical reasons. The most commonly avoided foods are pork (5.9%), followed by beef (4.0%) and all meat (2.9%).

03 Product formats in the market

While burgers and sausages demonstrated strong performance in 2021, increasing demand for convenience has led to the emergence of formats such as snacks and finger foods, deli slices, and ready meals, of which **50%** come frozen. Versatile and functional products, including beef strips and chunks and whole-cut meats, are increasingly prevalent due to their adaptability in various culinary applications.

Formats of plant-based meat products:



04 Key players in the market

- A few major brands dominate the Australian plant-based meat market, but there has been a noticeable increase in domestic brands. Currently there are 22 Australian plant-based meat companies, a significant jump from 10 in 2019.
- Of the 292 plant-based meat products available at Australian retailers at the close of FY23, 63% were from Australian brands, an increase from 42% in FY20. 48% of the 292 were also manufactured domestically.
- International brands such as Beyond Meat, Impossible Foods, Fry Family Food, and Linda McCartney are also available in the Australian market.

05 Key channels

Retail

- The Australian grocery retail sector, valued at AUD 135 billion, is characterised by a highly concentrated market, where four principal retailers—**Woolworths**, **Coles**, **Aldi**, and **Metcash**—hold a collective 80% market share.
- Woolworths Group leads with 37% of the market share, followed by Coles with 28%, Aldi with 10%, and Metcash with 7%.
- **Metcash**, the nation's preeminent grocery wholesaler, encompasses retail brands such as **IGA**, **SupaIGA** (supermarkets), **IGA X-press** (convenience stores), **IGA Fresh**, **Foodland**, and **Friendly Grocer**.
- The independent sector features prominent regional operators, notably **Drakes** (South Australia and Queensland) and **Harris Farm Markets** (New South Wales and, more recently, Queensland).
- Other significant entities include **Australian United Retailers Limited (AURL)**, which operates nationally under the FoodWorks brand, and Costco. Department store **David Jones** also participates in the market through its premium food halls and standalone food stores.

Food service

- Quick-service restaurants (QSRs), such as **McDonald's** and **Domino's**, constitute approximately 40% of the total food service market in Australia and demonstrated a CAGR of 1.4% from 2015 to 2020.
- The second-largest channel within the Australian food service industry is full-service restaurants (FSRs), which represent a highly fragmented sector predominantly served by domestic brands.

06 Key brand tie-ups



Beak and Johnston, an Australian food processing company that specialises in chilled and frozen convenience foods, has partnered as the importer for **Impossible Foods** products in Australia. The partnership helped Impossible Foods' launch in the Australian market.

07 Key distributors, manufacturers, and retailers



Metcash, one of Australia's largest grocery distributors, provides a vast array of products, including groceries, liquor, and hardware, to over 10,000 independent retailers across the country.



Bidfood Australia, one of the largest food service distributors in the country, serves a diverse customer base including hotels, restaurants, schools, and hospitals with an extensive range of products from fresh produce to packaged goods.



Primo Foods, the largest manufacturer and distributor of small goods, providing a wide range of products from hams and salami to bacon and sausages, distributes across retail, food service, and export markets.



JBS Australia, the leading food distributor in Australia, specialises in meat products. It is a subsidiary of the global meat processing company JBS S.A. and supplies high-quality beef, lamb, and pork to both domestic and international markets.



Superior Food Services has a broad portfolio ranging from fresh produce to frozen goods and focuses on providing quality food products to the hospitality and food service industries.



About Life, a leading organic and natural food distributor, serves the health-conscious market through retail stores and partnerships with supermarkets and cafes. They are known for their sustainability ethos, distributing organic food, beverages, and eco-friendly products.

08 Regulatory overview

Legislative authority / Regulatory body

Food Standards Australia New Zealand (FSANZ) is responsible for setting standards that govern the content and labelling of foods sold in New Zealand and Australia. These standards also cover food composition, contaminants, and microbiological limits.

Local authorities then monitor compliance with Australia New Zealand Food Standards Code in Australia's States and Territories. Department of Agriculture, Fisheries and Forestry (DAFF) via the Imported Food Inspection Scheme (IFIS), inspects and samples food products imported to Australia.

In New Zealand, the Ministry for Primary Industries (MPI) performs risk-based checks on imported food.

The agreement between Australia and New Zealand does not cover some areas of food regulation; others are subject to an opt-out regime.

Food law

The Australia New Zealand [Food Standards Code](#) (otherwise known as the Code)

Labelling regulation

Part 1.2 of the [Food Standards Code](#) states the labelling and other information requirements.

FSANZ also developed labelling [guidance](#) to help comply with the labelling requirements.

Plant-based meat and dairy products

There are currently no specific regulations. Whether a product is permissible will depend upon the context in which it is used.

The Alternative Proteins Council has developed the [Industry Guidelines for Labelling Meat Alternative Products in Australia and New Zealand](#).

[The Labelling and Marketing of Plant-based Alternatives to Meat and Meat-based and Dairy products— Industry Working Group \(Discussion Paper\)](#)

Fermentation-derived and cultivated meat

Cell-based meats and novel fermentation-derived proteins would be captured within existing standards in the Code and require pre-market approval. Depending on the composition, these standards may include those for:

- [Novel foods](#)
- Processing aids
- Food additives
- Foods produced using gene technology
- Vitamins and minerals
- Labelling that indicates the true nature of the food
- Definition of cell-based meat
- Food safety requirements

Genetically Modified Organism (GMO) regulation

In the Food Standards Code, GM foods are regulated under [Standard 1.5.2—Food produced using Gene Technology](#). The standard has two provisions—mandatory pre-market approval (including a food safety assessment) and mandatory labelling requirements. This standard ensures that only assessed and approved GM foods enter the supply. Approved GM foods are listed in [Schedule 26 of the Food Standards Code](#). Anyone seeking to amend the Code to include a new GM food should refer to the [Application Handbook](#).

Details on FSANZ’s assessments of [GM foods and current approvals can be found here](#).

Import-export portal or services (if any)

[Importing food into Australia](#)

[Importing food and beverages](#) into New Zealand

Registration of business

[Food Importer](#) Registration—New Zealand

Tariff benefits

With Australia, India has an Economic Cooperation and Trade Agreement (ECTA), and Australia has also granted a GSP status to India, under which the concessional rate of tariff is 0%. To avail this benefit, the goods must meet the Rules of Origin, which typically require at least 50% Regional Value Content (RCV). Under the ECTA, the goods must meet 35% or 45% Qualifying Value Content (QVC), subject to the formula (build-up or build-down). Such conditions are to be proven by way of certificates/declarations from the notified agencies.

While New Zealand and India have restarted negotiations on a long-stalled Free Trade Agreement (FTA), currently there is no concessional tariff applicable on exports to New Zealand. The standard rate of tariff is typically around 5%, subject to product classification.

Gulf Cooperation Council (GCC)

Largest economic group in the Middle East and 11th-largest economy in the world.

Population

57.6
million

Average age

30
years

Plant-based
meat sales
projected growth
by 2034 (USD)

924.2
million

Expected CAGR
between 2026-2034



11.13%

01 Market size

- The plant-based meat market in the Gulf Cooperation Council (GCC) is estimated to be [USD 357.6 Million in 2025](#). Looking forward, the market is estimated to reach USD 924.2 Million by 2034, exhibiting a growth rate (CAGR) of 11.13% during 2026-2034.
- Saudi Arabia and the United Arab Emirates (UAE) possess the largest populations and contribute significantly to the region's GDP.

02 Consumer profile and demand

- A substantial percentage of the population consists of expatriates and residents from diverse international backgrounds, with the UAE, Qatar, and Kuwait's immigrant populations exceeding 70%.
- [A study by Ventures Middle East](#) found that 56 per cent of F&B consumers in the GCC are demanding plant-based options, spurring local innovation and product development. The pandemic reinforced trends in healthy eating, leading to a sustained shift towards plant-based, flexitarian, and vegan diets.
- Governments in the Middle East are increasingly promoting plant-based diets as part of their health and sustainability agendas. For instance, the UAE's National Food Security Strategy aims to increase the availability of plant-based foods by 35% in future.

03 Product formats in the market

By protein type

- Unlike the West, poultry represents the predominant meat consumed in the GCC.
- Islamic dietary laws prohibit the sale and consumption of pork in the majority of GCC member states.
- Exemptions exist within the UAE and Bahrain, where non-Muslims are legally permitted to consume pork.

By format

- Western formats such as burger patties, sausages, nuggets, and mince are popular choices among the rising youth population.
- Adapting to local cuisines is the [biggest need gap](#) in the plant-based meat market in GCC. Recognising the importance of traditional flavours, some companies have developed plant-based versions of regional dishes such as kebabs, koftas, shawarma, shish tawook, kibbeh, and kabsa, among others.
- Halal certification is mandatory for market entry in this region. While vegan ingredients are inherently halal, plant-based meat manufacturers are increasingly pursuing halal certification to enhance consumer confidence among Muslim demographics. For instance, Beyond Meat secured halal certification prior to distributing its products in the Middle East.
- Conversely, any food product, ingredient, or additive containing or produced using alcohol is considered haram and is unsuitable for consumption or use.

04 Key players in the market

- Many prominent international brands distribute their products within the GCC region. Some of the key brands include **Beyond Meat**, **Impossible Foods**, **Green Leaf**, **Vivera** and the **Meatless Farm Co.**, etc.
- Local brands include **THRYVE (by IFFCO)**, **Switch Foods**, **Al Islami**, **Nabati**, and **Al Kabeer**.
- Based in the UAE, **IFFCO** operates the GCC's first large-scale plant-based meat factory. Its fava-bean-based range includes burgers, mince, shawarma, and nuggets. Thryve's products are available in major hypermarkets across Saudi Arabia and the UAE.
- Based in Abu Dhabi, **Switch Foods** produces plant-based kebabs, koftas, soujouks, mince, and burger patties.
- Founded in 2020, **Arlene** specialises in frozen ready-to-eat vegan meals that incorporate meat analogues, offering dishes like kebabs, kibbehs, gyozas, dan dan noodles, spring rolls, spaghetti bolognese, and chilli con carne.
- Launched in 2024 as a subsidiary of Food Specialties Limited, Dubai-based **Nadura** offers clean-label meat-free proteins made from Canadian peas, including frozen burgers, mince, and kebabs. Their products are currently available online at Elfab in the UAE, with plans to expand into the food service and hospitality sectors.

05 Key channels

Retail

- The key grocery formats in the GCC region are primarily supermarkets, hypermarkets, and increasingly, discount grocery stores, with a growing trend towards online grocery delivery services.
- Traditional markets, known as souks, retain relevance in specific locales, particularly for the acquisition of fresh produce and regional culinary specialities.
- In the UAE, hypermarkets and supermarkets constitute the majority market share, representing approximately 85% of total consumer expenditure. The e-commerce segment, while experiencing rapid expansion, currently accounts for

approximately 15% of the market. Leading entities within this sector include **Carrefour, Lulu Hypermarket,** and **Spinneys,** each operating an extensive network of outlets across the nation. Additional prominent retail formats include **Choitrams, Union Coop, Al Maya, Viva, West Zone, Zoom, Geant,** and **Waitrose.**

- The Saudi Arabian food and grocery retail market is primarily controlled by a consortium of major enterprises, encompassing both domestic retailers and international chains. Key market participants include **Al Othaim Markets, Carrefour, Panda Retail, Lulu, Tamimi, Farm Superstores, Al Raya, Bin Dawood,** and **Danube,** among others.

Food service

- QSRs, cafes and bars, followed by FSRs are the most popular formats in the GCC.
- In the UAE, QSR is the leading food service channel, accounting for over 41% revenue share in 2022. The market is dominated by large business houses such as **Alshaya, Americana,** and **Azadea,** which operate multiple brand franchises. These three business houses combined hold approximately 10% of the food service market of the UAE.
 - Alshaya, a multinational retail franchise operator headquartered in Kuwait, operates Starbucks, The Cheesecake Factory and P.F. Chang's in the MENA region.
 - Americana, a food company headquartered in Sharjah, operates global brands such as KFC, Pizza Hut, Hardee's, Krispy Kreme, and TGI Fridays across the MENA region and Kazakhstan.
 - Azadea, a premier lifestyle retail company that owns and operates more than 40 leading international franchise concepts across the MEA region is the third-biggest player in the country and operates F&B brands like Paul (French chain of bakery-café restaurants) and Peal Juice bar.
- **Yum! Brands, CKE Restaurants, Doctor's Associates, Restaurant Brands International, McDonald's, Brinker International,** and **Golden Gate Capital** are some of the other popular operators in the QSR category.
- Key players in the Saudi Arabian food service market include **Albaik, Almarai, Nadek, Savola Group,** and **SADAFCO.**

06 Key brand tie-ups and initiatives



Switch Foods has partnered with several organisations, including **Al Safadi**, **Paul Café**, **The First Group**, **Emirates Airlines**, and **The Millennium Hotels & Resorts Group**, to develop and offer specialized plant-based menus.



Protein Alternatives (PALT) Initiative (Abu Dhabi) – An innovation ecosystem effort, co-organised by **ADNEC Group** and **ADIO**, aimed at building collaboration platforms around alternative proteins, research, investors, producers, and government agencies as part of Global Food Week 2025. This fosters partnerships between local actors and international tech innovators.



Planted, a European plant-based meat start-up, entered the UAE and broader Middle East foodservice market through distribution partnerships with select restaurant and hotel operators, expanding alternative protein availability across HORECA channels.

07 Key distributors, manufacturers, and retailers



Baqer Mohebi Enterprises (BME) handles both food and non-food consumer products, with an extensive distribution network serving supermarkets, hotels, and restaurants.



Al Saniya Foodstuff Trading offers a wide range of food products and has a strong presence in both retail and HORECA sectors.



Gulf International distributes top FMCG brands such as Betty Crocker, Mars Wrigley, and Douwe Egberts Coffee.



Lifco International distributes dry, chilled, and frozen food products, serving major hypermarkets, restaurants, and hotels across the region.



AJD Trading Company, a premium food distributor in the UAE, specialises in importing high-quality food products from international suppliers and distributing them at competitive prices.



Lootah Premium Foods, known for introducing new brands in the UAE and the GCC, supplies premium products to retail and HORECA channels.



Crescent General Trading LLC specialises in distributing brands like Bajaj, Weikfield, and Parle.



Al Maya Distribution distributes both food and non-food products to retail outlets, restaurants, and supermarkets across the country.

08 Regulatory overview

Legislative authority / Regulatory body

Ministry of Climate Change and Environment (MOCCA), Ministry of Industries and Advanced Technologies (MOIAT), Ministry of Health (MOH), and Ministry of State for Food and Water Security.

Local municipalities within each emirate, such as the Abu Dhabi Agriculture and Food Safety Authority (ADAFSA) and The Food Control Department—Dubai Municipality, serve as administrators of the federal food regulations, ensuring that imported and locally produced products comply with national laws.

Food laws are established within the GCC Gulf Standardisation Organisation (GSO) and adopted by participating member countries. All GCC member states, including the UAE, have the authority to develop and institute national food legislation in addition to those formed within the GSO.

Food law

[UAE Federal Law No. 10 of 2015 on Food Safety](#) imposes standards and regulations for maintaining the safety and quality of food and ensuring the protection of public health and consumers.

The law states that no food may be imported into the country for the first time without the approval of the MOCCA.

**Labelling
regulation**

[The UAE.S GSO 9:2019 'Labeling of Prepackaged Food Stuff'](#) and its referenced GSO standards identify the food labelling requirements for the UAE.

[The UAE.S GSO 2233:2021 'Requirements of Nutritional Labeling'](#) requires mandatory disclosure of nutritional information.

[General Restriction and Requirements Relevant to Prepackaged Food Stuffs Labels](#)

**Plant-based
meat and dairy
products**

There are no specific standards for plant-based meat or dairy alternatives.

**Fermentation-
derived and
cultivated meat**

Cell-based food and novel fermentation-derived foods fall under UAE.S 5048/2021, 'General Requirements for Novel Foods,' which sets out general requirements for importing, manufacturing, or marketing novel foods.

**Genetically
Modified
Organism (GMO)
regulation**

In the UAE, the import, export, and circulation of genetically modified organisms (GMOs) and their products are regulated by [Federal Law No. 9 of 2020](#), requiring permits from the Competent Authority and notification to the MOCCA.

**Import-export
portal or
services (if any)**

[ZADI Portal](#)

[ZAD Portal](#)

[Dubai Municipality Services - Food Safety Department](#)

Registration of product/business

UAE importers must apply for a label assessment on food items before entry into the country. This process can be completed through ZAD, the Dubai Municipality's Food Import and Re-export Service (FIRS), or ZADI portals.

In Dubai, importers must receive label approval for food consignments for local consumption and re-export.

Food items registered for the first time and intended for import into Dubai will undergo laboratory testing through Dubai Municipality. Testing is based on product safety risks and the frequency of importation. If an ingredient or additive is detected but not included on the label, the food item will be rejected.

Tariff benefits

Under the UAE-India Comprehensive Economic Partnership Agreement (CEPA), a concessional tariff of 0% is applicable on exports to the UAE from India. To benefit from this, the goods must meet the Rules of Origin, which typically require at least 50% Regional Value Content (RVC). These conditions must be proven by certificates or declarations from notified agencies.

While GCC and India have been in negotiations of an FTA for quite some time now, currently there is no concessional tariff applicable on the exports to GCC countries (except the UAE). The standard rate of tariff is 5%.

Singapore

30th largest economy in the world in 2023 known for its supportive regulatory environment

Population

5.9
million

Average age

42.8
years

Percentage of
food currently
imported

90%

Percentage of local food
production to be reached by 2030
under the '30 by 30' initiative

30%

01 Market size

- Singapore serves as a strategic entry point into Southeast Asia and is leading the way in alternative protein development and popularity, relative to other Southeast Asian nations.
- The government actively supports the alternative protein industry through regulatory frameworks conducive to cultivated meat companies and incentives for global food corporations to establish research and development centers, new product development facilities, and pilot projects within Singapore. [Hong Kong-based Avant Meats](#) established a research and development center and pilot manufacturing facilities in Singapore in April 2021 with support from the Singapore Economic Development Board. Similarly, Swiss companies Givaudan and Buhler inaugurated the [Asia-Pacific protein innovation center](#) in Singapore that same month. Additionally, Singapore alone now boasts six training modules at its universities and polytechnics solely dedicated to alternative proteins, up from just two in 2022. Building on the template pioneered in Singapore, GFI APAC's scientists have begun working with universities in Malaysia and Thailand to launch similar training modules.
- Singapore was the [first country to approve the sale of a cultivated meat product in December 2020](#), establishing a global precedent.

02 Consumer profile and demand

- As of mid-2023, 61.6% of Singapore's population were citizens. The remaining 38.4% were permanent residents and non-residents, such as foreign workers and international students.
- According to a [2023 YouGov survey](#) in Singapore, 51% consider themselves as meat eaters. About 18% see themselves as flexitarians who eat a primarily plant-based diet but still occasionally consume meat and fish. Only 5% of the respondents adopt a fully plant-based diet that may exclude all animal products.
- [The primary deciding factors](#) for meat-eaters when choosing a meal are taste and price. For flexitarians, taste and health are equally important. In contrast, health is the most significant factor influencing the food choices of vegetarians and vegans.

03 Product formats in the market

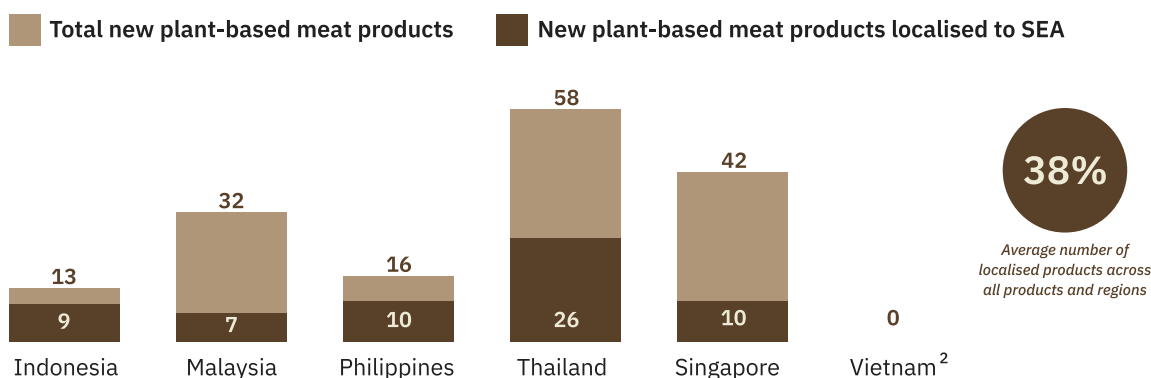
By protein type

- Beef currently dominates the plant-based meat sector in Singapore. But pork and chicken are growing at a rapid pace in line with the region’s meat preferences. Seafood presents a significant opportunity, and not a lot of innovation has been seen in this segment.

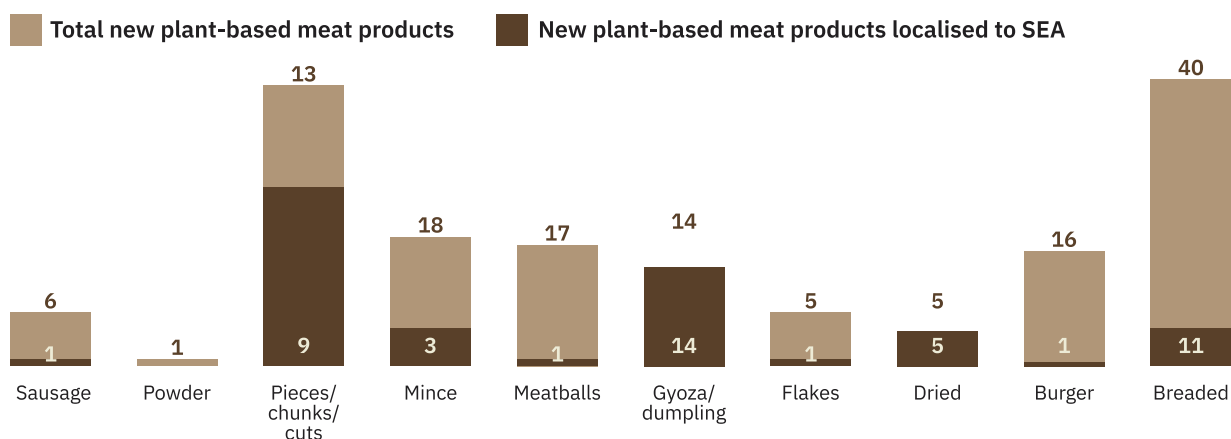
By format

- Asian meat formats are critical to garner interest among consumers in Singapore. These include products that are compatible with the local cuisine, consisting of rice or noodles accompanied by stir-fried meat, vegetables, or gravies/sauces.

New plant-based meat product launches in Southeast Asia (SEA) by country, 2022 - Q2 2023 (By country and localisation)



New plant-based meat product launches in SEA by country, 2022 - Q2 2023 (By product type and localisation)



04 Key players in the market

- Singaporean companies make up a 24% share of alternative protein startups in the region. Of the 200+ startups known to GFI APAC, Singapore is home to 50 of them. Over half of Singapore's sector startups are focused on plant-based proteins, almost a third in cultivated meat, and the remaining in fermentation-derived proteins.
- **Impossible Foods, Beyond Meat, and Quorn** are some of the global companies operating in Singapore.
- **ALTN, Karana, and Meat Zero** are some of the companies from Southeast Asia operating in Singapore.

05 Key channels

Retail

The F&B retail landscape in Singapore is a dynamic mix of physical stores and e-commerce platforms.

- As of September 2024, **FairPrice** and **Sheng Siong** were the largest supermarket chains, with approximately 161 and 70 outlets, respectively.
- Other popular supermarkets include **Giant** and **Prime**.
- FairPrice Finest caters to the growing demand for meat alternatives by offering plant-based products, such as those from **Green Rebel**.
- **7-Eleven** and **Cheers** are well-known convenience stores with a significant presence across the country.
- **Culina**, a speciality store known for its curated selection of fine foods and wines, operates 15 branded butcheries within FairPrice Finest and FairPrice Xtra supermarkets through a strategic partnership.
- **Everyday Vegan Grocer** is another speciality store that offers a variety of plant-based products, including those from brands like **Next Meats**.
- Popular e-commerce platforms include **Amazon Fresh, Redmart, and FairPrice Online**.

Food service

Hawker centres are integral to Singapore's culinary identity. Hawker centres, such as Maxwell Food Centre, Lau Pa Sat, Newton Food Centre, and Tekka Centre, offer a wide array of affordable local dishes, attracting both locals and tourists.

Apart from hawker centres, FSRs, QSRs, cafes, bars, and cloud kitchens are an important part of the food service landscape. TungLok Group, Les Amis Group, and Paradise Group are some of the prominent full-service players.

06 Key opportunities for startups



The **NUS Bezos Centre and Enterprise Singapore** invited early-stage sustainable protein startups (TRL 4–6) across fermentation, cultivated meat, plant-based proteins, and safety/toxicology to compete at the Singapore International Agrifood Week (SIAW) 2025. The top eight startups would have the opportunity to pitch at the Asia-Pacific Agri-Food Innovation Summit, with the top three receiving up to S\$150K in grant funding plus S\$25K in in-kind support. Eligible startups are required to be independently incorporated within the past 10 years and either based in, or committed to anchoring operations in Singapore.

Separately, the **Sustainable Protein Grant Call** targeted at growth-stage startups (TRL 7–9) developing scalable, proprietary agrifood innovations for human consumption is inviting applications until February 2026. Three winners will be awarded up to S\$1M each (S\$500K from the Bezos Earth Fund and S\$500K from Enterprise Singapore), disbursed over 30 months against agreed milestones. Recipients are required to incorporate in Singapore, with an equity component attached to the Enterprise Singapore portion of the grant.

07 Key distributors, manufacturers, and retailers



Indo-Guna, specialises in high-quality meat and gourmet products, has partnered with Growthwell Foods to supply plant-based meat and seafood alternatives to hotels, cafes, and restaurants.



Country Foods, a major food importer, distributor, and manufacturer, supplies conventional proteins and plant-based alternatives to over 1,000 international clients in the retail and food service sectors.



Ban Choon Marketing, a leading importer and wholesaler of premium fresh fruits, vegetables, and organic groceries, offers plant-based meats and ingredients to supermarkets, restaurants, caterers, and wholesalers.



SGProtein specialises in developing and manufacturing plant-based meat and fish and provides end-to-end solutions for businesses in the plant-based protein market.



Hua Kun, a leading importer, wholesaler, and distributor of halal meat products, has a vast distribution network that could potentially be leveraged to distribute plant-based meat alternatives.



Food Empire serves a wide range of clients, from small food chains to major hotels like Raffles Hotel.



SATS BRF Foods, specialises in quality frozen and chilled meats, seafood, and gourmet products, servicing upmarket restaurants and international airlines.



Angliss Singapore works with a wide range of clients from hotels to catering businesses, including major clients like Ritz-Carlton Millenia Singapore.



FoodXervices Inc Pte Ltd, a leading wholesale food distributor offering a wide range of products, partners with the Canadian firm Top Tier Foods to distribute plant-based wagyu.



Makoto-Ya offers a vast portfolio of over 1,000 different items across 200 brands and labels and has strong relationships with leading hotels, restaurants, supermarkets, retail stores, and e-commerce platforms.

08 Regulatory overview

Legislative authority / Regulatory body

The Singapore Food Agency (SFA), a statutory board under the Ministry of Sustainability and the Environment (MSE), is responsible for all food-related regulations in the country.

Food law

The SFA was established and given powers vide [the Singapore Food Agency Act 2019 \(SFA Act\)](#). Under the SFA Act and the [Sale of Food Act 1973](#), detailed information is provided on Singapore's guidelines governing imported food and agricultural products. All imported and locally produced food, beverage, and edible agricultural products (including food ingredients) must adhere to the prevailing requirements in these statutes.

Labelling regulation

[Food Regulations](#) contains specific provisions on the requirements for labelling (regulation no. 5) and additional requirements.

You may also refer to the SFA's [Guide to Food Labelling and Advertisements](#).

Plant-based meat and dairy products

Terms such as ‘mock,’ ‘cultured,’ or ‘plant-based’ should indicate the products’ true nature—e.g., mock pork, cultured chicken, plant-based burger patties.

Fermentation-derived and cultivated meat

The SFA recommends specific assessment tests for specific types of novel foods. In their guidelines ‘[Requirements for the Safety Assessment of Novel Foods and Novel Food Ingredients](#),’ these particular types of novel foods are classified into the following categories:

- Novel food ingredients that are chemically identical to naturally occurring substances but produced through unconventional processes.
- Novel foods produced by biomass fermentation (e.g., single-cell proteins, mycelial biomass from fungal species).
- Cultured meat, where cells grown in a suitable growth media, are assembled on a ‘scaffold’ to produce products resembling meat muscle.

Genetically Modified Organism (GMO) regulation

When assessing novel foods produced from GMO, SFA defers to the Codex Alimentarius’s Guidelines for the [Conduct of Food Safety Assessment of Foods Produced Using Recombinant-DNA Microorganisms \(CAC/GL 46-2003\)](#) or [Recombinant-DNA Animals \(CAC/GL 68-2008\)](#).

If GMOs are present in the finished food product, the product will also be reviewed by the Genetic Modification Advisory Committee (GMAC).

Import-export portal or services (if any)

[Food Import and Export](#)—SFA Information Dashboard

Registration of business

You need a [licence or registration from SFA to export or tranship food and food products](#). You will also need a Cargo Clearance Permit (CCP) for every consignment.

Tariff benefits

India and Singapore have a Comprehensive Economic Partnership Agreement (CEPA) as well as the ASEAN-India FTA, whereunder the concessional rate of tariff is 0%. For availing the benefits, the goods are required to meet the Regional Value Content requirement of 35% (under ASEAN India FTA) and 40% (under the CEPA) in the goods being exported from India, along with such other specific requirements as may be applicable product-wise. Such conditions are to be proven by way of certificates/declarations from the notified agencies.

Regulatory overview: In collaboration with Acuity Law

This regulatory overview has been developed in partnership with Acuity Law, a valued member of our Regulatory Advisory Council (RAC).

About Acuity Law:

ACUITY LAW

Acuity Law provides comprehensive legal counsel across various domains, including corporate, tax, regulatory, employment, and dispute resolution. With extensive experience in the agricultural and SME sectors, Acuity Law brings a deep understanding of these areas to each of its practice specialisations. Their collaboration with GFI India is spearheaded by Souvik Ganguly and Shreyas Shrivastava. For further information, please visit www.acuitylaw.co.in or contact them directly at al@acuitylaw.co.in.

ANNEXURE

EXPORTING SMART PROTEINS FROM INDIA

The Indian government recognises the growing importance and volume of international trade. India has also harmonised with various international requirements to achieve its goal, i.e., Codex Alimentarius, Sanitary and Phytosanitary (SPS) measures, Technical Barriers to Trade (TBT), Traceability Codes, and Consultation

procedures. India has enacted regulations for export and laid down prescribed formats, which align with the provisions of the SPS agreement. India has evolved mechanisms to undertake inspection and certification functions as mandated for the countries desirous of enabling their products access to the international market.

Following is an overview of the statutory requirements for food exports from India.

1. If you intend to export any food items, including ingredients and additives, for commercial use, you must first be registered as a proprietorship, partnership, private, or public limited company. You may refer to [our private limited company incorporation guide](#).
2. You must have a [PAN Card](#)¹ and apply for [GST registration](#).²
3. Every importer must have an Importer Exporter Code (IEC) from the

[Directorate General of Foreign Trade](#).³

4. You must obtain an exporter license (either Manufacturer Exporter or Trader Exporter) from the [Food Safety Compliance System \(FoSCoS\)](#)⁴ of the Food Safety and Standards Authority of India (FSSAI). In particular, please refer to the [list of documents](#)⁵ that must be submitted to obtain the exporter license. You may also refer to our [FSSAI Licensing for Food Businesses](#) guide.
 - a. The FSSAI central authority issues

¹ Online PAN Application on the Protean eGov Technologies Limited website [<https://incometaxindia.gov.in/Pages/tax-services/apply-for-pan.aspx>]

² GST Registration [<https://reg.gst.gov.in/registration/>]

³ Directorate General of Foreign Trade [<https://www.dgft.gov.in/CP/>]

⁴ Food Safety Compliance System (FoSCoS) Portal [<https://foscos.fssai.gov.in/>]

⁵ Documents Required | FoSCoS [<https://foscos.fssai.gov.in/home-document>]

- the license for the exporter kind of business. The government fee for the FSSAI Central license is INR 7500 per year.
- b. The FSSAI License for exports has two sub-types:
 - i. Manufacturers of food products for export
 - ii. Exporting traders/merchants
- An FBO can apply for either type of certification.
- c. Further, the applicants must declare whether they deal only in exports or in both the domestic and export markets.
 - d. The business units certified by the Ministry of Commerce as 100% export units can apply for the FSSAI Exporter License.
- e. An IEC certificate is also essential to obtaining an FSSAI export license. The FBO must ensure that all the premises for which the FSSAI license for export is required have been mentioned in the IEC Certificate.
 - f. A food business operator is required to apply for a separate FSSAI Exporter License for each premise from where the export of food products is carried out.
5. Food-exporting businesses must ensure that the exported products or ingredients comply with the regulations of the destination market.

Figure 1: Five key pre-requisites to export food from India



OVERVIEW OF SOME OF THE KEY PROVISIONS OF THE EXPORT REQUIREMENTS

The regulatory pathway for exporting alternative protein products to market differs from country to country. Below are some key provisions that provide an overview of the standard clauses for compliance:

- **Minimum Shelf Life Requirement:** The article of food will be cleared from customs only if it has a valid shelf life as per the requirement of the destination country. (**Shelf life** means the period between the date of manufacture and the **best before** or **date of expiry**, whichever is earlier, as printed on the label).
- **Labelling Requirement:** All exported consignments must comply with the importing country's labelling provisions.
- **Country of Origin Labelling (CoOL):** Declaration of the Country of Origin of the food is a common requirement in various geographies. In cases where a food is processed in another country, and this process alters its nature, resulting in a change of the HS Code at the 6-digit level, the country where the processing takes place will be considered the country of origin for labelling purposes.

- **Storage Conditions:** The exported consignment of food articles must be stored so that one type of food does not come in contact with other types of food and as per the specified storage conditions of the customs warehouse. The authorised officer may refuse to grant an NOC clearance for the consignment in case of failure to conform.
- **Export of Novel Foods:** No novel food shall be exported for commercial purposes without the prior approval of the food authority in relevant geographies, which must be obtained by applying along with all relevant documents and details as specified.

Apart from the foregoing, subject to the nature of the food item being exported, additional certifications/documents may have to be submitted to obtain import clearance. This must be determined on a case-by-case basis.

- The Licensing Authority may cancel or suspend a food export license for contravention of the provisions of these regulations or the [FSS \(Licensing and Registration of Food Businesses\) Regulations, 2011](#).⁶

⁶ Food Safety and Standards (Licensing and Registration of Food Businesses) Regulation, 2011 [https://www.fssai.gov.in/upload/uploadfiles/files/Compendium_Licensing_Regulations_04_08_2021.pdf]

ABOUT THE AUTHORS

Rajyalakshmi G.,

Market and Consumer Insights Advisor, GFI India

Rajyalakshmi focuses on creating and executing consumer research that can meaningfully drive the smart protein market forward. She brings over 16 years of experience working with stalwart Indian and international consumer brands and F&B giants. Rajyalakshmi works on identifying the market potential of alternative proteins in India. She expertly curates insights on consumer trends, perceptions, and behaviours to guide product development, positioning, labelling, and go-to-market strategies for brands across plant-based meat, dairy, and eggs.

Ojasvi Uppal,

Regulatory Affairs Consultant, GFI India

As a seasoned food safety, law, and regulatory affairs expert, Ojasvi has helped multiple food businesses with their compliance projects. Ojasvi leads the creation of open-access regulatory resources to empower startups with accurate knowledge of the sector and its regulatory requirements. He works on actively building inroads with regulatory authorities and advises on a clear path to market for smart protein companies.

ABOUT THE GOOD FOOD INSTITUTE INDIA

The Good Food Institute India (GFI India) is the central expert organisation, thought leader, and convening body in the Indian alternative protein or smart protein sector. As part of an international network of organisations with partners in the U.S., Brazil, Europe, Israel, Asia Pacific, and Japan, GFI India is on a mission to build a secure, sustainable, and just global food future. With unique insights across science, business, and policy, we are using the power of food innovation and markets to accelerate the transition of our food system toward smart proteins. In building the sector from the ground up in India, we're aiming to establish a model for its growth in the developing world.

