

Global Vital Wheat Gluten Market 2026

Market size, segmentation, competitive landscape and outlook

2021-2031

Moving forward, together



Every one of us has, at some point, heard the line from *Alice in Wonderland*: “It takes all the running you can do, to keep in the same place. If you want to get somewhere else, you must run at least twice as fast.” Cliché as the quote has become, our world is changing at extraordinary speed. And yet, to my mind, it matters not only to run fast, but — more importantly — to know where you are running.

We see ourselves as the navigator, ready at the right moment to point out the correct course. By providing current, timely information for the decisions that matter, we aim to protect our clients from missteps and to help them find new opportunities.

It matters to us that you are satisfied with the work we have done. If you have any questions about this report, we will be glad to answer them.

ANDREY SHEVCHENKO, Managing Partner

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Market at a glance

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Indicator	Value
Market size (2025)	USD 2.5 bn
Forecast (2031)	USD 3.6 bn
CAGR (2021-2031)	6.5%
Study period	2021-2031
Largest region	Europe · 34.6%
Fastest-growing region	Asia-Pacific · 7.6%
Market concentration	Moderate
Licence	Individual / Company

The global vital wheat gluten market reached USD XXX billion in 2025 and will advance to USD XXX billion by 2031, expanding at a XX% CAGR. Bakery remains the core application, while plant-based meat, protein-enriched foods, aquafeed and pet nutrition are widening the addressable demand base. Europe holds the largest regional share through its integrated wheat-starch industry, while Asia-Pacific delivers the fastest growth as industrial baking and convenience-food capacity expands. The report quantifies market value, volume, pricing, trade flows, application demand, competitive positioning and country-level opportunities through 2031.

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Executive summary

The global vital wheat gluten market reached USD XXX billion in 2025 and will advance to USD XXX billion by 2031, expanding at a XX% CAGR. Bakery remains the core application, while plant-based meat, protein-enriched foods, aquafeed and pet nutrition are widening the addressable demand base. Europe holds the largest regional share through its integrated wheat-starch industry, while Asia-Pacific delivers the fastest growth as industrial baking and convenience-food capacity expands. The report quantifies market value, volume, pricing, trade flows, application demand, competitive positioning and country-level opportunities through 2031.

Indicator	Value
Market size 2025	XXX
Forecast 2031	XXX
CAGR	XXX
Largest region	XXX
Fastest region	XXX

Key findings

- Global vital wheat gluten market revenue reached USD XXX billion in 2025 and will reach USD XXX billion in 2031.
- Bakery applications represented XX% of global market value in 2025, supported by industrial bread, frozen dough and flour-standardization demand.
- Europe accounted for XX% of 2025 revenue, reflecting extensive integration between wheat milling, starch, sweetener, ethanol and protein production.
- Asia-Pacific will expand at a XX% CAGR through 2031, the fastest rate among the five regions.
- The United States imported XXX metric tonnes of HS 110900 wheat gluten worth USD XXX million in 2024, according to UN Comtrade data disseminated through WITS.
- China exported XXX metric tonnes of HS 110900 wheat gluten worth USD XXX million in 2024.
- European Union exports reached XXX metric tonnes and USD XXX million in 2024, confirming the region's central role in international supply.
- Australia exported XXX metric tonnes worth USD XXX million in 2024, including XXX metric tonnes shipped to the United States.

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Market size and forecast

Market value by year, USD bn

Indicator	2026	2027	2028	2029	2030	2031	CAGR
Market value, USD bn	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Market volume	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Production	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Imports	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Exports	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Apparent consumption	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

Year-over-year value change

Indicator	2027	2028	2029	2030	2031	CAGR
Market value	X%	X%	X%	X%	X%	X%
Production	X%	X%	X%	X%	X%	X%
Imports	X%	X%	X%	X%	X%	X%
Exports	X%	X%	X%	X%	X%	X%

Source: XXX

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Global Vital Wheat Gluten Market Trends and Growth Drivers

Vital wheat gluten sits at the intersection of grain processing, bakery productivity and the broader protein economy. Its commercial value derives from a distinctive viscoelastic network that strengthens dough, binds water and creates texture, making it difficult to replace fully in high-speed bread lines, frozen dough and seitan-style products.

Supply economics are shaped by integrated wet milling. Gluten is produced alongside starch, glucose, ethanol and feed ingredients, so utilization decisions reflect the combined margin across the wheat fractionation complex. This creates periodic disconnects between wheat costs, gluten availability and selling prices.

Demand growth is broadening beyond traditional flour correction. Plant-based meat, hybrid protein products, extruded snacks, aquafeed and premium pet food reward customized functionality, while decarbonization and origin traceability are becoming more important in supplier qualification.

Growth drivers

Industrial bakery capacity and flour correction

Large bakeries use vital wheat gluten to normalize variable flour protein, strengthen dough and improve gas retention on automated lines. Expansion in packaged bread, buns, frozen dough and centralized bakery production raises inclusion volumes while reducing manufacturers' tolerance for inconsistent specifications.

Plant-based meat texture systems

Vital wheat gluten provides elasticity, binding and fibrous bite in seitan, hybrid meat products and extruded analogues. Its functionality and competitive cost support continued adoption in formulations that blend wheat protein with pea, soy or fava protein.

Convenience foods and frozen dough

Frozen pizza, refrigerated dough, instant noodles and par-baked products require stronger protein networks to tolerate storage, handling and extended processing. Growth in modern retail and foodservice distribution therefore increases gluten intensity per tonne of finished flour-based food.

Protein fortification

Food manufacturers are adding protein to bars, cereals, snacks and weight-management products while controlling ingredient cost. Vital wheat gluten offers high protein density and established processing behavior, particularly where neutral functionality matters more than complete amino-acid positioning.

Aquafeed and pet nutrition formulations

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Gluten supplies digestible protein and binding performance in extruded aquafeed and pet food. Premiumization, higher aquaculture output and demand for stable pellet integrity expand use beyond traditional bakery customers.

Integrated wheat biorefinery economics

Investment in starch, ethanol, sweetener and protein complexes increases the availability of gluten as a high-value co-product. Producers that monetize every wheat fraction can operate with stronger utilization rates and more competitive delivered costs.

Restraints

Wheat and energy cost volatility

Wheat accounts for the central feedstock exposure, while separation, drying and transport make energy prices material to conversion cost. Rapid cost movements compress producer margins when annual customer contracts delay price pass-through.

Allergen and gluten-avoidance demand

Wheat is a declarable allergen in major food markets, and gluten-free positioning excludes vital wheat gluten from a visible portion of bakery and prepared-food innovation. Segregation and label-management requirements also increase formulation complexity for diversified food plants.

Alternative protein competition

Soy, pea, fava, potato and fermentation-derived proteins compete for protein-fortification and meat-alternative applications. Wheat gluten retains an advantage in elasticity and cost, but formulators may reduce inclusion where allergen diversification or amino-acid balance takes priority.

Anti-dumping duties and trade friction

Trade remedies alter landed costs and can redirect high-volume shipments between North America, Europe, Australia and Asia. Importers must diversify origins and hold additional inventory when duty exposure or customs treatment changes.

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Vital Wheat Gluten Market Driver and Restraint Impact

Drivers — impact on forecast

Driver	Impact on CAGR	Geography	Horizon
Industrial bakery capacity and flour correction	XXX	XXX	XXX
Plant-based meat texture systems	XXX	XXX	XXX
Convenience foods and frozen dough	XXX	XXX	XXX
Protein fortification	XXX	XXX	XXX
Aquafeed and pet nutrition formulations	XXX	XXX	XXX
Integrated wheat biorefinery economics	XXX	XXX	XXX

Source: XXX

Restraints — impact on forecast

Restraint	Impact on CAGR	Geography	Horizon
Wheat and energy cost volatility	XXX	XXX	XXX
Allergen and gluten-avoidance demand	XXX	XXX	XXX
Alternative protein competition	XXX	XXX	XXX
Anti-dumping duties and trade friction	XXX	XXX	XXX

Source: XXX

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Vital Wheat Gluten Market Segmentation Analysis

By Grade

Standard food-grade material dominates industrial baking, flour correction and general processed-food demand because it combines consistent functionality with scale economics. High-strength and customized grades command higher prices in frozen dough, noodles, extrusion and automated bakery systems. Organic grades remain a focused premium segment constrained by certified-wheat availability.

Value by grade, USD bn

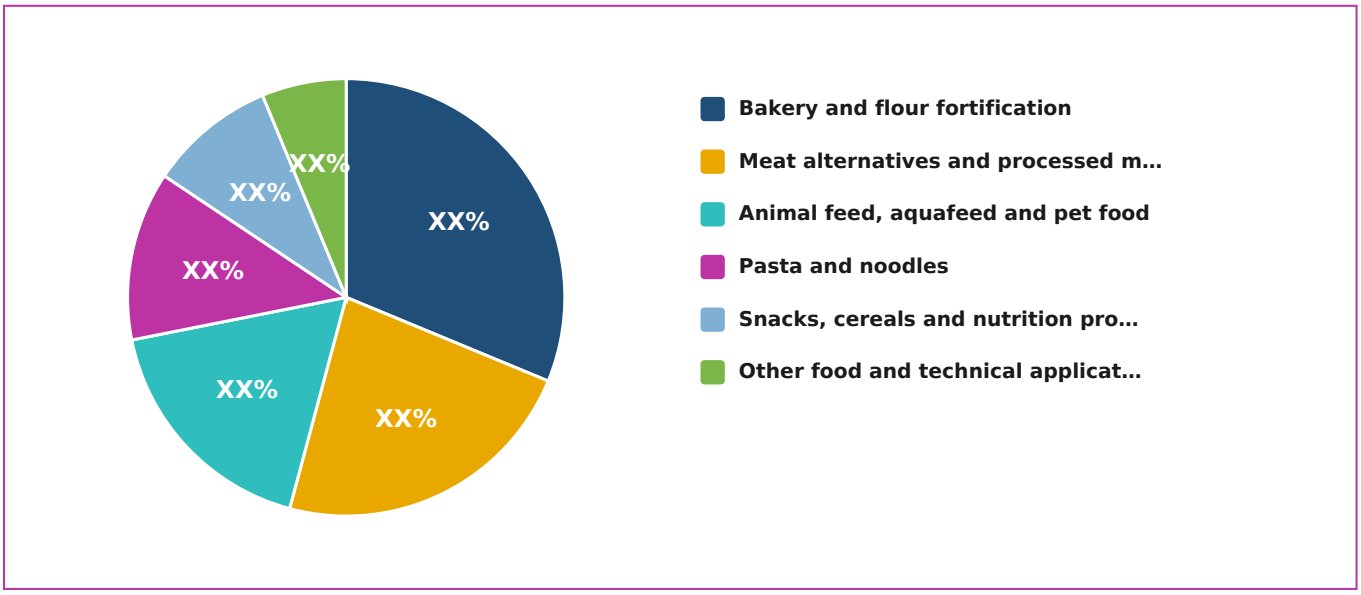
Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Standard food grade	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
High-strength and customized grade	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Certified organic grade	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Application

Bakery leads through bread, buns, frozen dough, pizza bases and flour standardization, where gluten directly improves dough strength and gas retention. Meat alternatives use gluten for binding, chew and fibrous structure and represent the fastest-growing application. Aquafeed and pet food gain from protein density and pellet-binding performance, while pasta, noodles and snacks provide steady industrial demand.

Value share by application, 2025



Source: XXX

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Value by application, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Bakery and flour fortification	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Meat alternatives and processed meat	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Animal feed, aquafeed and pet food	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Pasta and noodles	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Snacks, cereals and nutrition products	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Other food and technical applications	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Packaging

Multiwall sacks and flexible intermediate bulk containers dominate because they align with batch dosing and international container trade. Pneumatic bulk supply is concentrated among large plants located close to domestic producers and will expand with bakery consolidation. Small packs carry the highest unit value but serve specialist manufacturers, foodservice and retail ingredient channels.

Value by packaging, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Industrial sacks and supersacks	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Pneumatic and bulk tanker	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Small bags and specialty packs	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Sales Channel

Large bakeries, millers and multinational food manufacturers favor direct contracts covering specification, application support, volume commitments and indexed pricing. Distributors remain essential for fragmented users, smaller markets and customers requiring mixed pallets or local inventory. Digital procurement improves price discovery but remains embedded primarily within distributor and contracted-account models.

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Value by sales Channel, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Direct sales	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Distributors and ingredient specialists	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

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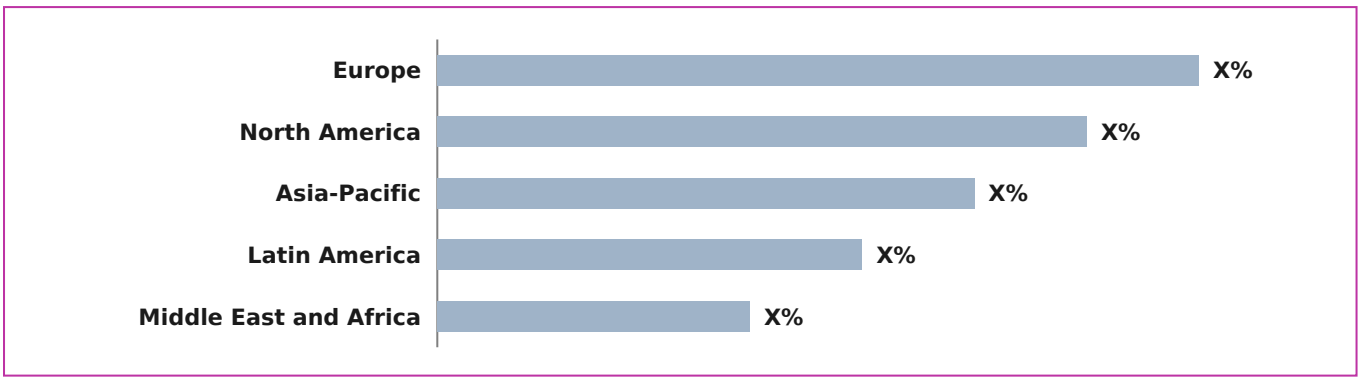
Vital Wheat Gluten Market Regional Analysis and Country Outlook

Europe generated XX% of global revenue in 2025. France, Belgium, Germany, Lithuania, Italy and the United Kingdom host integrated wheat-processing assets that produce gluten alongside starch, sweeteners, ethanol and feed ingredients. The European Union exported XXX metric tonnes of HS 110900 wheat gluten in 2024, while France alone exported XXX metric tonnes, demonstrating the region's importance to both domestic consumption and global supply.

North America accounted for XX% of 2025 value and remains the largest import-dependent demand center. The United States imported XXX metric tonnes worth USD XXX million in 2024, with industrial bakeries, flour millers, meat-alternative producers and pet-food manufacturers forming the core buyer base. Canadian supply is concentrated in ADM's Candiac facility and Permolex's Red Deer complex, while active trade-remedy proceedings influence European and Australian sourcing economics.

Asia-Pacific will post a XX% CAGR through 2031 as packaged bread, instant noodles, snacks, aquafeed and modern food manufacturing expand. China is simultaneously a major producer and exporter, shipping XXX metric tonnes in 2024, while Japan, South Korea, Thailand, India and Australia provide substantial import demand. Australia's Manildra platform gives the region a globally competitive export base, with the United States and Japan serving as major destinations.

Growth rate by region, 2025-2031



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Market value by region, USD bn

Region	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Europe	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
North America	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Asia-Pacific	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Latin America	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Middle East and Africa	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

Market value by leading country, USD bn

Country	2025	2031	Share 2025	CAGR
United States	XXX	XXX	XXX	XXX
Germany	XXX	XXX	XXX	XXX
United Kingdom	XXX	XXX	XXX	XXX
Belgium	XXX	XXX	XXX	XXX
Netherlands	XXX	XXX	XXX	XXX
Japan	XXX	XXX	XXX	XXX
China	XXX	XXX	XXX	XXX
Mexico	XXX	XXX	XXX	XXX

Source: XXX

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Vital Wheat Gluten Market Competitive Landscape and Company Share

The market is moderately concentrated: a group of integrated starch processors controls a substantial share of global capacity, but regional suppliers and Chinese exporters keep procurement competitive. Tereos, Roquette, ADM, Manildra Group, Cargill, CropEnergies, Sedamyl and MGP Ingredients combine established plants, application expertise and multinational distribution, while Kröner-Stärke, Crespel & Deiters, Permolex and Asian producers compete through specialization or regional cost positions.

Scale advantages arise from wet-milling integration rather than gluten production alone. Producers balance returns across starch, glucose, ethanol, feed and wheat-protein streams; consequently, gluten output and pricing respond to economics in adjacent co-product markets. Reliability, dough-performance consistency, protein specification, container availability and local warehousing remain central supplier-selection criteria.

Strategic investment is moving toward energy efficiency, application development and higher-value protein formats. Manildra is upgrading rail and heat-recovery infrastructure at Shoalhaven Starches, Tereos has rebuilt and upgraded milling capacity at Nesle, and Roquette has expanded its textured wheat-protein portfolio. These moves support lower delivered emissions, deeper technical collaboration and premiumization beyond commodity bakery grades.

Leading companies

Company	HQ	Est. revenue 2025	Market share 2025	YoY
Tereos SCA	XXX	XXX	XXX	XXX
Roquette Frères	XXX	XXX	XXX	XXX
Archer Daniels Midland Company	XXX	XXX	XXX	XXX
Manildra Group	XXX	XXX	XXX	XXX
Cargill, Incorporated	XXX	XXX	XXX	XXX
MGP Ingredients, Inc.	XXX	XXX	XXX	XXX
CropEnergies AG	XXX	XXX	XXX	XXX
Sedamyl S.p.A.	XXX	XXX	XXX	XXX
Crespel & Deiters GmbH & Co. KG	XXX	XXX	XXX	XXX
Kröner-Stärke GmbH	XXX	XXX	XXX	XXX

Source: XXX

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Vital Wheat Gluten Market Forecast and Opportunities

Global demand will rise from USD XXX billion in 2025 to USD XXX billion in 2031. Volume growth will remain anchored in bakery and flour correction, while favorable mix effects will come from customized functionality, organic certification, pet nutrition, aquafeed and meat-alternative systems. Asia-Pacific will contribute the largest portion of incremental volume, while Europe will remain the leading production and export platform.

The central forecast assumes normal wheat availability, continued expansion of packaged bakery production and measured recovery in plant-based protein launches. A high-growth scenario emerges if high-speed bakery investment, aquaculture output and hybrid meat adoption accelerate simultaneously; a lower-growth scenario would follow sustained wheat-price inflation, weak consumer demand and aggressive substitution by alternative proteins.

Winning suppliers will combine integrated feedstock economics with consistent viscoelastic performance, customer-side formulation support and resilient regional inventories. Carbon intensity will become a more visible procurement variable as multinational food companies extend Scope 3 targets into ingredient supply chains. Producers able to document energy savings and optimize rail or ocean logistics will gain an advantage in long-term contracts.

Opportunities

- Customized gluten grades for automated high-speed bakeries
- Texturized wheat-protein systems for whole-cut meat alternatives
- Low-carbon gluten produced with heat recovery and renewable energy
- Locally warehoused supply for import-dependent baking markets
- Functional blends for aquafeed and premium pet nutrition
- Organic and identity-preserved non-GMO product lines

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