



# TRansition paths to sUstainable legume-based systems in EEurope

## Exploring business cases for legume-based products – Lessons learned so far

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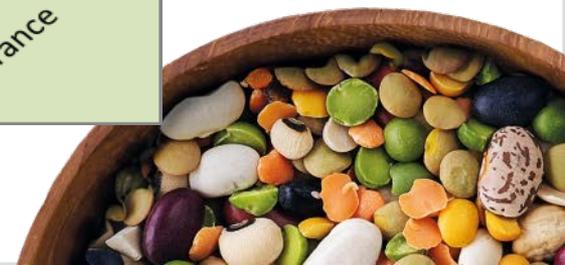
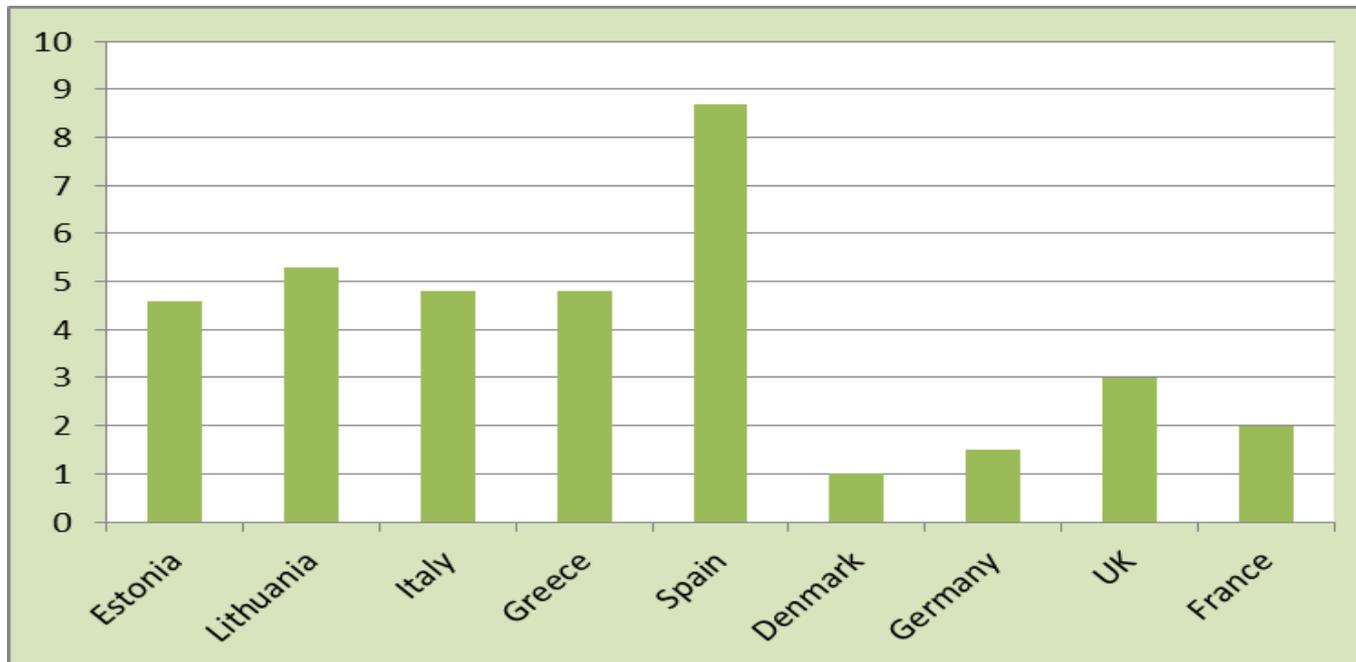
# Markets and supply chains for legume-based products





# Consumer trends and legume-based products

- Mega-trends impact on demand: Health, Convenience, Indulgence
- Traditional / Innovative / Trendy products
- Intake of pulses vary greatly (*kg pulses per capita per year*)





# The Vegetarian Butcher (NL)

## From start-up to part of multinational business

- Originated from organic farm in 2010
- Plant-based meat alternatives
- Uses soybeans, peas and lupines
- Strong brand in the Netherlands
- Exports to 17 countries in Europe
- Innovative and *”a good story”*
- Acquired by Unilever 2018



[www.thevegetarianbutcher.com](http://www.thevegetarianbutcher.com)





# Pea protein ingredients – the case of Roquette

- French family-owned bio-based business
- Yellow peas for food and feed ingredients
- New factory in Canada (2019), 150 new jobs
- Contracted farmers
- Global market approach
- Technology-driven innovation



[www.roquette.com](http://www.roquette.com)





## Frozen vegetables – peas and beans

- Branded products and private labels
- Contracted farmers and imports from non-EU countries
- Traditional product in established market – is that all?
- There is news:
  - New varieties of beans (Edamame)
  - New products
  - Certified products: organic, sustainability schemes





# Building a business centered round a specialty crop

## The pioneer Lauteracher Alb-Feld Früchte

- Organic farm in Schwabian Alps since 2001
- Specialty crop: local heritage variety of green lentils (2006)
- Cooperative of 80 organic farmers to grow the lentils on 280 ha
- High-quality brand for local distribution and webshop



[www.lauteracher.de](http://www.lauteracher.de)





# Business case for organic protein from clover grass

## Challenges

- Quality assurance of fresh-cut clover grass
- From field to processing logistics
- The bio-refining process and the scaling-up
- Proof of the feed value
- Finding customers willing to try a new feed protein
- Gaining market acceptance

## Opportunities

- Growing demand for organic feed protein
- Organic protein is more expensive than conventional protein
- Transportable format opens up the market
- Local production and circularity appeal to organic farming
- New business case for organic farmers (pig producers and grass producers)



## Concluding remarks

- The market for plant-protein is growing and will expand further
- MANY opportunities for new business cases
- Challenges and opportunities need to be identified for each business case
- A **resilient** supply chain is a must for a **viable** business case
- *”The devil is in the detail ”*– a **vulnerable** supply chain can easily **bring down** an otherwise prosperous business case





# Thank you for your attention

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Many thanks to the TRUE partners who have contributed with research about markets and supply chains

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