

Case Study

Enabling Market Entry:

How We Helped Navigate the
Regulatory Landscape for Alternative Proteins



Client's Objective

The client sought to understand the evolving regulatory landscape for alternative proteins across key global regions, including North America, Latin America, the European Union, Asia Pacific, and the Middle East & Africa. Their focus was on approval pathways, labeling requirements, government incentives, and the key drivers and barriers impacting industry adoption across plant-based, cultivated, microbial, and insect-based protein clusters.

Our Strategic Approach

To support the client in making informed decisions, leB employed a research-driven, impact-focused methodology around:

Regulatory Assessment

We analyzed regulatory frameworks, approval pathways, and labeling requirements across key regions, offering the client a clear compliance roadmap for each protein cluster.

Investment and Commercialization Trends

We assessed investment trends in R&D and commercialization, and identified regulatory feasibility along with the areas of government support.

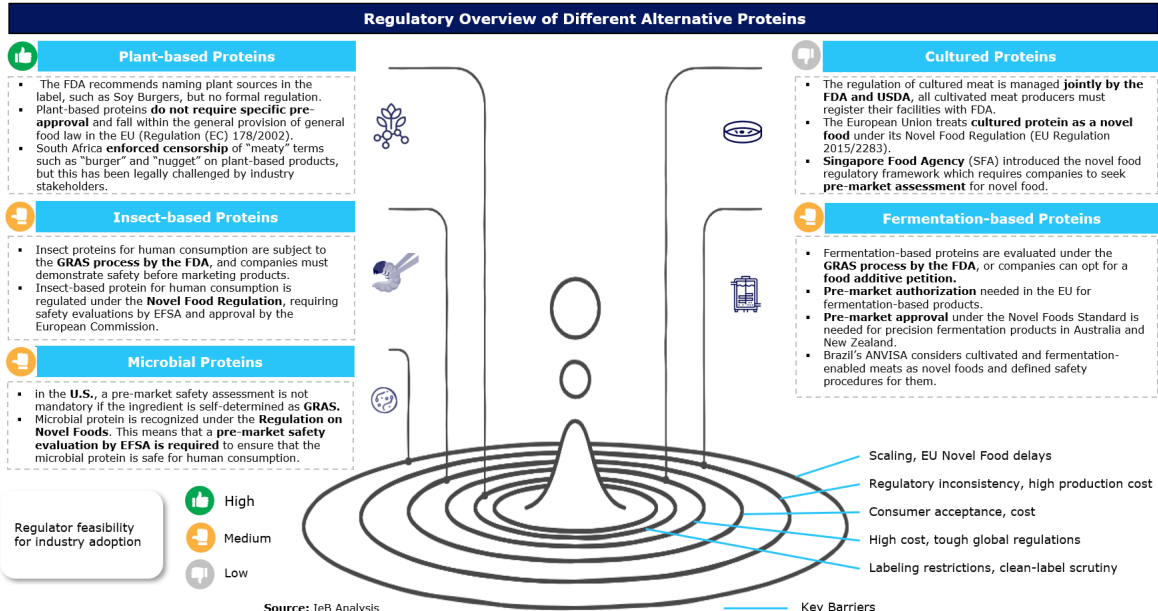
Geographic Prioritization

We identified high-potential regions for alternative protein commercialization based on regulatory support and incentives.

Snippet

Regulatory Framework for Alternative Proteins

Analyst Comments: Each type of alternative protein faces unique regulatory frameworks focused on safety and labeling. While plant-based proteins fall under general food laws; insect, microbial, fermentation, and cultured proteins require more rigorous safety evaluations and pre-market approval, with specific regulations varying across regions.



Regulatory Support for Alternative Proteins

Analyst Comments: The US, UK, and EU have implemented regulations for alternative proteins and are working to refine them, while countries like Australia, Israel, and Brazil are still developing regulations for microbial and insect-based proteins. The Plant-Based Foods Association (PBFA) in the US is making progress in securing USDA incentives for farmers producing ingredients for plant-based foods.

Regulatory Support Across Regions								
Region → ↓ Regulatory Aspect	US	Canada	EU	UK	Singapore	Australia / New Zealand	Israel	Brazil
Regulation on plant-based protein	✓	✓	✓	✓	✓	✓	✓	✓
Regulation on cultured protein	✓	✓	–	–	✓	–	✓	–
Regulation on fermented-based protein	✓	✓	✓	✓	✓	✓	✓	✓
Regulation on microbial protein	✓	✓	✓	✓	✓	✗	✗	✗
Regulation on insect-based protein	–	✗	✓	✓	–	✗	✗	✗
Plant protein farmer incentives	–	✓	–	–	✗	–	✗	–
Support for research & development	✓	✓	✓	✓	✓	✓	✓	–

✓ Achieved – Making Progress ✗ Not Achieved

Source: IeB Analysis

Client Impact

- The client gained insights into the regulatory frameworks for alternative protein clusters and identified the most promising cluster for industry adoption.
- The client gained an overview of the regulatory pathways, labeling requirements, and investment trends in research & development versus commercialization across alternative protein clusters.
- The client prioritized key geographies for insect-based protein development and commercialization based on regulatory support, incentives, infrastructure, and funding.

Conclusion

Through our in-depth regulatory research, investment analysis, and strategic prioritization, we not only provided the client with a roadmap for alternative protein adoption but also empowered them to align their business strategies with evolving regulations, optimize market entry strategies, and capitalize on emerging opportunities within the alternative protein ecosystem.

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