The rise of protein nationalism:
States are reshaping protein production

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Executive summary

The last quarter of 2026 and early 2027 will be defined by structural upheaval. Wars and tariffs will continue to disrupt agricultural supply chains, and the current El Niño event, forecast to persist into spring 2027, will bring extreme weather patterns and disrupt growing seasons. Such stresses on food production coincide with historically high global protein demand, as protein-rich diets move into the mainstream and are adopted by growing urban populations with rising incomes.

The combination of increased demand, production and transportation interruptions, and broader geopolitical fragmentation is laying the groundwork for what we call “protein nationalism”: the use of state control over production capacity and exports as a political lever within and between countries.

The rise of protein nationalism is a global phenomenon, reflected in agendas ranging from the Make America Healthy Again (MAHA) movement to the Chinese Communist Party’s 15th Five-Year Plan (FYP). But timelines and trajectories differ. In this report, we will examine these differences, taking a broad view of proteins (animal products, lab-grown meat alternatives, protein supplements, and protein-fortified staples). We will conclude with future scenarios and their implications across sectors.

Key takeaways

- Protein demand is rising because of food trends and dietary recommendations, along with longer-term structural shifts such as aging societies and urban populations with rising incomes. Based on these trends, we expect increased protein demand to continue to intensify through the end of the decade.
- China’s protein imports will decline, and the country will soon begin to compete on exports; this pivot from China being the world's largest protein importer toward self-sufficiency and eventual export leverage directly threatens the feed and protein exports of Brazil, Argentina, the US, Australia, and New Zealand.
- By early 2027, as high protein demand, trade wars, and climate-driven supply disruptions converge, protein will emerge as a contested strategic resource, spurring increased state intervention in protein production systems alongside further import and export controls.

Consumer protein demand is reaching new heights

In the first half of the 2020s, high-protein diets became mainstream, a trend reinforced by social media. The Covid-era shift toward health consciousness ushered in a widespread increase in gym attendance and macronutrient counting as part of urban, middle-class lifestyles. High-profile influencers and podcasters have helped globalize this trend. The overall market has moved from protein supplements to embrace protein-fortified consumer staples such as cereals and energy bars. Current social media phenomena such as looksmaxxing, an internet subculture where young men document efforts to transform their looks through sometimes extreme measures, show we are still deep in the trend cycle.

In the second half of the 2020s, the protein trend is crossing from lifestyle to politics to policy. In the US, Secretary of Health and Human Services Robert F. Kennedy Jr.'s political identity and MAHA platform principally based on promoting healthy eating and exercise. Political-right manosphere podcasters and so-called tradwife influencers have promoted carnivore diets. On the left, protein supplements (sometimes plant-based) are central to fitness and wellness culture. The 2025-2030 US Dietary Guidelines, which Kennedy oversees, formalize the shift, raising the recommended daily protein intake from 0.8 g/kg of body weight to 1.2–1.6 g/kg and rehabilitating full-fat dairy and animal fats.

Functional nutrition is likely to become a dominant public health policy globally. High-protein dietary recommendations, such as the one implemented by Kennedy, are part of a broader movement by public health authorities toward functional nutrition and preventative care. This approach is attractive to fiscally pressured public health systems looking to reduce spending on patient care, and is likely to see wide adoption in both developed and emerging markets in the coming decade amid public budget constraints.

Pharmaceutical companies are beginning to shape appetites through GLP-1s. Weight loss drugs are emerging as an important influence on consumer demand for various foodstuffs. A recent Gallup survey shows 11% of US adults taking GLP-1s in 2026, up from 3% in 2024. The UK, Germany, Japan, India, China, and the Middle East are also experiencing steady growth in GLP-1 use, a trend expected to continue to 2030 and beyond. GLP-1s reduce overall food intake and, notably, clinicians recommend GLP-1 users with reduced appetites prioritize protein.

Protein demand is likely to remain high as structural and demographic shifts reinforce food trends and dietary recommendations. Urbanizing middle classes are adopting high-protein diets as a cornerstone of new exercise and lifestyle habits. Older consumers (a growing proportion of the population) are prioritizing protein intake to avoid muscle loss. Both these factors, alongside weight-loss drug adoption, are expected to remain significant well into the 2030s, with protein demand remaining correspondingly high.

Table 1: New drugs, dietary guidelines, and changing demographics are driving growing protein demand

Driver	Mechanism	Time horizon
GLP-1 adoption	Muscle-loss risk converts protein from preference to clinical need New oral formulations will broaden uptake	2024–2030
US dietary policy	2025-2030 Guidelines almost double recommended daily allowance to 1.2–1.6 g/kg MAHA rehabilitates animal protein Other countries likely to follow US signal and adopt similar new guidelines	2025–2030
Ageing populations	Higher-income markets require increased protein intake to offset muscle-loss risk	Ongoing
Urbanizing middle classes	Income-driven dietary shift toward animal protein in emerging markets	Ongoing
Functional nutrition policy	Governments adopt protein recommendations as public health spending decreases	Ongoing

Producers are beginning to increase supply but social-media driven demand signals and agricultural cycles are on different timelines. For example, whey, once treated as a low-value cheese byproduct, is now a commodity with high demand and a supply shortfall, thanks to its use in protein powders. Such a shift in demand, with a lag in supply due to the time required to adjust agricultural cycles, repeats the same pattern of social media-induced spike in consumer demand for items such as pistachios and matcha (though dairy production can be adjusted more readily than tree crops).

Alternative proteins are attracting investment, but adoption will be slow. Plant-based, fermentation-derived, and cultivated protein products are gaining shelf space and recognition. Their development is often backed by government and major food company investment, making continued steady growth likely. But none of the alternative meat companies are profitable yet, and high production costs, regulatory fragmentation (such as US state-level bans on cultivated meat) and consumer skepticism continue to slow mainstream adoption. These constraints mean that alternative proteins will not displace animal agriculture in the near term.

Converging pressures on protein supply are spurring state intervention

In early 2027, geopolitical disruption and climate events will continue to strain agricultural production globally. Fertilizer and energy costs are expected to remain chronically volatile into 2027, due to the ongoing closure of the Strait of Hormuz and diminishing buffer stocks. The strongest El Niño on record is also forecast to peak next year. Because many protein producers are actively scaling, they will be especially exposed to these forces.

Eurasia Group has described the current era as the GZERO world. Today, no single country or group of countries leads the world politically. As a result, diplomatic processes are weakened, and global free trade is increasingly fragmented. This is driving the rise of political populism and nationalism, protectionism, tariffs, and import-substitution industrialization worldwide.

Geopolitical fragmentation and increased protein demand are together leading to what we have termed protein nationalism. Protein is increasingly the defining commodity of food sovereignty, with protein supply becoming an effective lever for governments to flex their muscles. Control of production capacity and exports is emerging as a tool of global soft power as well as a way to assign benefits domestically.

Stefano Moritsch

Global Head of Geopolitics KPMG INTERNATIONAL

> We've entered a new era of geopolitical competition: a fractured global order where national security and national interest routinely outweigh international cooperation. This is especially true in critical supply chains like protein. Today, protein is emerging as a strategic asset, not unlike rare earths: a resource to be controlled, not necessarily shared. But unlike minerals, protein depends on complex living systems, making the race for protein self-sufficiency even more unpredictable. Expect governments to prioritize resilience and onshoring in the protein sector, leveraging technology and new production methods to reduce foreign dependence. Conventional alliances will take a back seat to zero-sum strategies. In the age of geoeconomic fragmentation, food security is less about equitable access to nutrition and more about power. Internationally, producing nations can wield protein exports as an instrument of influence, and domestically, as a tool of food security–a precondition for order.

Governments are intervening in protein production and trade

State intervention in protein production is increasing and will intensify. National-level protein-related policy has spiked in 2026. Policies and state investment aim to increase domestic animal protein production and reduce imports to improve trade competitiveness and boost technological innovation and alternative protein production. This trend will continue into 2027.

Table 2: Protein policy interventions have spiked in 2026—and more are coming

Region/country: Policy development (year of adoption)	Protein nationalism angle
Netherlands: National Protein Strategy (2020)	Reduces import dependence by scaling domestic protein crop cultivation and alternative protein sources; positions the Netherlands as a first mover on alternative protein technology; sets 50/50 animal-to-plant protein diet target by 2030; requires protein-rich animal feed to come predominantly from within the EU by 2025
Denmark: Action Plan for Plant-Based Foods and Strategy for Green Proteins (both 2023)	Plans work together to increase production, domestic demand, and exports of Danish plant-based proteins (among other plant-based foods), and position Denmark as a first mover on technology with a €168 million public investment fund
UAE: National Food Security Strategy 2051 (2018) + $500 million biotechnology production facility (announced 2024)	Goal to increase domestic food production to 50% by 2051 and rank first on the Global Food Security Index through alternative protein investment, amid water and land scarcity.
UK: UK Food Strategy (2025) + National Alternative Protein Innovation Center (launched 2024)	Frames alternative protein as an industrial competitiveness and food security imperative and aims to make the UK competitive in alternative protein technology innovation
India: Mission for Aatmanirbharta (self-reliance) in Pulses (2025-2030, adopted 2025)	A $1.3 billion scheme aimed at achieving self-sufficiency in pulses by December 2027; meant to reduce import dependence on countries including Canada and Australia
South Korea: Food Tech Industry Promotion Act (2025) + Research Centers (2026–2027)	Establishes food technology as a national strategic industry; research center for plant-based proteins opening in 2026; and a second center focused on cultivated meat opening in 2027; seeks to position the country as a rule-maker in global alternative protein standards
US: Dietary Guidelines for Americans 2025–2030 (published 2026)	Raises the federally recommended daily protein allowance from 0.8 g/kg to 1.2–1.6 g/kg and recommends animal protein; embeds high-protein norms in school lunch programs, military rations, and federal food assistance
US: Plan for American Ranchers and Consumers (2025) and Ranchers First Initiative (August 2026)	Attempt to increase the amount of beef grown in the US to reduce import reliance and bring down consumer prices
EU: European Protein Plan (2026)	Frames protein supply as a strategic autonomy issue and aims to reduce import dependence; targets increasing the EU's share of domestically produced protein in animal feed from 25.8% to 35% by 2035

China: 15th Five-Year Plan (2026–2030; adopted 2026)	Treats food security as a near-defense priority, with a long-term goal of converting China from the world's largest protein importer into a net exporter (see table 3 below)
Canada: National Food Security Strategy (2026)	Frames Canada's existing status as the world's leading pea protein producer as a strategic national asset to be expanded and vertically integrated domestically (rather than exported as a raw ingredient); designed to reduce dependence on US food imports and increase alternative protein export capacity
Japan: Agricultural Research and Innovation Strategy (2026)	Targets tripling agricultural and food export value by 2030; biomanufacturing capacity explicitly framed as national security infrastructure
Australia: National Food Security Strategy (expected Q4 2026)	A defensive response to the threat of Chinese import substitution eroding Australia's largest agricultural export market; attempts to reframe Australia's position toward value-added protein processing and diversified export markets, including alternative proteins
China: Cultivated meat commercial regulations (expected late 2026)	Creates a domestic regulatory framework to permit the commercial sale of cultivated meat; frames cultivated meat as an instrument of self-sufficiency by reducing dependence on livestock imports
Singapore: Feed and Feed Ingredient Technology Center (launch 2027)	The center will focus on alternative protein sources (insect-based, single-cell) for aquaculture feed, positioning Singapore as a regional hub for sustainable aquaculture inputs

President Donald Trump's administration is using beef policy to support domestic farmers and foreign allies. The US Department of Agriculture's (USDA's) "Plan for American Ranchers and Consumers" (2025) and "Ranchers First Initiative" (August 2026) are both intended to grow the US cattle herd, which sits at a 75-year low. This is done through loan guarantees, expanded grazing access, and antitrust scrutiny of the major meat packers. The USDA plans explicitly reference the new dietary guidelines as a way to drive up demand. For the Trump administration, both the revised dietary guidelines and these USDA policies serve as tools to increase political support among farmers and ranchers.

At the same time, the administration is using beef import tariff relief to support President Javier Milei's like-minded regime in Argentina. In February 2026, it quadrupled Argentina's duty-free quota from 20,000 to 100,000 metric tons. The initial announcement of the move coincided with a $20 billion currency swap ahead of Argentina's October 2025 midterm elections, making clear that the beef concessions were driven by the Trump-Milei alliance. In September 2026, the administration expanded tariff-free beef imports from select countries (with Brazil as the primary beneficiary) to 300,000 tons to try to lower consumer prices ahead of the midterm.

The administration has come under criticism from domestic producers for increasing import quotas. Nevertheless, this attempt to balance policies that support domestic producers and foreign allies shows the administration sees beef supply as a useful political lever.

The Netherlands, Denmark, the UK, South Korea, and Singapore are attempting to lead in alternative proteins with state investment. All these countries have announced major investments in research, technology development, and production. China has also made alternative protein leadership a priority in its 15th FYP. The UAE's National Food Security Strategy 2051, launched back in 2018 and expanded since, frames alternative protein development to ensure food security amid water and land scarcity concerns.

China's treatment of protein as a national security issue will reshape global protein trade. China has gone from being a net food exporter in 2004 to being the world's largest importer of meat, dairy, and feed, and running a food deficit of roughly $150 billion a year. Beijing is now trying to reverse this trend. Its 15th FYP places food security close to defense as an existential priority. It targets self-sufficiency through genetically modified seed development, agricultural land expansion, industrial-scale fermentation and cellular agriculture, and a push into amino acids and biomanufacturing.

China's long-term goal is export leverage. Beijing is hoping to lower import dependence substantially by 2030. Beyond that, poultry, dairy, eggs, aquatic products, and alternative-protein inputs will be targeted for export. First-order consequences will fall on Brazil, Argentina, the US, Australia, and New Zealand, in the form of decreased Chinese demand for feed and soy imports and, eventually, state-backed Chinese competitors entering global markets.

Table 3: China's 15th Five-Year Plan aims to increase protein production

Instrument	Target
Genetically modified seed development	Domestic grain and soy yields
Agricultural land expansion	Desert and northern frontier cultivation
Precision fermentation and cellular agriculture	Alternative protein production
Amino acids and biomanufacturing	Industrial-scale input production
Export push: poultry, dairy, eggs, aquatics	Global protein markets

Implications for stakeholders

Protein nationalism is redistributing power across the food value chain. States hold tariff and subsidy power. Retailers and food safety regulators determine which proteins reach consumers, giving them leverage over farmers. Pharmaceutical and biotech companies are new entrants with GLP-1s and alternative proteins attempting to influence consumer preferences. Winners will be sectors that succeed at both shaping and responding to nationalized protein markets.

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Global Head of Agribusiness KPMG INTERNATIONAL

> There is a lot of conversation about the food sector at the moment. Consumer trends are shifting globally, GLP-1s are accelerating the demand for protein, and we are seeing countries directly frame food security as national security. However, the start of the value chain continues to be underrepresented. Farmers are facing both supply- and demand-side pressures to meet the needs of the market and their own families. Regardless of where you enter the conversation about the future of the food system, we need to adopt a systems perspective that puts farmers and growers at the center.

Table 4: Increased protein demand is reshaping the food value chain

Stakeholder	Core exposure	Strategic priority
Protein-exporting countries (Brazil, Argentina, US, Australia, NZ)	Risk of China import substitution eroding export revenues State-backed competition in third markets	Diversify export markets Invest in value-added processing Engage on trade standards
Protein-importing countries (Global South)	Price-taker status At risk of export restrictions and supply concentration	Regional supply cooperation Investment in domestic alternative proteins
Consumer and retail companies	Capital and crop cycle mismatch with demand signals Input cost volatility Reformulation costs	Flexible supply chain design Scenario-based planning Portfolio hedging across protein types
Farmers	Demand signals moving faster than planting and capex cycles Volatile fertilizer and energy costs Margin compression between rising inputs and concentrated buyer power	Diversify protein crop mix Reduce input dependency Treat land and water as strategic assets as their scarcity value increases
Multilateral environmental treaties (e.g. Montreal-Kunming biodiversity agreement)	Agriculture operating beyond planetary boundaries on water, land, and emissions	Shift incentives toward protein sources with lower resource intensity Price in externalities

Scenarios to 2030

The current moment is marked by a clear rise in protein demand and state intervention. Looking forward to 2030, there are various possibilities for how these forces will evolve. We model potential scenarios below.

The key variable across all four scenarios is the concentration of protein production. GZERO protein, meaning heightened and sustained protein nationalism, is Eurasia Group's basecase scenario. Concentration risk, free-trade protein, and demand collapse are less likely possibilities. The more production concentrates in a smaller number of states and firms, the more leverage those actors can exert over import-dependent markets and across their supply chain.

Table 5: Under the most likely scenarios, protein production will continue nationalizing, concentrating risk for import markets

Scenario	Signposts	Winners	Losers
GZERO protein (base-case,~60%)	New export restrictions and national protein supply policies across countries throughout 2027 Chinese soy and feed import volumes decline from 2027 onward Trade standards for alternative proteins diverge between the US and China	Capital-rich states Sovereign-backed companies Domestic producers in large markets Chinese state-owned companies	Import-dependent low-income countries Multinational food companies
Concen-tration risk (~20%)	A small number of protein producers account for a rising share of global processing capacity and capture dis-proportionate margin across the value chain Protein prices in importer Global South markets rise faster than general food inflation	The dominant protein platforms Private equity	Farmers Small and mid-size food companies Consumers in price-sensitive markets
Free trade protein (~10%)	WTO or G20 members adopt a binding food security agreement that limits unilateral export restrictions GLP-1 adoption rates in emerging markets accelerate, broadening protein demand globally	Food multinationals Protein-exporting nations	Countries slow to diversify supply Late-cycle capex builders
Demand collapse (~10%)	A major dietary policy reversal visibly shifts mainstream consumer messag-ing away from high-protein diets	Flexible brands Distressed-asset buyers	Late-cycle capex builders Contracted farmers Land converted to protein use becomes stranded assets

In scenarios where protein demand is sustained, the type of protein favored by consumers and policymakers will shape winners and losers. Sustained preference for animal protein advantages Brazil and the US, which together dominate global beef, poultry, and soy exports. A shift toward alternative proteins would benefit a different set of geographies: the Netherlands, Denmark, the UK, South Korea, and Singapore are investing heavily in research and production capacity and are positioned to lead in alternative proteins. Consumer preferences will be determined in part by government incentives and guidelines.

Table 6: Dominant protein preferences (animal vs. alternative) will shape the geographies of protein

Scenario	Signposts	Winners	Losers
Animal protein dominates (basecase ~70%)	US consumer demand for plant-based meat continues to stagnate Production costs for alternative meats remain high for several years Regulatory fragmentation makes it difficult to scale alternative protein across markets	Brazil, world's top beef & poultry exporter US, world's largest beef producer	Netherlands, Germany, China, Singapore, if heavy investment in alternative protein has limited payoff
Mixed proteins (~20%)	China finalizes rules allowing cultivated meat to be sold commercially The EU's July 2026 Protein Plan gets funding Climate shocks to Brazilian and US livestock in the next few years shake animal protein production	Brazil and US retain near-term animal protein advantage China and Netherlands lead alternative protein scaling	Countries without a clear position in either category US risks ceding long-run alternative protein leadership to China
Alternative protein transition (~10%)	China finalizing rules and opening its domestic market to cultivated meat US government reversing its sharp pullback in food biotech funding The cost of producing alternative proteins falls enough to compete with conventional meat on supermarket shelves	China, Netherlands, and Germany, due to major public investments Singapore, most advanced regulatory regime Canada, leads pea protein production	Brazil (climate-stressed livestock sector; land and water constraints mount)

Conclusion

We are in a new era of protein nationalism. The forces underpinning this movement, from consumer demand to demographic shifts to geopolitical fragmentation, are unlikely to abate in the next five years. Meanwhile, agricultural production will remain under compounding pressure from climate change and inadequate water management. Under these conditions, protein will be the defining commodity of food sovereignty in an era of trade nationalism and state competition.

As a result, expect rising price and supply volatility, more domestic subsidies and policy measures, and more use of agricultural production as a tool of trade relations. Policy and state investment will be very influential in the protein space, and the associated politics will be public and controversial – people care a lot about what they eat.

Isabelle Allen

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"Business leaders in all sectors have a lot to focus on right now. However, the relentless short-term pressures should not dominate the agenda to the detriment of continuing to step back and explore "what comes next?" Following on from the work we have done around food system resilience, and also the impact GLP-1s are having on the demand for functional nutrition, a natural next step is to explore how a vulnerable global food system intersects with a new set of geopolitical realities. From shifts in the origin and physical availability of protein to pricing, risk, and political sensitivity, a "global run on protein" would challenge long-held assumptions and orthodoxies used from strategy to procurement and supply chain. Stress-testing those will be an important part of business planning, as a number of fundamental shifts are likely in the coming decade.

This report is based on the opinions of Eurasia Group analysts and various in-country specialists. Eurasia Group is a private research and consulting firm that maintains no affiliations with governments or political parties.

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