



# ADM Global Trend Report

## Era of Infinite Choice

Today's consumers are embracing unprecedented choice with remarkable agility, creating a dynamic landscape where personalization and diversity flourish.





## Driving Growth in an Era of Infinite Choice

Rapid technological advancement and increasing diversification are reshaping how consumers make decisions across every aspect of their lives. While enduring considerations of health and wellness, environmental sustainability, and food security continue to impact choices, consumers are forging increasingly individualized paths to achieve their goals.

## Balancing Innovation and Tradition

Future consumers will navigate their choices through an intricate web of personal, cultural, and environmental considerations. From wellness regimens that incorporate AI-driven health hacks with ancient-wisdom inspired remedies to food choices that support local traditions while experimenting with diverse cuisines from around the globe, consumers are skillfully balancing innovation with tradition.

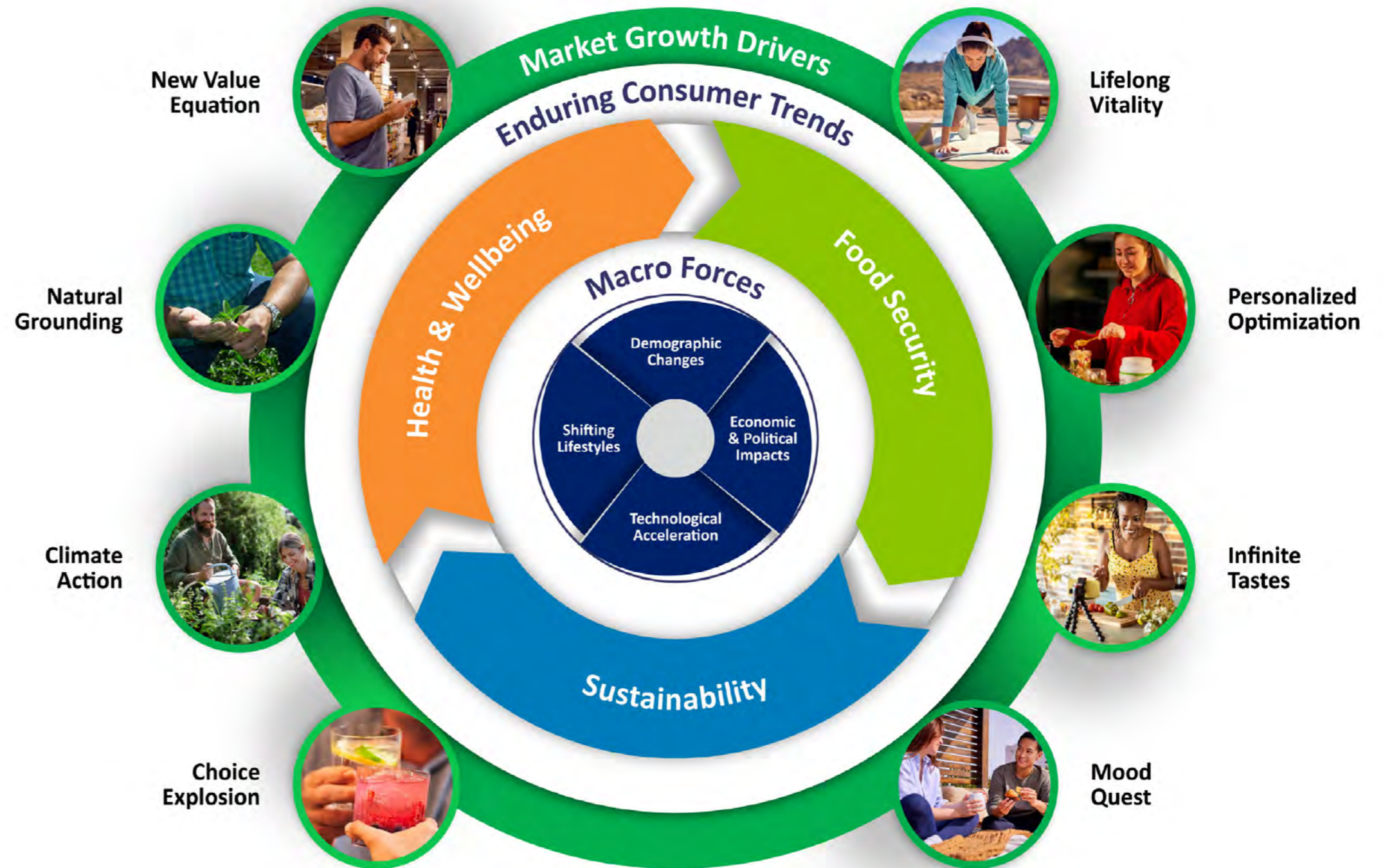
## Adapting to Consumers Evolving Motivations

At ADM, we empower you to meet the demands of this evolving, fragmented consumer landscape by developing solutions that adapt to their individual, changing needs across different life stages. By understanding and anticipating these evolving motivations, brands can transform fragmentation into connection. For those prepared to navigate this complexity, fragmentation is an opportunity to build loyalty and drive transformative growth in an increasingly diverse world.

[Discover more at  
ADM.com/trends](https://ADM.com/trends)

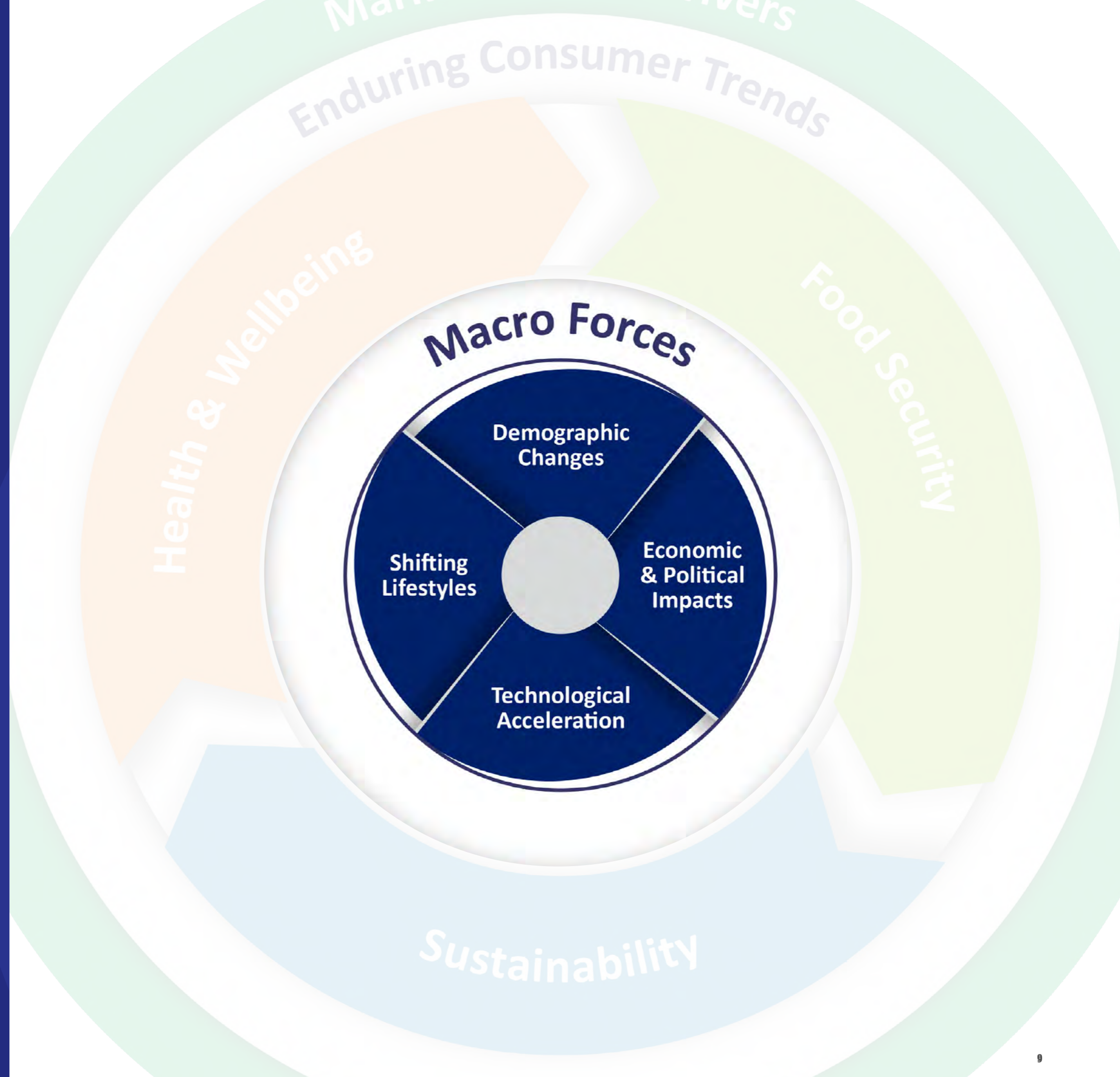
# 2025 Global Trends Framework

Driven by an enduring interest in health and wellness, environmental sustainability, and food security, consumers are redefining what matters most to them in an era of increasing diversification and technological advancement.



# Macro Forces Shaping Consumer Priorities

Broad cultural shifts influence how consumers are pursuing the aspirational trends of health & wellbeing, sustainability and food security.





**Climate-adaptive Lifestyles**  
**Mindful Living**  
**Time Shifting**

## Shifting Lifestyles

Proactive approaches to health, climate, and time management are affecting how people plan their time, show up in their communities, and choose products.



**AI-driven Development**  
**Workforce Revolution**  
**Digital Discernment**

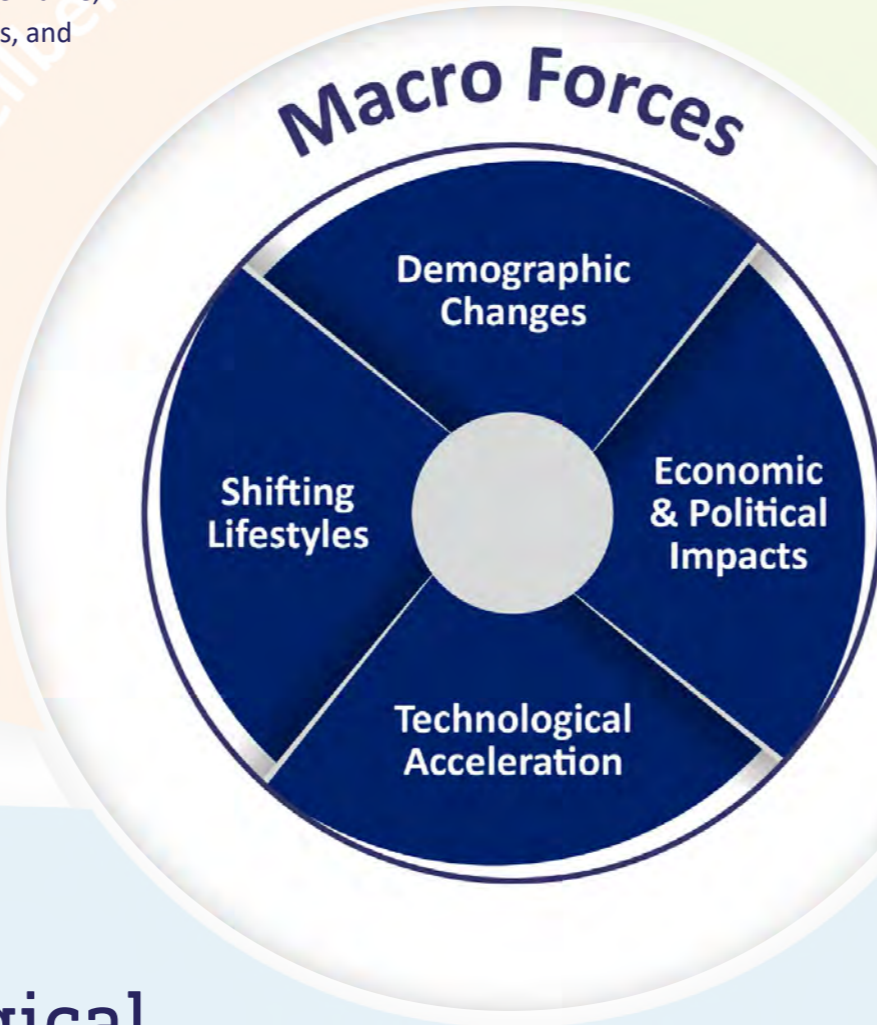
## Technological Acceleration

Advances in AI are now being applied at scale across societies, but companies and governments are under growing pressure to use tech for good.

Market Growth Drivers  
 Enduring Consumer Trends

Health & Wellbeing

Sustainability



## Demographic Changes

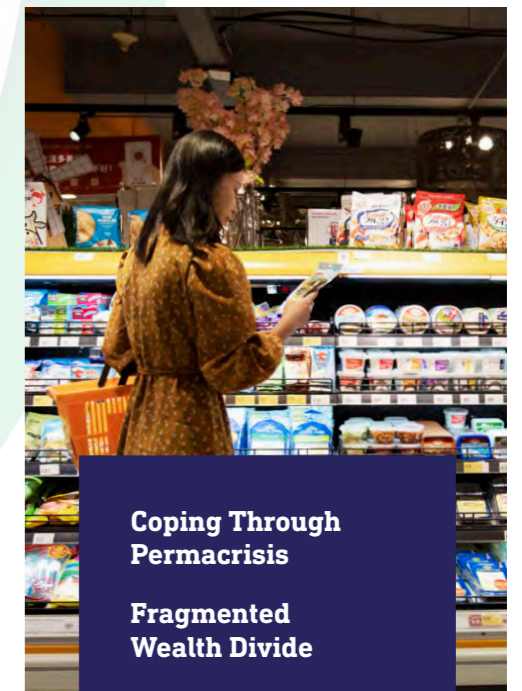
Changing social attitudes to life stages, aging, and generational divides are diversifying how people choose to live and the experiences they want.



**Defying Expectations**  
**Blurred Generational Lines**  
**Diverging Age Structures**

## Economic & Political Impacts

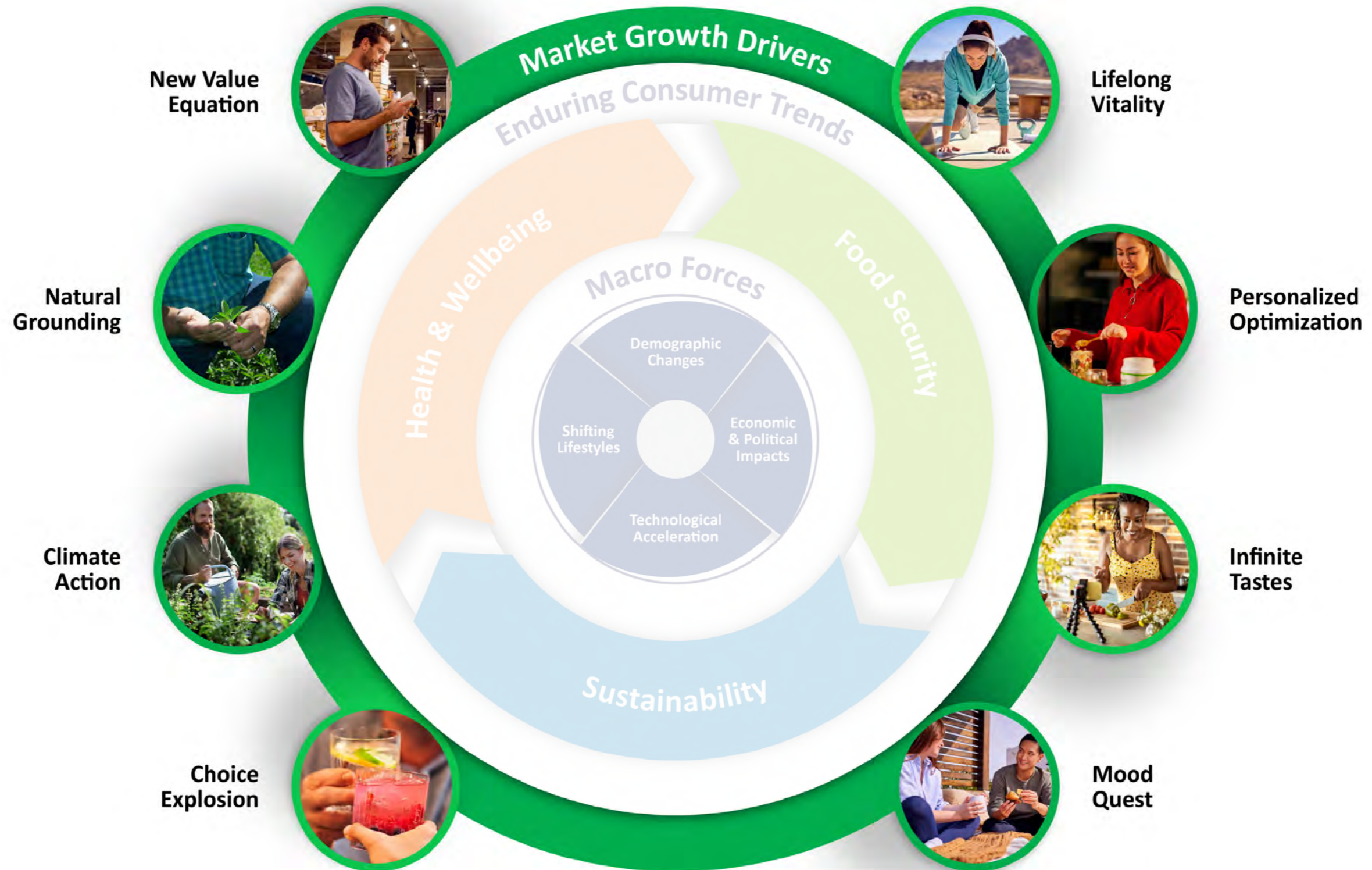
Economic and political impacts continue to be challenging for consumers, but after years of permacrisis and social unrest, outlooks have evolved.



**Coping Through Permacrisis**  
**Fragmented Wealth Divide**  
**Cultural Contraflows**

# Growth Drivers

Within our Global Trends Framework, we have identified eight evolving and often interconnected spaces that will drive Global Innovation and Market Growth.





# Lifelong Vitality

Health-conscious consumers across generations are taking a proactive, forward-thinking, and holistic approach to their wellbeing by focusing on vitality today and into the future. This attitude extends to pet owners, who are increasingly concerned with supporting their pets to live longer and more comfortably in old age. However, this is not a one-size-fits-all approach. For some, it means actively trying to delay the biological aging process to increase their healthspan. For others, it's about taking a gentler approach to remove unnecessary stress and promote overall wellness.

**43%**

of LATAM consumers (31% globally) looked to improve or maintain longevity in the past 12 months<sup>1</sup>

**78%**

of global pet owners are interested in products that may help increase the lifespan of their pet<sup>1</sup>

**47%**

of Younger Millennials, and 44% of Gen Zers in Germany would trust an AI tool to advise them on which vitamin, minerals and supplements to use (vs 24% of all)<sup>3</sup>

## Expressions

### Age Hacking



Driven by a desire to optimize longevity, consumers are exploring “age hacking”—techniques aimed at influencing biological aging. People are integrating both innovative approaches alongside traditional wisdom, such as sleep optimization and dietary habits from ‘Blue Zones’—regions where populations consistently live longer, healthier lives.

### Next-Gen Wellness



A new generation of parents is introducing wellness habits to Gen Alphas and Betas. Parents are purposefully prioritizing habits and foods that support cognitive development, emotional resilience, and physical ability from infancy onward. Gen Alpha is growing up with fundamentally different expectations around food and wellness, with a broader range of flavors normalized from early childhood.

### Soft Health



The demand for hyper-convenient, low-effort wellness solutions among busy urban workers is leading to a purposeful approach to health—one that is soft, kind to the self, and streamlined. People want staying healthy to be stress free, so they are opting for traditional relaxation practices. This trend extends to pet supplements where products like soft chews, designed to mimic treats, make administration easier.



## Why ADM?

### Integrated Wellness:

Innovative, differentiated, and future-forward dietary ingredients to meet the emerging needs of health-minded consumers.

### Microbiome Support:

Proprietary microbiome solutions and novel pre-, pro-, and postbiotic applications to meet consumers most-requested health optimization goals.

### Pet Health:

Functional, tailor-made food and treat solutions to optimize companion animals’ health for the long term.

### Animal Health & Welfare:

Next gen solutions to improve animal survivability and disease prevention.



# Personalized Optimization

Individuals will strive to reach their peak potential—through newly accessible, highly-tailored interventions. With extensive personalization now accessible to more people, consumer expectations are rising around optimizing food and drink experiences to suit their palates, performance ideals, and lifestyles are rising, creating new opportunities for food brands to build deeper relationships with consumers.



**74%**

Consumers in EMEA find the concept of “personalized nutrition” appealing<sup>1</sup>

**57%**

of US Millennials (54% in Europe) would be interested in non-alcoholic beverages with functional benefits for cognitive support/alertness /concentration<sup>2</sup>

**51%**

of UK consumers (aged 25-34) are interested in using injectable weight loss drugs (eg Wegovy)<sup>8</sup>



## Expressions

### Tailored Lifestyle Companions



**GROWING**

Consumers have become more aware of their individual needs, driven by increased media coverage of topics such as women’s health, growing fitness lifestyles, and the rapid rise of weight loss drugs (GLP-1s). As a result, brands that support these needs and offer holistic companion experiences—from education to specific nutritional needs—are gaining traction.

### Designing for Unique Palates



**EMERGING**

The personalized nutrition landscape is expanding beyond health and nutrition to customizing experiences by personal tastes. Innovations, such as digital cocktail machines that fine-tune drinks’ alcohol profiles and flavors, are heralding a new era of personalized consumption that goes beyond health, aligning culinary experiences with unique tastes.

### Peak Performance Enhancers



**GROWING**

From work to leisure, people are tapping into specialized enhancers to gain an edge and level-up their experience. Esports players and students are using nootropics to boost focus during games or exams, while exercise enthusiasts look to advanced supplements, nutrition, and hydration to support their performance.



## Why ADM?

### Health Solutions & Lifestyle Diets:

Technical and formulation expertise to deliver market-ready solutions for lifestyle diets.

### Addressing Specific Needs:

Science-backed ingredients to develop products that meet the needs of consumers taking GLP-1 medications for weight loss.

### Pet Wellness:

Extensive portfolio of wholesome, functional ingredients tailored to the life stage, health status, and size of the animal.





# Infinite Tastes

Driven by global migration, social media, and real-time digital discovery, cultural contraflows are accelerating consumers' curiosity for new food experiences. As these trends transcend borders, social connectivity and the cross-pollination of ideas fuels infinite new flavor fusions.

**72%**

of Global Consumers state that they like Food and beverages inspired by fusion cuisines from different parts of the world<sup>1</sup>

**45%**

of consumers in South Africa agree to the statement "I enjoy 'breaking the rules' when it comes to what I eat/drink"<sup>4</sup>

**61%**

of APAC Consumers (60% Global) consider themselves a "foodie"<sup>1</sup>

## Expressions

### Subverting Flavors



Progressive food and drink consumers are exploring innovative flavors and techniques that challenge convention and subvert expectations. Traditional flavors are being combined to create new, taste experiences. From strawberry gochujang sauce to Thai beef salad cocktails, people are prioritizing taste, fun, and unexpected combinations.

### Hyper-Local Pride



As people take increasing pride in their heritage and seek deeper connections with local communities, interest in authentic, traditional ingredients and practices is growing. People want to explore food and drink experiences that are distinct and specific to one region or town and tap into their desire for uniqueness and authenticity.

### Digital Fusions



Digital connectivity is accelerating the spread of new food cultures and driving creative cross-pollination between them. From eating the food featured in their favorite Turkish dramas to planning trips to visit the Japanese café they saw on TikTok, consumers are committing to 'living' their digital discoveries.



## Why ADM?

### Pulse on Flavors:

Diverse portfolio of flavors, formulation know-how, and a pulse on cultural trends to create on-trend, flavorful eating experiences.

### Ingredient Spectrum:

Pantry of foundational ingredients for culinary inspiration, including sweeteners, proteins, flours, starches, texturants, fats, and oils

### Regional Expertise:

Global innovation centers where our chefs and scientists create authentic solutions adapted to regional palates.



# Mood Quest

Against heightened levels of anxiety, consumers are chasing feel-good experiences. From mood-tracking apps to confidence-boosting 'neuroscnt' fragrances, neuroscience is going mainstream as people tune into their emotional landscape. It's not just about taste anymore - it's about engineering the ideal emotional experience. From apps to appetizers, we're seeing a new era of mood manipulation and sensory exploration.

78%

of Global Consumers agree that "Food is all about enjoying a multi-sensorial experience" (taste, smell, texture, sounds, etc.)<sup>1</sup>

47%

of US consumers are open to trying new alternative approaches to stress management<sup>9</sup>

56%

of Global Consumers consider indulgent foods and beverages an important part of a healthy, balanced diet<sup>1</sup>

## Expressions

### Dopamine Boosts



GROWING

With growing neuroscience literacy, some brands are positioning food and drink choices as tools for emotional regulation and neurochemical optimization. Consumers are seeking out specific ingredients to boost their mental states or dopamine levels, from mood-enhancing functional drinks to aid sleep, to skincare infused with stress-reducing scents.

### Feed the Vibe



GROWING

Amid rising pressures, food and drink indulgences become much needed, empowering micro moments of joy and self-care. From new elevated takes on nostalgic treats to the rise of mini formats that enable more frequent guilt-free treating, these reimagined treats allow people to have more moments of joy, more often.

### Digital Flavor



EMERGING

Advanced technology and artificial intelligence are being used with to create multisensory eating experiences and innovative flavors, from snack brands which feature fantastical flavors co-created with AI, to VR systems that enable people to experience any taste they desire.



## Why ADM?

### Deep Consumer understanding:

Global team of market and consumer insights experts who leverage up-to-date research methodologies to constantly understand consumer needs and market requirements around the globe.

### Novel Products:

From our groundbreaking new postbiotic to our novel botanicals, nootropic benefits can boost consumers' moods by supporting sleep and stress.

### Technical Expertise:

Formulation expertise to harness our broad pantry of ingredients to create delicious products that will excite consumers' senses.



# Choice Explosion

Individuals will strive to reach their peak potential—through newly accessible, highly-tailored interventions. With extensive personalization now accessible to more people, consumer expectations are rising around optimizing food and drink experiences to suit their palates, performance ideals, and lifestyles are rising, creating new opportunities for food brands to build deeper relationships with consumers.

**44%**

of European GenZers have reduced their alcohol consumption versus two years ago (vs. 36% of millennials)<sup>2</sup>

**63%**

of Global consumers would be interested in buying hybrid meat products<sup>1</sup>

**46%**

of French consumers who are taking steps to reduce/limit the amount of sugar in their diet try to get used to less-sweet flavors<sup>6</sup>

## Expressions

### Zebra Striping



**GROWING**

Led by Gen Z, consumers across demographics are adopting sober-curious mindsets, embracing flexible approaches like ‘zebra striping’ (alternating between alcoholic and non-alcoholic drinks) and taking sober months. This is creating a rise in interest in flavor profiles, ingredients and textures that create a sense of occasion, even when not alcoholic.

### Next Wave of Proteins



**ROBUST**

Consumer interest in protein persists, with searches for protein continuing to rise globally. With alt-proteins evolving from niche to norm—not just ethical—people are making flexible choices between different protein types. New menu options will continue to emerge, from animal and plant proteins coming together in hybrids to insect proteins or creative options with lentils and beans.



### New Sweet Palates



**GROWING**

New generations are growing up with different palates and expectations around sweetness and sugar content. Innovation is being driven by young consumers who want more choice and control - from classic sweetening sources to alternatives such as molasses and agave nectars. New profiles that balance savory or spicy with sweet or ‘swicy’ flavor are emerging.

## Why ADM?

### A Team of Experts:

Experienced flavorists, product developers, and mixologists, specializing in innovative, regional flavors and applications built on deep market knowledge.

### Plant-Proteins & Alternatives:

High-performing plant proteins and ingredients for both human and pet nutrition that provide alternative and hybrid solutions

for meat and dairy replacements with enhanced functionality or improved carbon footprint.

### Well-recognized Sweetener Portfolio:

Industry’s most comprehensive portfolio of sugars, sweeteners, and holistic solutions.



## Climate Action

In the face of escalating environmental challenges, consumers and companies are adapting to ensure food security while minimizing ecological impact. From harvesting food derived from greenhouse gas emissions to embracing waterless cuisine, these innovations reflect a growing awareness of climate-related risks. Such advancements represent a proactive approach to building resilience in our food systems, encompassing all stages from production to consumption.

**57%**

of Global Consumers agree that they are willing to drastically change their lifestyle to live in a more environmentally friendly fashion<sup>1</sup>

**69%**

of Germans believe the effects of climate change will impact the food and drink available in supermarkets within their lifetime<sup>7</sup>

**47%**

of Global Consumers intentionally avoid buying brands that do not have environmentally friendly initiatives<sup>1</sup>

## Expressions

### From Net Neutral to Positive



Consumers increasingly want brands to offer them climate hope and take positive steps to rebuild nature, rather than just minimizing their negative impact. Consumers want brands to take radical action, whether through making nature an official stakeholder, or starting ambitious regenerative farming transformations.

### Food Resilience



Food scarcity has started to feel increasingly real, as more people have now experienced it firsthand due to food supply chain restrictions. As people become more aware of the risk of future crop precarity due to climate breakdown, they will seek out resilient ingredients, support community food systems, and increasingly, grow their own.

### Climate Smart Cuisines



Going beyond traditional plant-based diets, consumers are embracing a more nuanced understanding of food's impact on the climate. They engage with restaurants and products that champion climate considerations, including zero-waste restaurants that use innovative composting machines to turn food scraps into soil within 24 hours.



## Why ADM?

### Advancing Regenerative Agriculture:

Engaged 2.8M acres under regenerative agriculture practices in 2023 that improve soil health, biodiversity, water quality, GHG emissions, and land resiliency. Targeting 5M acres in 2025.

### Environmental Impact:

Ambitious environmental impact targets across GHG emissions, water, energy

and waste, as well as investments in decarbonization technology and the use of biofuels and renewable electricity.

### Ecosystem Restoration:

Active work with local organizations to restore and reforest ecosystems and monitor animal activity, including providing a \$1M grant to the EO Wilson Biodiversity Foundation.



# Natural Grounding

Foods and ingredients derived from nature are seen in a new light, as brands innovate to create diverse culinary experiences and address consumer ideals and concerns through the power of plants. The duality of innovation and ancient wisdom meld as modern consumers repurpose time-tested remedies to tackle modern health challenges - offering powerful, nature-based solutions.

70%

of Global Consumers look at least sometimes for products that contain only recognized ingredients<sup>1</sup>

64%

of Global Consumers look for products from companies that support farmers and local communities<sup>1</sup>

70%

of Global Consumers agree that Food that is more natural is also more environmentally sustainable<sup>1</sup>

## Expressions

### Nature Re-mixed



Indulgent treat dupes that combine natural ingredients with ancient remedies appeal to health-conscious consumers seeking snacks and beverages that satisfy cravings while offering functional benefits. From plant-based snacks infused with adaptogens like ginseng and lion's mane to sparkling turmeric drinks made with ancient Ayurvedic spice blends, these innovations blend classic flavors with time-tested wellness ingredients.

### Diversifying Natural



Advanced extraction and formulation technologies are enabling unique ingredient combinations as consumers embrace a "more is more" approach to natural ingredients. Driven by the benefits of a diverse diet, they seek whole-food supplements, herbal extracts, and lesser-known indigenous ingredients.

### Rooted in Nature



In a world increasingly defined by technology, consumers are seeking a sense of natural grounding and authenticity. The growing demand for food traceability allows people to connect with the origins and provenance of their food, providing a counterbalance to the abstract, digitized nature of modern life.



## Why ADM?

### Natural Solutions Beyond Food:

Naturally-derived ingredients for better-for-you personal and home care products.

### Bountiful Botanicals:

Curated portfolio of flavorful and functional botanicals and the highest quality plant extracts.

### Sustainably Driven:

Comprehensive pantry of solutions focused on simple, recognizable ingredients, minimal processing, organic, and non-GMO sourcing, supported by a traceability program to ensure compliance with current legislation on social sustainability.



# New Value Equation

As consumers face varied and mounting financial challenges, the value equation they use to make food choices continues to evolve. Going beyond pure cost consideration, consumers are also evaluating time efficiency, healthfulness, satiation levels, and the need to treat themselves, as they make food choices that affirm their identity.



**44%**

of North American Consumers indicate, convenience is an important purchase driver for food & drink<sup>1</sup>

**60%**

of Global Consumers are willing to pay more for foods and beverages featuring functional/healthy ingredients<sup>1</sup>

**57%**

of Global Consumers say moments of indulgence for self-care purposes are important<sup>5</sup>



## Expressions

### Satisfying Status



Treat culture has become a non-negotiable for many consumers. From a great takeaway coffee to a mid-afternoon soda, these status purchases are part of identities and daily rituals, and have a value beyond cost and nutrition. Catering to different 'foodie' affinity groups, emerging innovations are tapping into this IYKYK (If You Know You Know) appeal.

### 360 Equation



Faced with time-crunched days and multiple pressures, consumers are balancing different needs when making food choices. 'Great value' does not just mean saving money, but it can mean saving time or mental effort. Balancing experience, convenience, and cost is a new 360-degree approach, where every meal or snack is evaluated holistically.



### Intuitive Add-ons



Consumers are embracing a positive shift in dietary habits, moving beyond restrictive and subtractive diets. From prebiotic sodas enhanced with traditional elixirs, like Korean pear juice, to tasty supplement bites that are power-packed with more than 20 whole-food vitamins, consumers are in favor of adding in functional extras that are easy to access and enjoyable to consume.

## Why ADM?

### Science-backed Solutions:

Well recognized ingredient portfolio, backed by scientific and technological expertise, helps to develop solutions for human as well as pet and animal nutrition from value oriented to premium levels.

### Next Generation Thinking in Animal Nutrition:

Next gen solutions and services, including nutritional insight, formulation, and feeding programs, focused on protein efficiency, animal health and welfare, and sustainability.

# About ADM

ADM unlocks the power of nature to enrich the quality of life. As an essential global agricultural supply chain manager and processor, a premier human and animal nutrition provider, a trailblazer in health and well-being, and a leader in sustainability, we're meeting critical needs while nourishing quality of life and supporting a healthier planet. Learn more at [www.adm.com](http://www.adm.com).

[Discover more at ADM.com/trends](http://www.adm.com/trends)



## Footnotes

- 1: ADM Outside Voice<sup>SM</sup> 2023 (22 countries)
- 2: ADM Outside Voice<sup>SM</sup> 2024 (US, UK, GER, ES, IT, PL)
- 3: Mintel Report: "Drive Sales of Beauty VMS by Focusing on Longevity", October 2024
- 4: Mintel Report "2025 Global Food & Drink Trends", September 2024
- 5: FMCG Gurus "Top Ten Trends for 2025", November 2024
- 6: Mintel Report "Sweet Flavour Innovation That is Not too Sweet" September 2024
- 7: Mintel Report "Sustainability in Food and Drink", Germany 2024
- 8: Mintel Report "Food and Drink Brands Must Pivot with GLP-1 Medication", 2024
- 9: Mintel Report "Managing Stress & Wellbeing", US 2024