



The Buzz on Blends

ADM OUTSIDE VOICESM The Future of Blends, Global Consumer Insights Report, March 2024



The Future of Protein Diversity is Now!

Consumers understand the impact of nutrition on their health and wellness.



57% of global consumers are looking to increase their intake of proteins.¹

They not only want to increase protein into their diets, but seek to incorporate more diverse protein sources. In fact, 88% of global consumers say it's healthier to get protein from a wider variety of sources.² How can we make it easier for them to achieve these goals?

By introducing blended meat products which harness the benefits of both plant and animal-based proteins, the food industry can offer the potential for more sustainable alternatives without asking consumers to radically change their diets.

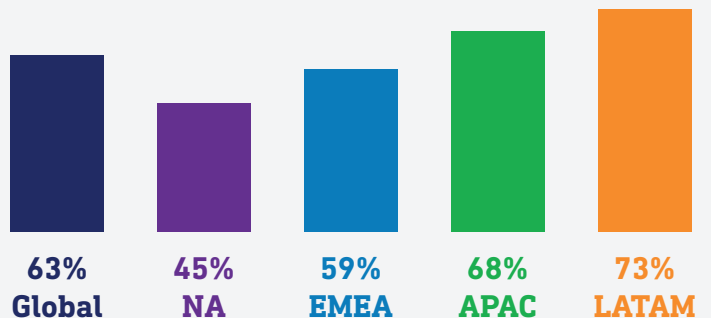
The Benefits of Blends (also known as 'Hybrids')

Attracting consumers to a purely plant-based diet proves challenging. Some have tried conventional meat alternatives only to feel disappointed with the taste and texture. Blends help expand a range of products to traditional meat-eaters by providing a friendly introduction to alternative protein sources. Additionally, they help address growing sustainability concerns amongst consumers.

This report delves into the dynamics of consumer perceptions, motivations and the burgeoning potential for blends. We conducted a comprehensive behavioral analysis to understand which product attributes consumers prefer. We put consumers in front of a virtual shelf to evaluate multiple meat, plant and blended products to learn from their responses.



Percentage of global consumers who find the concept of blended protein alternatives appealing.¹



Blends Open the Door to Plant-Based Nutrition

Blended plant + meat products provide consumers with straightforward, yet familiar, options to diversify their protein sources, while fulfilling their taste and texture expectations. Consumers clearly see the benefits, citing key motivators for potentially purchasing blends as:

1. Healthier
2. Better for the Environment
3. Adding Variety to Diets
4. Better Dietary Balance of Plant & Animal Proteins
5. More Nutritious

Consumer Feedback by Country



Healthier motivates US and Australian consumers most



Germans put more emphasis on the **environment** than any other country surveyed



Not surprisingly, given their extensive culinary background, **variety** appeals most to the French



Tastes like Chicken!

Top-ranked blended meat categories consumers gravitate towards

1. Chicken
2. Beef
3. Pork
4. Seafood

What's Cooking?

Consumers don't often make trips to the supermarket simply to wander aimlessly. When we go food shopping, we pretty much know what we want to buy before we even get there (with or without a grocery list!).

We decide what we want to buy depending on the occasion or meal.

Worldwide, Chicken Ranks #1

As consumers seek healthier alternatives, it's no surprise chicken comes in first for blended meat options across the globe with nuggets and tenders (in the US) as their preferred formats.

Price to Entice

In today's inflationary environment, price definitely plays a key role in consumer decision-making. Blends can exhibit greater price sensitivity compared to pure meat or plant-based products. Some blends could have the opportunity to carry a premium provided they solved a consumer need or problem in a particular way (like achieving an added health benefit by adding postbiotics). As a fledgling category, blends are not perceived as premium, because consumers have low awareness and do not yet have experience with the segment. Price should encourage trial. A positive experience will keep them coming back for more.



Variety is the Spice of Life So, Let's Mix it Up!

What's the ideal meat to plant-based protein ratio in a blended product? Across the US, UK, France, Germany and Australia, consumers prefer a higher meat-to-plant ratio.

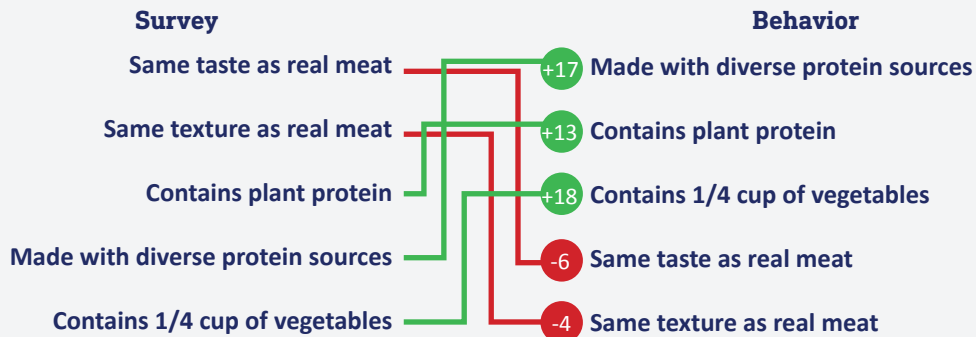
French consumers were also willing to go 50/50 with great potential. Consumers react positively to blends that include pea and soy proteins, as well as various other plant and vegetable ingredients.



Tie-Breaking Claims

How many times do we stare at the shelf trying to discern the difference between products? Consumers make their final decision by comparing claims. In the survey section of the study, we asked consumers directly what types of claims were most important to them when it comes to blends. Not surprisingly, taste and texture rose to the top, but this was before they saw the concepts. In some countries, things changed significantly when we exposed consumers to the virtual shelf. The behavioral analysis indicates 'protein variety' becoming an even bigger purchase driver.

Importance* based on:



Plant + meat protein blends need to achieve the taste and texture of real meat, but addressing the protein source makes a difference in on-pack claims.

* Show the most significant shifts between survey responses and behavioral data, but do not represent the full list of claims.



Home is Where the Hybrids are...

71% of global consumers prefer to cook blends at home

At the same time, 1/3 of consumers want to eat them when they are out & about. Blends represent a budding opportunity for both Retail and Foodservice.

Why ADM?

With the growing shift towards protein diversity, ADM is at the forefront of blended plant + meat innovation.

+ Cross-Functional Support from Idea Generation to Commercialization

From consumer insights, regulatory landscape navigation, technical formulation, and co-creation to commercial and manufacturing support, we are your dedicated partner every step of the way.

+ Premier Ingredient Pantry

We offer world-class functional proteins across soy, pea and wheat, as well as culinary-inspired flavor solutions and on-trend wholesome plant-based ingredients like beans, pulses, ancient grains, seeds and more.

+ World-Class Product Development Expertise & Technical Support

Our renowned technical expertise in both processed meat and meat alternatives paves the way for exceptional formulation, as well as speed to market.

+ Proactive Innovation Partner

We're further investing in new and expanded regional innovation centers to bring tomorrow's reality to you today.



Propel Your Protein Diversity Strategy with ADM.

Join us at our NEW Protein Innovation Center in Decatur, Illinois, USA or in Europe at our centers in Wageningen, Netherlands and Berlin, Germany.

You can also schedule a visit to our recently expanded customer innovation centers in Sao Paulo, Brazil, Singapore, and Shanghai, China.



We are where you are. Let's collaborate.
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¹ ADM OUTSIDE VOICESM, Global Lifestyles Research, 2023 (22 countries)

² ADM OUTSIDE VOICESM, Global Protein Consumer Discovery Report, February 2023 (5 countries)