



Elevate plant-based offerings with 8 key ingredients.

Treat consumers to a new standard of flavor and nutrition.





The plant-based movement continues to inspire an evolution in dietary habits and lifestyle changes across the globe.

A growing number of consumers are adding plant-forward products to their daily diets, driving the need for products that expertly blend nutrition with taste and texture to create delicious, consumer-preferred food and beverage offerings. ADM's portfolio of wholesome ingredients ticks all of these boxes, helping customers innovate what's next in protein nutrition solutions.

Consumers' proactive approach to health and wellness, combined with their increased awareness of the importance of nutrition, is fueling an increase in flexitarian lifestyles worldwide.



52%

of global consumers now follow a flexitarian diet¹



1 in 4 consumers say they're eating more plant-sourced protein versus the previous year²

¹ ADM Outside Voice™ Global Protein Occasion Study, October 2021

² International Food Information Council "Food & Health Survey" May 2021



What's driving the growth of plant-based ingredients?

- + Health & Nutrition
- + Sustainability
- + Clean & Wholesome Ingredients

It's increasingly common to see consumers taking a more proactive approach to supporting their health. Shoppers are consciously choosing to create healthier lifestyles that focus on a food's intrinsic nutritional value as well as the closer-to-nature origin of its ingredients that promote sustainable and traceable supply chains.



Meeting consumer demands for future forward plant-based nutrition.

Today's consumers are more aware of ingredient sourcing and manufacturing safety, leading to a corresponding rise in consumer demand for transparency and verification. We asked global plant protein consumers what they want to see in future plant-based food and beverage category innovation.³ The number one response was a desire for food safety certifications expressed by 54% of consumers, while 47% of consumers want brands to bring additional health benefits, beyond those inherent with plant protein sources into the finished products. Finally, 46% of consumers wish for greater transparency around sourcing and harvesting, and sustainability certifications.

With our direct connection to growers, ADM's customers have access to a wide array of vertically-integrated, high-quality plant-based ingredients that are already tested, verified, and certified for key standards such as sustainability. Our primary consumer research is key in setting the stage and providing an edge for our customers to deliver what consumers want: safety, transparency, and confidence in the plant-forward products they choose to consume.



Global consumer desires for plant-based food & beverage category innovation.



Food safety certifications



Plant-protein & additional health benefits



Sourcing and harvesting transparency



Sustainability certifications



Meeting consumers demands for nutrition, elevated taste and sensory attributes will be critical to further expand the category in the coming years as the space becomes more competitive.

³ ADM Outside Voice™ Global Protein Occasion Study, October 2021



Beans, pulses, ancient grains, and seeds – the ingredients fueling the plant-forward movement.

Beans, pulses, nuts and seeds, and ancient grains boast positive perceptions among global plant protein consumers and are growing in awareness and usage globally. These ingredients pack a nutritional punch, providing plant diversity and multisensorial taste and texture benefits to a variety of on-trend food and beverage applications. Consumers are already on board, with global plant-based consumers noting “health/nutritious” as the #1 perceived attribute associated with each of these ingredients.⁴

Meet the eight wholesome, plant-based ingredients ADM is leveraging to help formulators harness the power of the plant-forward lifestyle movement.



Chickpea



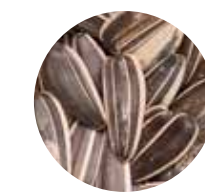
Black Bean



Navy Bean



Quinoa



Sunflower Seed



Pumpkin Seed



Chia Seed



Hemp Seed

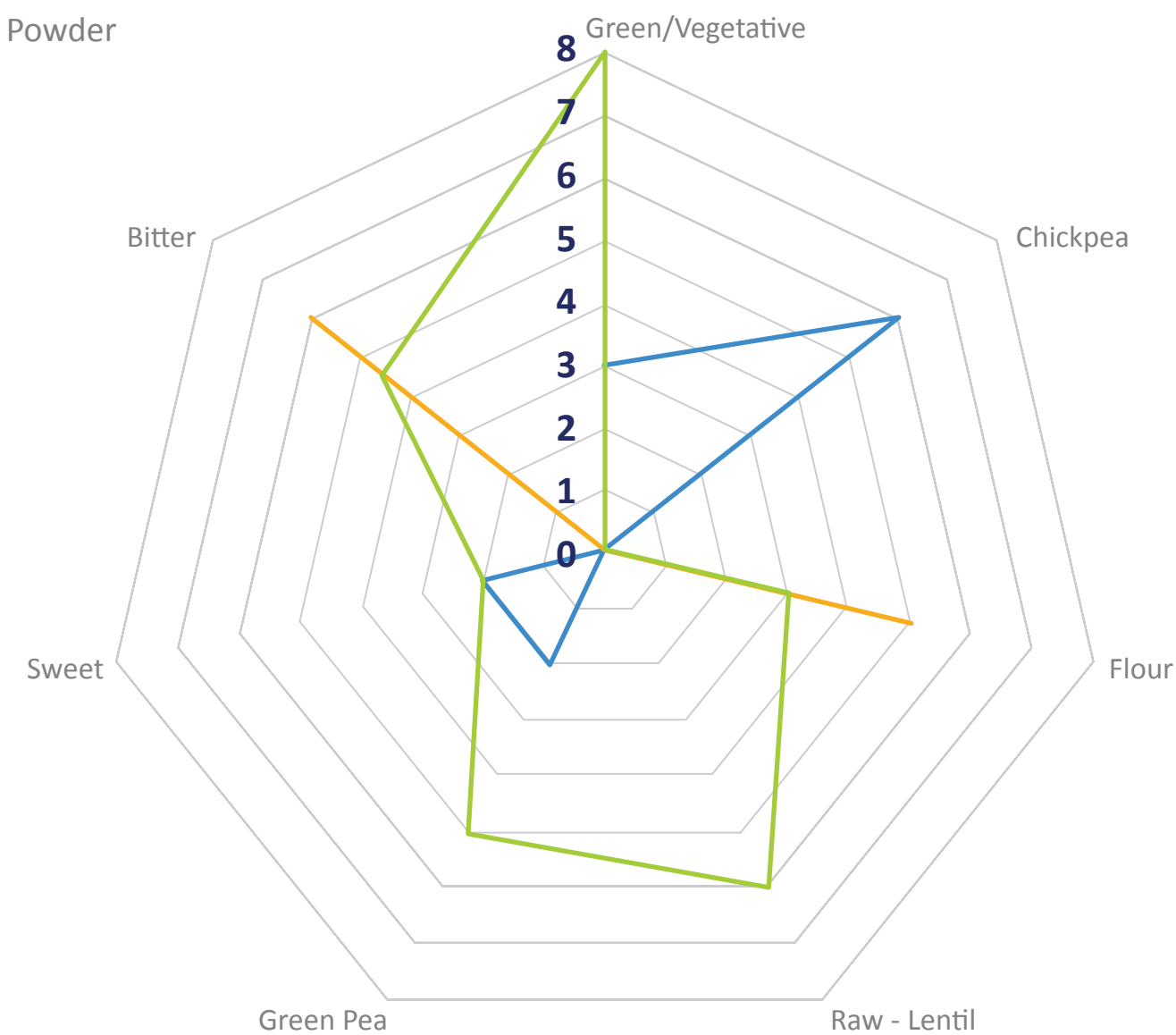
⁴ ADM Outside Voice™ Plant Protein Consumer Discovery, August 2020



Chickpea

Chickpeas are on trend and have the highest global consumer awareness levels of our eight wholesome ingredients. ADM's NutriStem™ Chickpea Powder is a great example of a consumer-preferred ingredient, as it was favored by all panelists over similar products from competitors⁵ and was the only option to “convey chickpea flavor without off-notes.”

— NutriStem™ Chickpea Powder
— Competitor A
— Competitor B



Chickpea Powder was preferred by all panelists. Here's what they told us:

"This is the only one that actually tasted decent."

"It has a clean finish. No off-notes."

"I liked the taste and smell of this sample better than the other two."

"Good consistency, flavor and aroma."

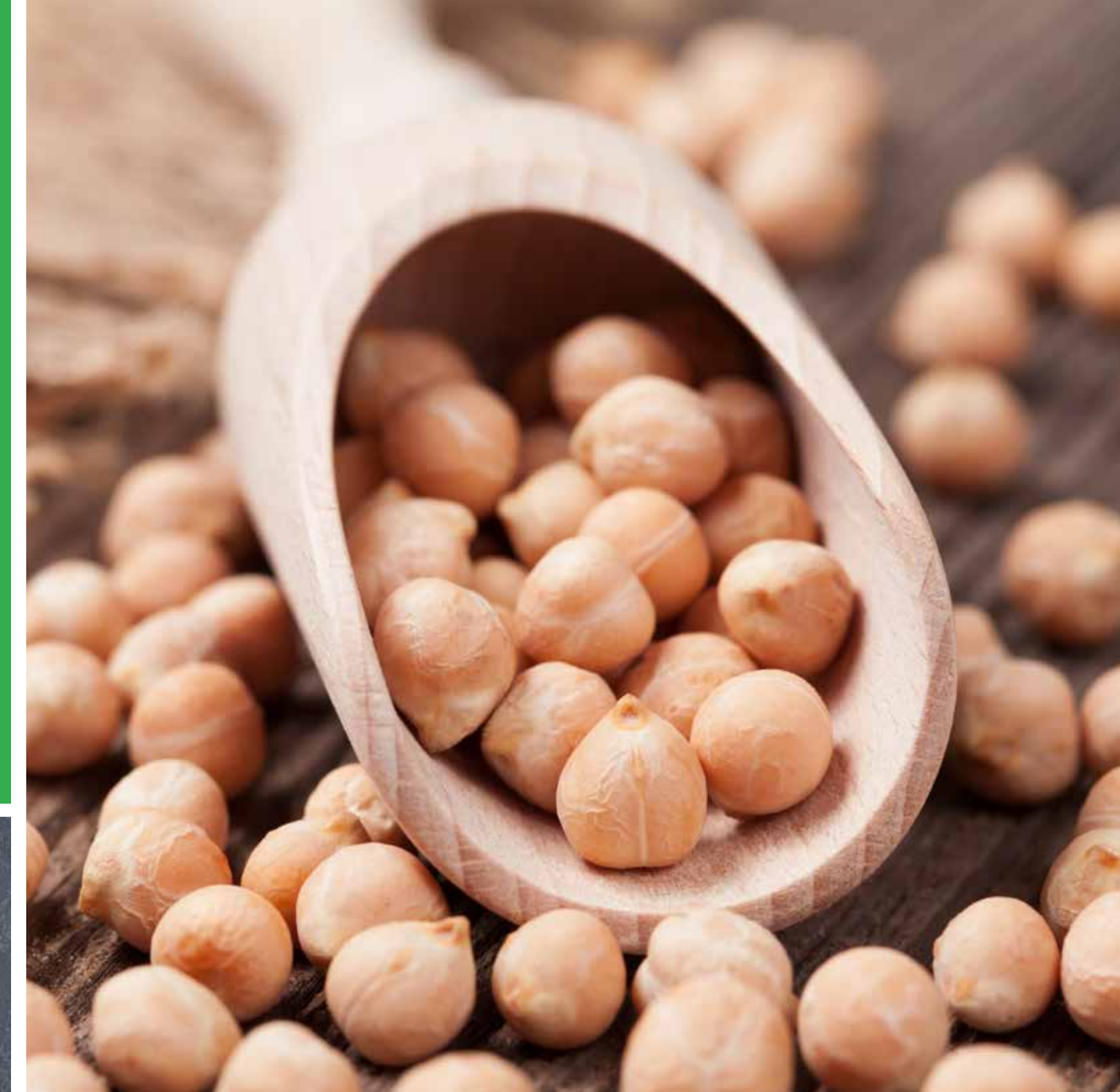
⁵ ADM Sensory Analysis, Chickpea Powder Preference Tests Report, June 2019

Global plant protein consumer awareness & perception:

Awareness: **61%**

Consumption: **27%**

Source: ADM Outside Voice™ Plant Protein Consumer Discovery, August 2020



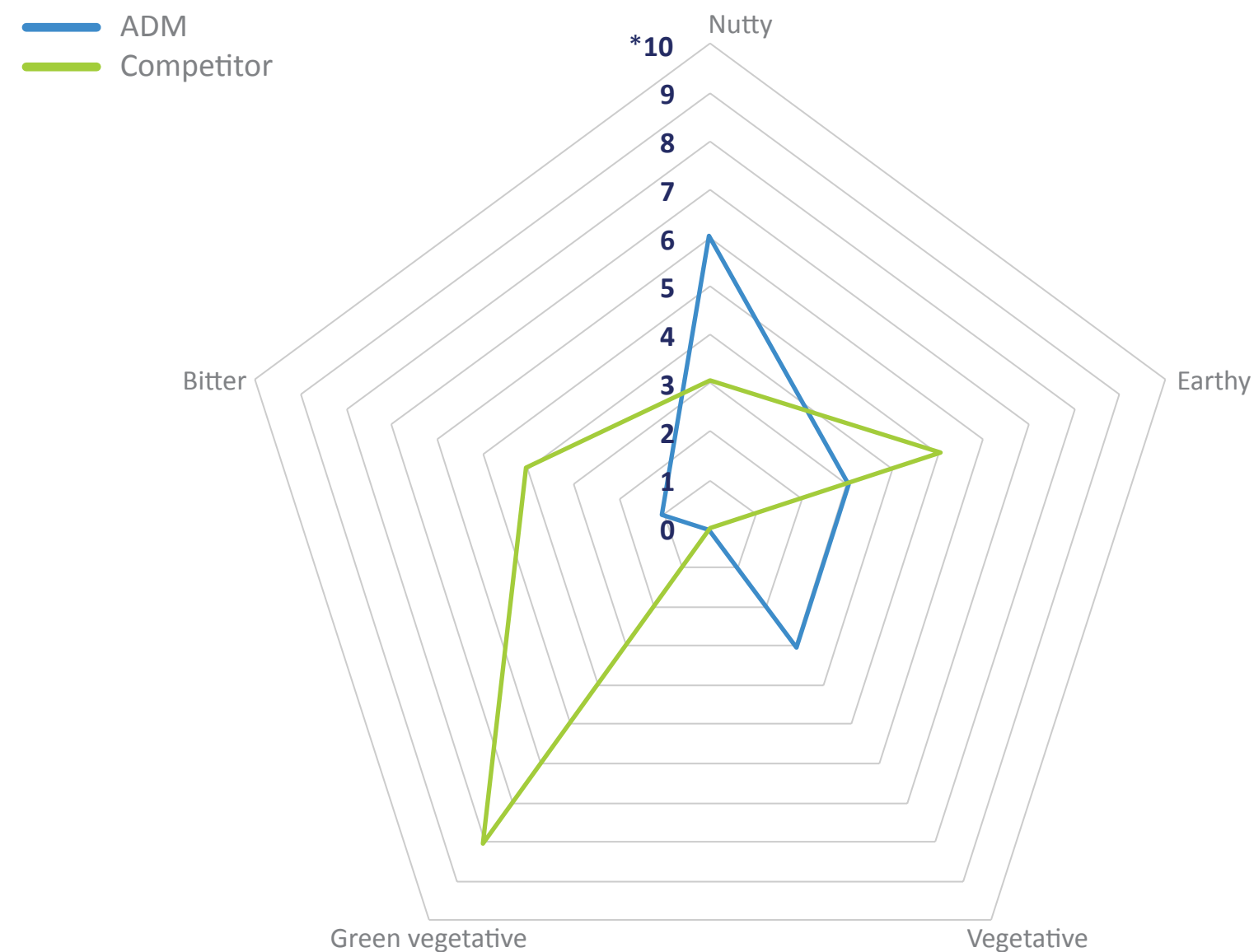
Why ADM?

- + Superior taste attributes
- + Only seed to ingredient vertically integrated supplier in industry
- + USDA #1 Grade A Beans
- + Neutral color & taste and clean label processing



Black Bean

Black beans are well known and used as a culinary staple in dishes across the globe. 59% of consumers across global markets are aware of black bean's protein power, and 35% consume them regularly. ADM's NutriStem™ black bean powder offers positive nutritional attributes and superior taste and functionality in finished products. Additionally, ADM's black bean powder scored higher in desirable traits (nutty) and lower in non-desirable traits (bitter) compared to competitors' products.



Source: ADM Inside Voice™ Sensory Panel, January 2021

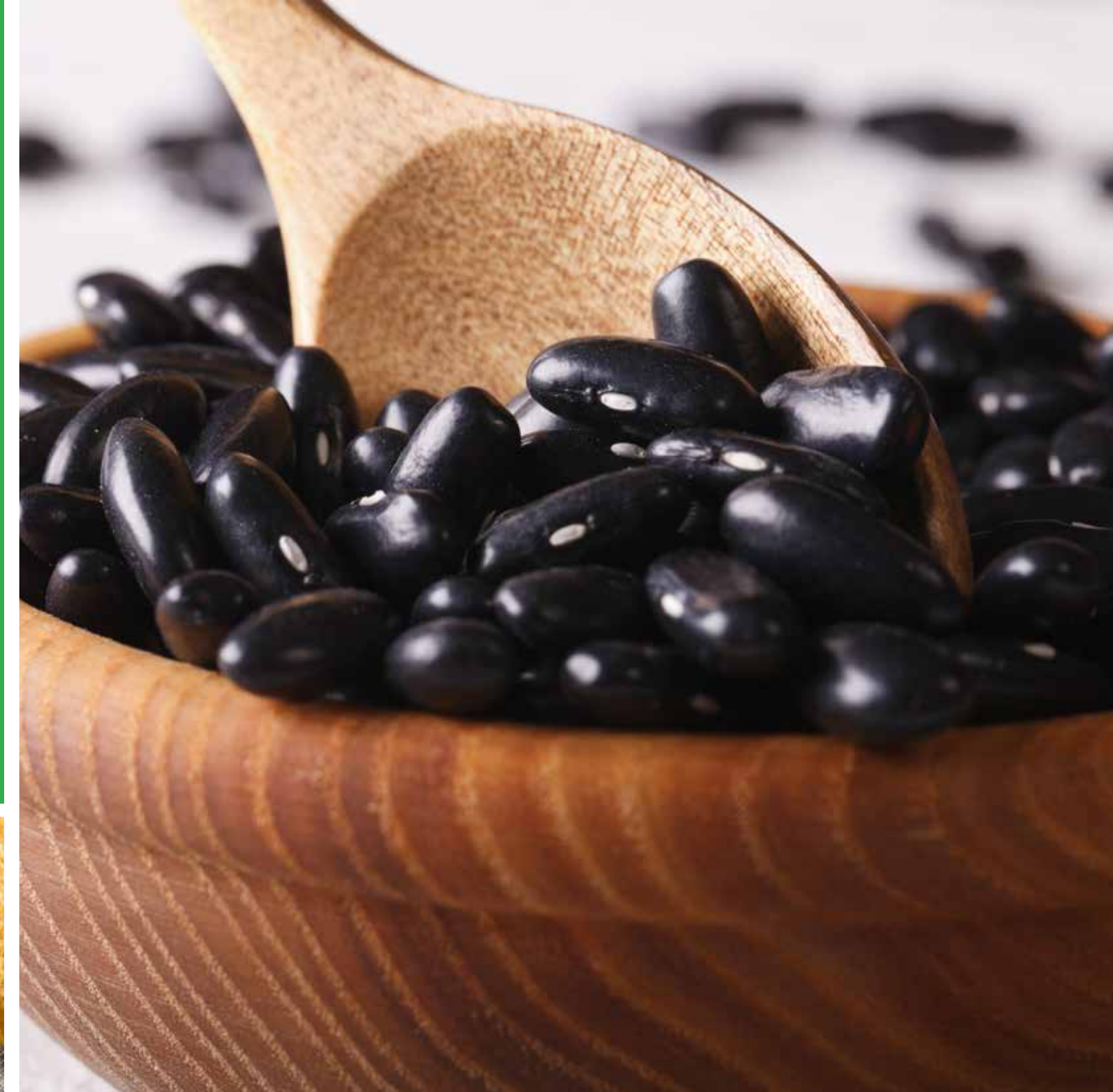
*Based on a 15-pt. scale

Global plant protein consumer awareness & perception:

Awareness: **59%**

Consumption: **35%**

Source: ADM Outside Voice™ Plant Protein Consumer Discovery, August 2020



Why ADM?

- + Clean label processing
- + Only supplier in the industry with seed to ingredient vertical integration
- + USDA #1 Grade A Beans

Navy Bean

There is a large amount of growth potential to build consumer awareness for navy beans as an up-and-coming nutritional ingredient. ADM's NutriStem™ navy bean portfolio starts with high quality inputs — USDA #1 grade A beans that provide clean, superior taste with a wide range of functionality in final applications.

Global plant protein consumer awareness & perception:

Awareness: **31%**

Consumption: **16%**

Source: ADM Outside Voice™ Plant Protein Consumer Discovery, August 2020



Why ADM?

- + Clean label processing
- + Neutral color and taste
- + USDA #1 Grade A Beans
- + Only supplier in the industry with seed to ingredient vertical integration

Quinoa

For over a century, people have taken great nourishment from quinoa across the mountains of Bolivia and Peru. As an early champion of this robust protein solution, ADM has grown to be one of the largest suppliers of quinoa across the globe. From snacks and bars, to bakery, cereals, and meal solutions, ADM's NutriStem™ quinoa continues to gain popularity across a variety of applications. Available in conventional and organic solutions, gain access to the world's best protein powerhouse along with the extensive portfolio and trusted supply chain you need for success.

Global plant protein consumer awareness & perception:

Awareness: **52%**

Consumption: **23%**

Source: ADM Outside Voice™ Plant Protein Consumer Discovery, August 2020



Why ADM?

- + Fair trade certified options
- + Ready-to-eat turnkey options

Sunflower Seed

Sunflower seeds have the lowest gap between consumer awareness and consumption of all eight identified ingredients. ADM's logistical advantage of having an office located within one of the major U.S. sunflower-growing states has ensured long-standing relationships with local farmers and a supply chain that is trusted, safe, and reliable for our NutriStem™ sunflower seeds.

Global plant protein consumer awareness & perception:

Awareness: **57%**

Consumption: **37%**

Source: ADM Outside Voice™ Plant Protein Consumer Discovery, August 2020



Why ADM?

- + Organic and multiple grade kernal formats
- + Variety of packaging sizes available

Pumpkin Seed

Pumpkin seeds are tied with quinoa with an awareness level over 50%, proving this seed has familiarity and appeal with consumers. There's a great opportunity to activate its popularity with ADM's strategic regional supply chain partnerships that guarantee reliable and value-added formats, with sustainable practices and turnkey solutions to leverage today. ADM NutriStem™ pumpkin seeds are used for a variety of applications, including organic and ready-to-eat options.

Global plant protein consumer awareness & perception:

Awareness: **52%**

Consumption: **23%**

Source: ADM Outside Voice™ Plant Protein Consumer Discovery, August 2020



Why ADM?

- + Organic and ready-to-eat options
- + Variety of packaging sizes available for turnkey solutions

Chia Seed

ADM NutriStem™ Chia Seeds are increasingly used across a wide range of beverages, baked goods, snacks, desserts, and specialized nutrition products. Consumers praise chia seeds for their combination of fiber, omega-3 fatty acids, and essential minerals. ADM's strategic regional supply chain partnerships guarantee reliable, value-added formats.

Global plant protein consumer awareness & perception:

Awareness: **45%**

Consumption: **19%**

Source: ADM Outside Voice™ Plant Protein Consumer Discovery, August 2020



Why ADM?

+ Organic and ready-to-eat options

Hemp Seed

Hemp seeds carry a reputation for a newer, health-forward source of plant protein in bakery, snacks, and specialized nutrition products. Strong opportunities exist to better familiarize consumers with this seed in a range of products that boast a blend of familiar and emerging plant-based ingredients.

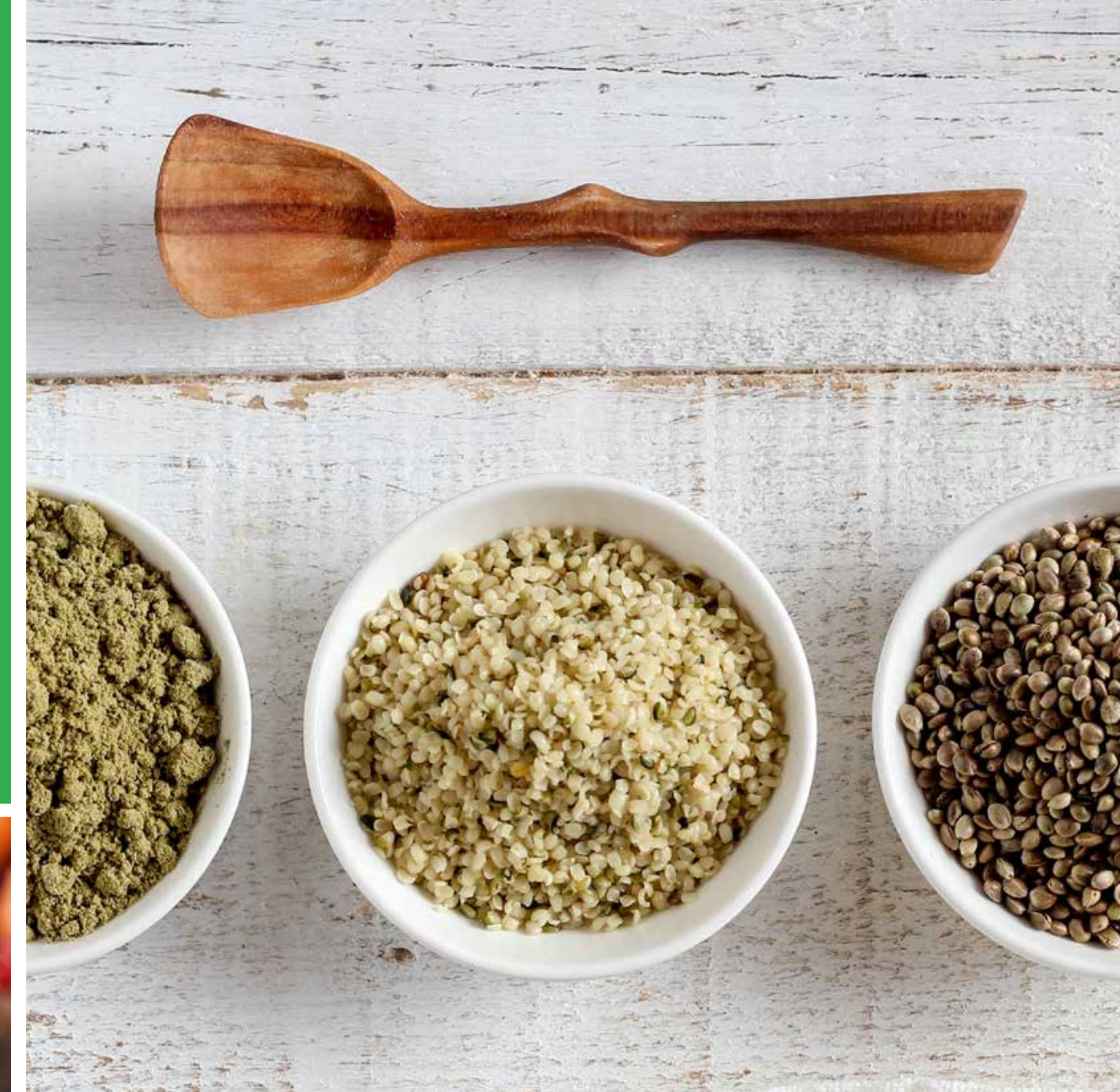
ADM NutriStem™ hemp seeds are available in various formats, from seed to protein powders, providing ample ways to bring this on-trend ingredient to your next protein-forward innovation.

Global plant protein consumer awareness & perception:

Awareness: **27%**

Consumption: **5%**

Source: ADM Outside Voice™ Plant Protein Consumer Discovery, August 2020



Why ADM?

- + Organic and ready-to-eat options
- + Variety of formats



Why ADM: Wholesome Ingredients matter.

At ADM, our mission is to unlock the power of nature to solve global nutritional challenges, enrich the quality of life and satisfy growing consumer desire for food that delivers both nutrition and taste.

ADM is on the forefront of innovation, from having the broadest on-trend portfolio of wholesome ingredients from a single supplier to food and beverage solutions that boast a more neutral-tasting, clean profile.

Solve the plant nutrition challenges of today and tomorrow with our global team of culinary, taste and texture experts. Come see what a difference cross-functional team expertise, a full pantry of ingredients, and global supply chain reliability can do.

Your edge. Our expertise.



Let's Collaborate.

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