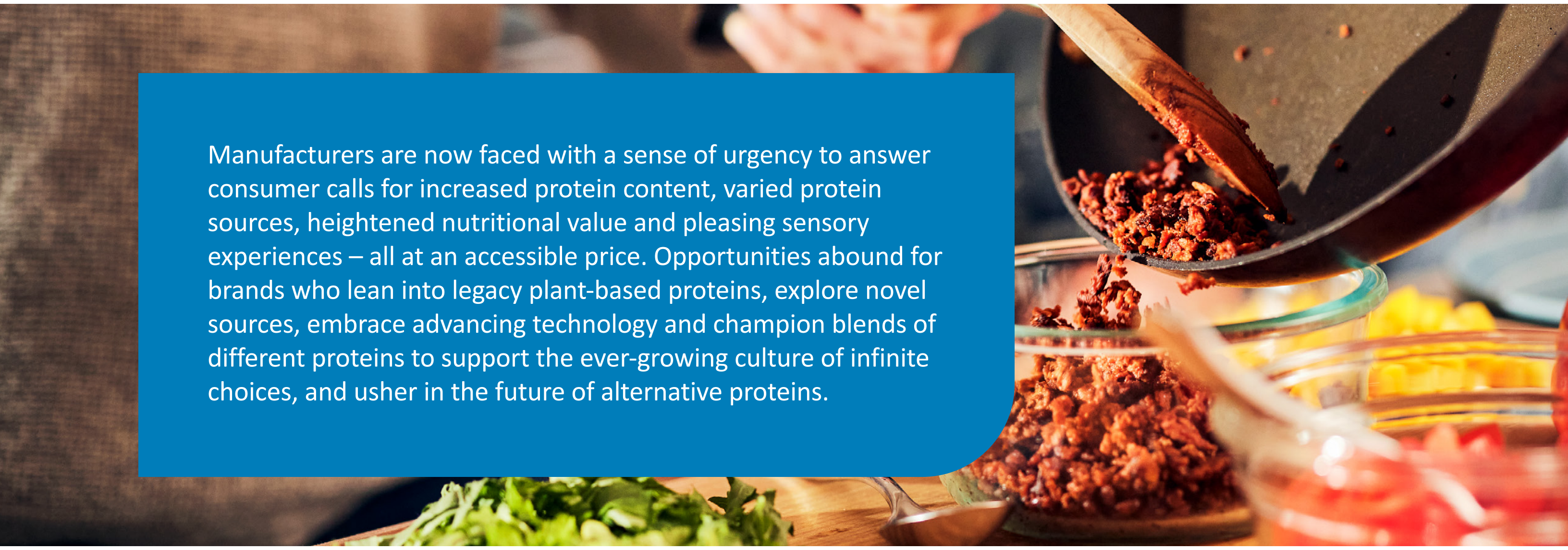
Alternative Protein Landscape Report

July 2025

## Consumers Are Calling for More: More Protein, More Formats, More Flavor

# The Powerful Trends That Are Shaping Alternative Protein Innovation

Protein as a macronutrient has never been hotter. Driven by health and nutrition goals, there is surging demand for greater daily protein intake, spurring the desire for expanded high-protein formats with an emphasis on wholesome ingredients. Relatedly, the popularity of plant-derived protein is growing due to perceived health benefits. What's more, consumers don't have to drastically change their dietary habits to reap those considered benefits. Thanks to ingredient and technology advancements, hybrids or blended proteins offer a way for consumers to mix in more protein sources. Gen Z and millennial consumers are particularly open to protein variety; and with Gen Z's purchasing power just beginning to emerge, we anticipate amplified acceptance and adoption of a wider array of protein offerings.



Manufacturers are now faced with a sense of urgency to answer consumer calls for increased protein content, varied protein sources, heightened nutritional value and pleasing sensory experiences – all at an accessible price. Opportunities abound for brands who lean into legacy plant-based proteins, explore novel sources, embrace advancing technology and champion blends of different proteins to support the ever-growing culture of infinite choices, and usher in the future of alternative proteins.

# The consumer cohorts in the alternative protein arena[1]

## Flexitarians:

Consumers who are actively trying to eat more plant-based products or trying to eat less animal protein; however, they still eat animal-based meat and dairy as well.

- **Globally, 46% of consumers identify as flexitarians, led by Germany, South Korea and a tie between the US and Brazil.**
- Health continues to be the primary motivation for choosing a flexitarian lifestyle, with 86% of global plant-forward consumers believing it is healthier to get protein from a wider variety of sources.

## Vegetarians and Vegans:

Vegetarians are consumers who do not eat meat but may still eat some animal products, such as eggs and cheese. Vegans are consumers who do not eat any meat, nor do they consume any other types of animal products.

- **Across regions, roughly 4% of consumers identify as vegetarians and 1% identify as vegans.**

## Carefree:

Consumers who eat both plant-based and animal-based foods and beverages and do not intentionally seek out or avoid either one. Compared to plant-forward consumers, these consumers skew slightly older and retired, aligning with the baby boomer generation.

- **As the largest consumer group across global populations, at 49%, carefree consumers present unique innovation opportunities with blended protein.**
- 41% of carefree consumers say they don't follow any specific dietary restrictions, so they eat both types of protein.
- At the same time, 67% of carefree consumers say eating more plant proteins will help improve their overall health, and 73% say it's healthier to get protein from a wide variety of sources beyond just animal-based products.

### Soy Resonates with Millennial and Gen Z Consumers[1]

**Soy consumers are more likely to be younger (under the age of 45), urban, follow a plant-based diet and be aware of and consume a wider variety of plant-based protein types.**

# Legacy & Novel Protein Sources Lead The Way

From familiar to new protein sources and advanced technologies, product developers have multiple avenues to meet consumers where they are now while being at the forefront of what's next in alternative protein innovation.

As one of the top five most recognizable plant protein sources globally, soy is a stand-out legacy ingredient with staying power. Soy supports increased protein intake, especially among people with active lifestyles and those on weight management journeys, which are now a part of consumers' everyday discussions and wellness goals. Plant-forward consumers most associate soy with being healthy/nutritious, tasty and safe[1]. Moreover, **83% of plant-forward consumers agree that soy protein is a good source of plant-based protein for building/maintaining muscle, 81% believe it's a great option for reducing fat intake, and 79% associate it with a healthy/active lifestyle[1].**

Even more recognizable than soy? **Chickpea. It ranks in the top three for global plant-forward consumer awareness[1].** Because it is most commonly consumed as an ingredient in a dish, there is substantial opportunity for it to be incorporated into more convenient formats like ready meals and snacks, as well as in foodservice offerings. The same is true with other wholesome ingredients like grains, seeds and beans. All can be used to elevate products and deliver in-demand nutrition.

Emerging now as the "new kid on the block" are lentils. While lentils have an awareness-to-consumption gap (20%), they're thought of as extremely healthy and nutritious, along with being tasty, clean and natural[1]. Thus, **lentils align with flexitarians' top motivators: health and their need to "have it all," with taste and nutrition paramount in product formulation.** Lentils are most likely to be eaten as an ingredient within a dish or product, so they, too, lend themselves nicely to convenient ready meals and snacking occasions, and they could be listed as a featured ingredient on product packaging due to their positive associations.

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## The Future May Be Fermentation

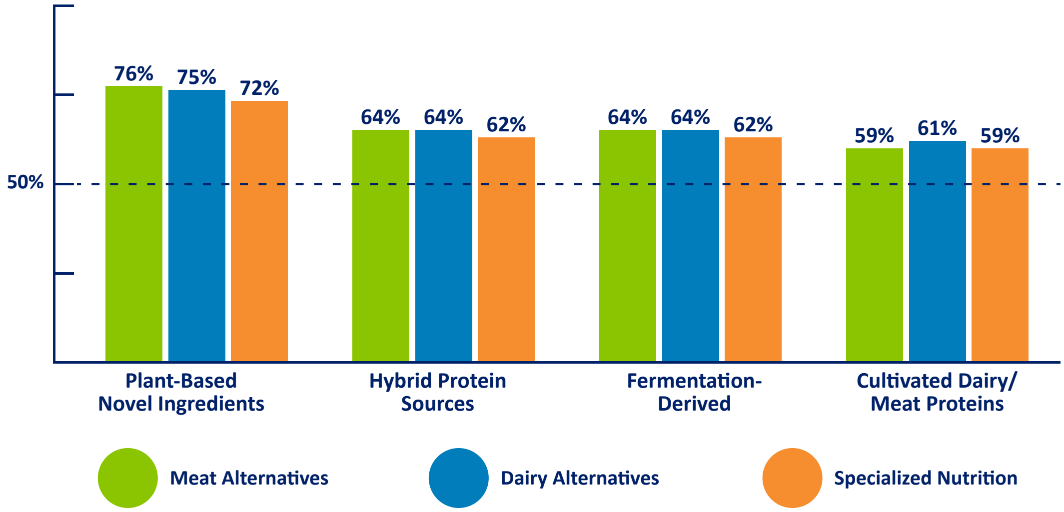
Fermentation-derived proteins are proving to be the imminent "what's next" technology, with newfound consumer interest and acceptance for use in meat/seafood alts, dairy alts and specialized nutrition formulations. **When exposed to next-gen alternatives, plant-forward consumers are most interested in trying plant-based products with novel ingredients across categories, followed now equally by hybrid/blended sources and fermentation-derived ones[1].**

With more consumers open to this source than ever before, we anticipate even greater innovation opportunities in fermentation. However, legacy proteins and hybrids/blends will remain crucial to bridging the gap between these various protein sources, as their familiarity will continue to build acceptance of newer formats.

### The Cohorts Get Cultured[2]

**Millennials are most interested in trying foods and beverages with fermentation-derived proteins at 72%, with Gen Z consumers close behind at 68%.**

## Interest Percentage by Protein Source and Product Category[1]




- Among next-gen protein sources, plant-based novel ingredients garner the most interest among consumers
- Consumers find dairy alternatives most intriguing among cultivated proteins

Plant-forward consumers say they'd buy and pay more for plant-based products if they are **locally sourced, organic and have low sodium and sugar,** aligning with ongoing health trends[1].

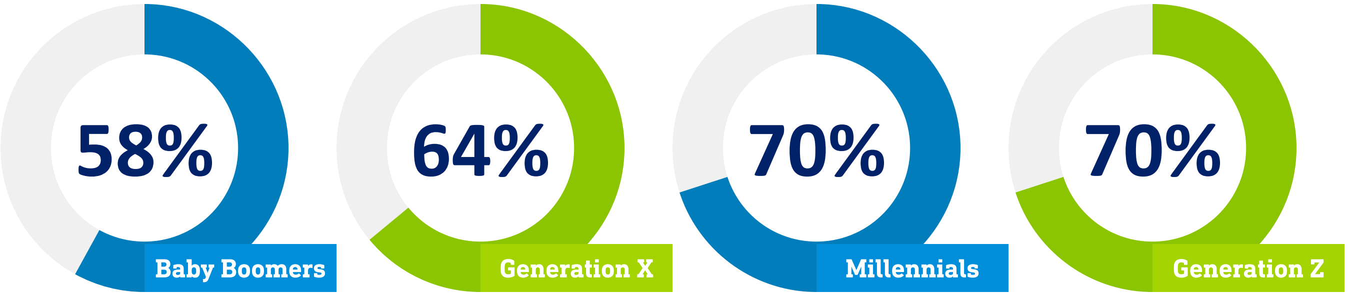
# Every Generation Wants More Protein In Every Meal

The protein boom shows no signs of stopping. Some shoppers are even looking to reach 30 grams or more of protein with each meal. Supporting an active lifestyle into as late in life as possible is a key driver that has heightened the focus on protein. **Nearly 80% of consumers believe eating more plant-based proteins will "help me age better," and 78% believe they will help build or maintain muscle mass/strength[1].**

This pursuit for more protein applies to all generations and consumer groups – including carefree consumers. **Globally, 20% of carefree consumers state that "as long as the product provides protein, they don't care where it's from[1]."** This is promising for new product development boasting of high protein, whether it's fully plant-based or a blend of protein sources. As such, there is whitespace for expanded (and convenient) formats that better help people incorporate more protein into their diets, with demand for innovation with soy, peas, chickpeas, lentils and wholesome ingredients.

## Percentages by Generation[2]

**Look to increase intake of protein content in their diet**



**Along with the desire for more protein, improved taste and texture are increasingly motivating factors for plant-forward consumers, particularly in baked goods, ready meals, meal kits and sports nutrition products[1].** Taste and the sensory experience always remain critical for consumer trial and adoption across alternative protein products. However, it's that much more important for carefree consumers, who put taste over nutrition when it comes to plant-based products. **For global plant-forward consumers, taste and nutrition are equally important (63%)**, followed by just nutrition (21%) and taste (16%).

This bodes well for new plant-based protein innovation as formulators have been hard at work for years now incorporating consumer feedback like this. The result has been tastier offerings that have helped fuel the increased enthusiasm for plant-based proteins that we are already seeing on the market.

In future innovations, **consumers also want to see more food safety certifications, along with enhanced functional health benefits and sourcing transparency[1].**

## GLP-1 Impact

The rapid growth in anti-obesity medications (AOMs), such as GLP-1 receptor agonists, is also positively influencing the adoption of plant-based foods. Indeed, **77% of global plant-forward consumers believe plant-based proteins make it easier to lose weight[1].** Additional research shows that, in the US, 64% of consumers engaging with AOMs state they pay more attention to a product's protein content, and 44% are intentionally increasing their intake of plant-based proteins[3]. Another prominent macronutrient is fiber, with 49% GLP-1 users looking to increase their fiber intake[3].

**New and reimagined plant-based foods and beverages that target portion control and deliver high protein and dietary fiber stand to succeed,** offering plant-forward product manufacturers an opportunity to evolve their positioning for a wider population and address trending consumer needs. Markedly, **"manage/lose weight" is among the top motivators globally (regardless of AOM usage) for trying plant-based snacks, sports nutrition and ready meals/meal kits[1].**

## Formats Piquing Interest

**(plant-forward consumers are interested in trying but have not yet tried)[1]**

### Meat and Seafood Alternatives

1. Tacos/burritos/empanadas
2. Shredded/pulled meat
3. Drumsticks/wings

### Dairy Alternatives

1. Sour cream
2. Whipped cream
3. Pudding

**Consumers cite the following benefits as key motivators for trying blended proteins:[4]**

- "Healthier"
- "Better for the environment"
- "Adding variety to diets"
- "Better dietary balance of plant and animal proteins"
- "More nutritious"

# Blends Offer the Best of Both Worlds

Advances in ingredient quality, formulation expertise and next-generation technologies have brought forth a new era for novel innovation around hybrids or blends. This movement celebrates the intermingling of plant plus other protein sources, whether they be animal-derived, wholesome ingredients or the result of a novel technology like fermentation.

**Bringing together multiple protein sources, often with the inclusion of legacy proteins, unlocks benefits for consumers without them having to significantly change their diet.** Flexitarians stay flexitarians and carefree eaters can stay carefree eaters while getting more nutrients in a format they'll find more familiar.

Protein blends meet every rising consumer demand – protein and ingredient diversity, higher protein content, elevated taste and texture, sustainability concerns and affordability. And they do so better than the current selections in the marketplace, namely, traditional meat or dairy or all-plant products.

## Percentages by Generation[2]

| Interest in trying blended or hybrid products | | Actively seek varied protein sources for nutritional balance |
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## Meat Extensions Make Sense

Many consumers are looking for a "new value equation" as they become more purposeful with their spending. In certain markets, shifting to meat products that have been "extended" with plant proteins can increase their volume, providing an avenue to support cost-conscious shoppers with value-centric products.

Consumption and awareness of meat extensions are led by consumers in Brazil, with 35% of plant-forward consumers stating they have tried meat extension products[1]. **While one in four global plant-forward consumers have never heard of meat extensions and only 16% claim to currently consume them[1], the perception of meat extensions is much more positive than expected.**


### Private Labels Are Priced Right[1]

**Globally, 78% of plant-forward consumers say private label plant-based foods and beverages are just as good as branded. This sentiment is even higher for consumers in Brazil and Australia.**

## Protein Advancements Today to Support Innovation Tomorrow

**Partnering with a global supplier like ADM helps brands capitalize on consumer needs, demands and interests today by differentiating their products on store shelves. With a vast library of plant-based ingredients and systems, flavor modulation technology, functional solutions and more, ADM's ingredients, capabilities, and protein-, culinary- and formulation expertise all support manufacturers in accelerating protein innovation now to bring the future of food to consumers around the world.**

### References

[1]*ADM Outside Voice℠, Global Protein Consumer Discovery Report, 2025*
[2]*ADM Outside Voice℠, Global Lifestyle Survey, 2025*
[3]*ADM Outside Voice℠, Anti-Obesity Medications Survey, 2024*
[4]*ADM Outside Voice℠, The Future of Blends, Global Consumer Insights Report, 2024*

***NOTE:*** *ADM research defines plant-forward consumers as flexitarians, vegetarians and vegans. Carefree consumers are a separate cohort that don't define themselves as following a flexitarian, vegetarian or vegan lifestyle.*