

Protein Systems: Plant-forward protein solutions

Three levels of solutions and services to meet consumer demands.



The market opportunity.

The popularity of plant protein is continuing to gain global momentum and shows no signs of slowing down. As plant-based eating has gone mainstream, more consumers are looking for environmentally friendly, plant-based solutions that reinforce their health-focused lifestyle goals, while still delivering a culinary-forward taste profile and a variety of accessible formats.

\$307B

Expected value of the global alternative market* by 2030¹.

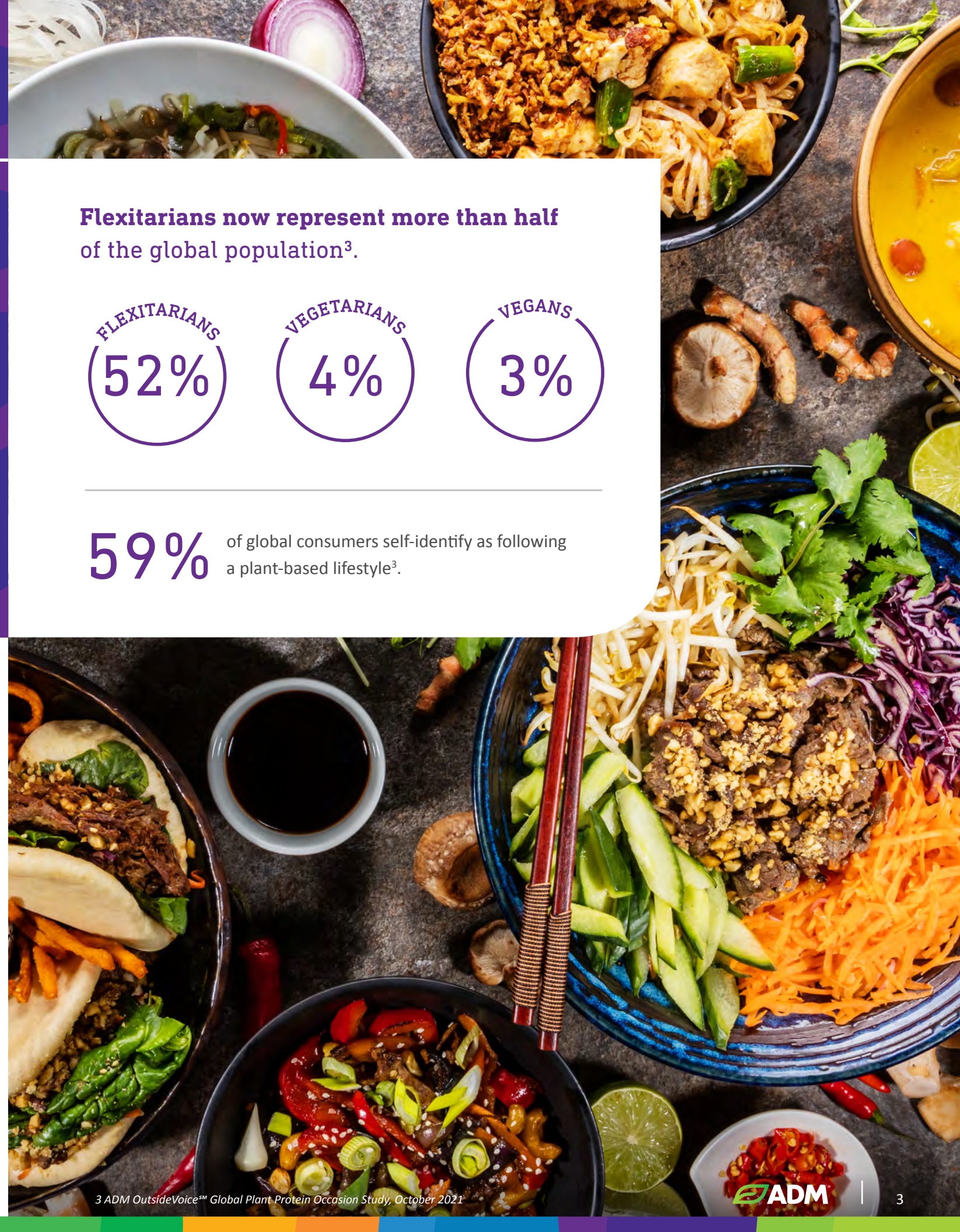
10%

The expected compound annual growth rate (CAGR) for top alternative protein categories* from 2021 to 2030¹.

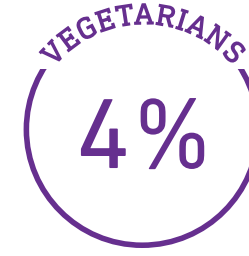
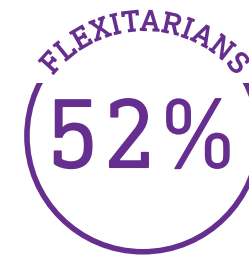


A big market opportunity is knocking for your brand.

COVID-19 has had a profound effect on the plant-based market, increasing appeal. **50% of experienced global plant protein users increased their consumption of alternative proteins** during the pandemic, mainly because of greater health consciousness².



Flexitarians now represent more than half of the global population³.



59% of global consumers self-identify as following a plant-based lifestyle³.

* Among top alternative categories: meat alternatives, dairy alternatives, sports nutrition, snacking, ready meals.

¹ ADM InsideVoice™, January 2022

² Blue Horizon and BCG Customer Survey, February - April 2022, n=3,729, BCG Analysis 2022

³ ADM OutsideVoice™ Global Plant Protein Occasion Study, October 2021

Global consumer motivations to alternative products.

Health reigns supreme.

In looking for plant-based solutions that reinforce their nutrition and health-focused lifestyle goals, **global consumers see perceived health benefits* as the top motivation for consuming meat and dairy alternatives**—with animal welfare concerns and nutritional benefits closely following⁵.

Top Motivations for Meat Alternatives

	Health Benefits	Nutritional Benefits	Environmental Concerns	Animal Welfare Concerns
	65%	59%	64%	54%
	61%	64%	49%	60%
	58%	72%	56%	64%
	74%	73%	74%	68%
	57%	49%	53%	49%
Global Total	63%	63%	59%	59%

Top Motivations for Dairy Alternatives

	Health Benefits	Nutritional Benefits	Environmental Concerns	Animal Welfare Concerns
	62%	55%	44%	40%
	59%	47%	45%	44%
	49%	46%	45%	49%
	64%	55%	57%	46%
	57%	57%	48%	36%
Global Total	58%	52%	48%	43%



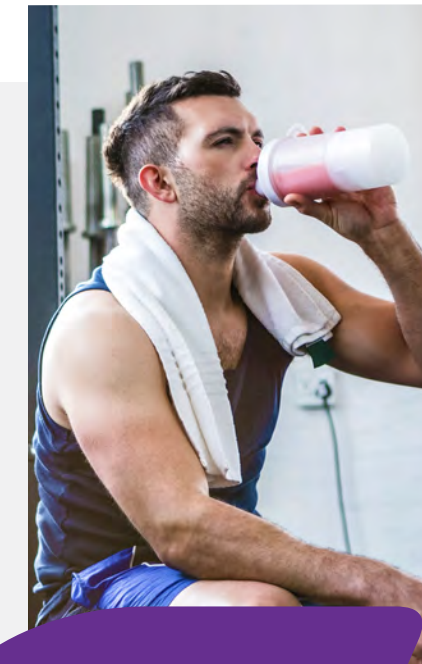
Today's modern protein consumer.

ADM Systems paves the way for mindful, modern protein.

As consumers become increasingly savvy about proteins they desire in food and beverage experiences; they yearn for new plant-based offerings that meet their health and wellness motivations.

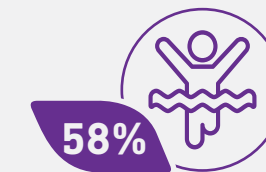


59% of global consumers say they would like more protein in their diet.⁴



ADM's Protein Systems platform was designed with today's wellness-focused consumer in mind.

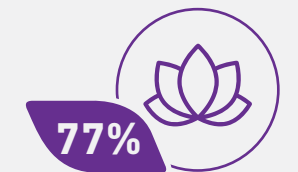
Consumers associate protein with healthy living and healthy aging. A larger percentage of consumers connect protein to these top benefits⁴:



Helps me stay active as I age



Helps support the immune system



General health and wellness

Through the delivery of consumer-preferred next-generation plant-based products, along with accelerated speed-to-market capabilities, an unmatched pantry of solutions and a legacy of world-class technical expertise, now you can serve up solutions for this growing demand.

Discover ADM's ever expanding Protein Systems platform with three levels of integrated solutions and services to meet any need.

4 *As a result of our OutsideVoiceSM primary research
5 ADM OutsideVoiceSM Global Protein Consumer Discovery Study, August 2020

Level 2: AccelFlex™

At a glance.

What is AccelFlex™?

- + Value-added protein ingredients to address your texture, structure and function challenges.

Gain an edge.

- + Leverage AccelFlex™ functional or texture systems to deliver the bite and chew consumers expect and accelerate production of on-trend plant-forward products that meet your nutrition needs.

Available offerings.

AccelFlex™ Texture Systems:

- + AccelFlex™ TS ST60-E Soy Crisps
- + AccelFlex™ TS ST60 Non-GMO IP Soy Crisps
- + AccelFlex™ TS ST80 Non-GMO IP Soy Crisps
- + AccelFlex™ TS Fibrous Soy S68
- + AccelFlex™ TS PC70 Textured Pea Protein (pea and chickpea)
- + AccelFlex™ TS PN65 Textured Pea Protein (pea and navy bean)

AccelFlex™ Functional Systems:

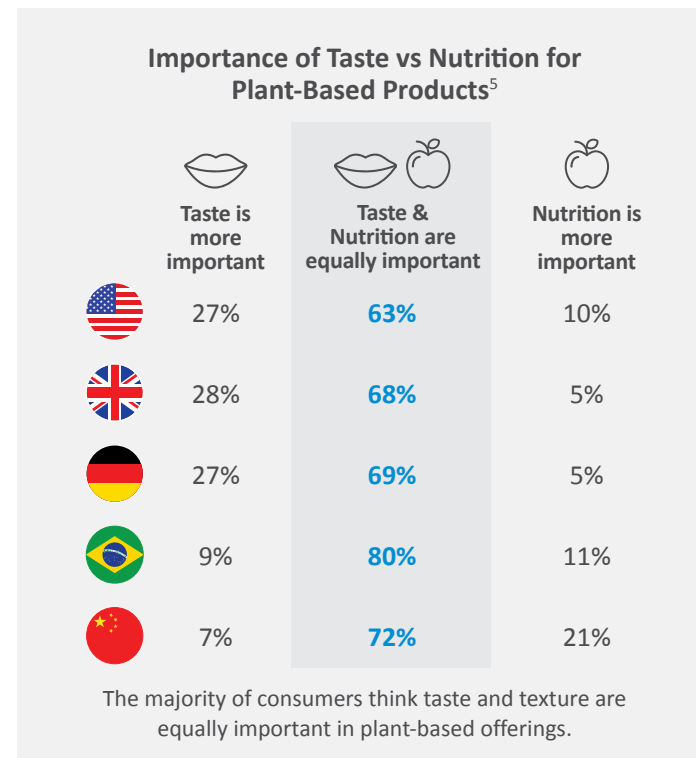
- + AccelFlex™ Soy-Based Binder System
- + AccelFlex™ Pea-Based Binder System

Delivering Maximum Nutritional Value

The demand for plant-forward specialized nutrition products is on the rise. Today 59% of global specialized nutrition* occasions feature plant-based proteins. With 27% of today's global specialized nutrition occasions dominated by nutritional bars, consumers are looking for better-for-you in-between meals and snacking opportunities. They strive for high protein and other functional benefits that make them feel energized, healthy, and balanced.⁴

Consumer insights

Today's Flexitarian consumers seek products with maximum nutritional value and digestive benefits. Growing interest in both the human microbiome and plant-based ingredients reflect this holistic movement. The result is an opportunity to highlight on-trend concepts that keep taste and nutrition top of mind for those who are unwilling to compromise.



Global Flexitarian consumer motivations for specialized nutrition occasions:⁴

Rational	Emotional	Technical
#1 Motivator: Feel healthy/nutritious	#1 Motivator: Feel balanced	#1 Motivator: High in protein
#2 Motivator: Is delicious	#2 Motivator: Feel energized/re-charged	#2 Motivator: Is natural

APPLICATION CONCEPT: Blueberry Apple Protein Crisp Bar

DESCRIPTION

We've loaded a whopping 7 grams of complete plant protein into this fruit-filled bar that has only 4 grams of added sugar. Indulge your senses with the sweet taste of blueberry and apple, and a crunch that makes it truly memorable. Here is a different kind of quality-protein bar, one that fills your mouth with a sweet fruit explosion along with a satisfying multisensorial pop of the AccelFlex™ soy crisp that will have people reaching for it again and again.

CONCEPT HIGHLIGHTS

- + 7g Plant-based protein per 40g serving
- + 18 CFUs DE111® & 1-B Cells HT BPL1™
- + 5g Fiber per 40g serving
- + 4g Added sugar per 40g serving
- + Non-GMO Ingredients

ADM INGREDIENTS

- + AccelFlex™ TS ST80 Non-GMO IP Soy Crisps
- + ProFam® 936 Soy Protein Isolate
- + NutriStem™ Quinoa Crisps
- + Heat-treated BPL1™ (*Bifidobacterium animalis* subsp. *lactis* CECT8145)
- + *Bacillus subtilis* DE111®
- + Fibersol®
- + Other ADM specialty ingredients, sweeteners and flavors

ALLERGENS

- + Soy
- + Dairy
- + Coconut



Nutrition Facts	
servings per container	
Serving size	(40g)
Amount Per Serving	
Calories	150
	<small>% Daily Value*</small>
Total Fat 5g	6%
Saturated Fat 3.5g	18%
Trans Fat 0g	
Cholesterol 0mg	0%
Sodium 115mg	5%
Total Carbohydrate 22g	8%
Dietary Fiber 5g	18%
Total Sugars 8g	
Includes 4g Added Sugars	8%
Protein 7g	
Vitamin D 0mcg	0%
Calcium 13mg	2%
Iron 1mg	6%
Potassium 36mg	0%

*The % Daily Value tells you how much a nutrient in a serving of food contributes to a daily diet. 2,000 calories a day is used for general nutrition advice.

CHALLENGE

Creating an on-trend, balanced bar that provides multisensorial texture, targeted nutrition, quality protein and dietary fiber to meet consumers' pursuit for healthy living lifestyle practices.

CHALLENGE SOLVED

Rising to meet this challenge, our experts handcrafted excellence—an indulgent, high-protein bar with a desirable puffed and poppable texture. The nutritional punch comes from the non-GMO AccelFlex™ TS 80% Soy Protein Crisps, which boast a PDCAAS score of 1, qualifying them as a complete protein source from plants! This permissibly indulgent bar doesn't contain the dryness or off-notes often found in other high protein offerings and also supports overall health and immune function through formulation with pre-, pro- and postbiotics.

Our expansive, market-leading ingredients pantry, combined with our technical prowess, enables us to deliver new food possibilities. By partnering with us, you can leverage our plant-based expertise in taste, texture, nutrition, function and even color to bring innovation to life and set new standards. Our expertise helps create on-trend, plant-based bars, clusters and cereals with the taste and texture modern consumers demand.

⁴ ADM OutsideVoice™ Global Plant Protein Occasion Study, October 2021
⁵ ADM OutsideVoice™ Global Protein Consumer Discovery Study, August 2020

* Sports Nutrition and Meal Replacement Products (bars, powders, and/or ready-to-drink shakes)



Why ADM Protein Systems.

Get an edge with true plant protein perfection, thanks to Protein Systems.

ADM is a full solutions partner, who understands your formulation challenges, and can help you optimize your product for market—from marketing insights and consumer validation to sensory testing. We invest in new technology and processing methods to bring you what's next in protein nutrition solutions, today. You can count on ADM to keep delivering, with quality of product and reliability of supply.



Our advantage.

Through science-backed product development, our team paves the way to create consumer-desired solutions. With the ability to leverage our vertically-integrated portfolio in conjunction with expert taste, nutrition, texture, functional benefits, and color considerations we can bring “One ADM” solutions to the next level.

Partner with our specialists to gain extensive cross-functional team expertise, global manufacturing and supply chain footprint assistance for any stage of the value chain to achieve tailored, innovative and expertly-designed plant-based products.

Let's Collaborate.

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