



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.

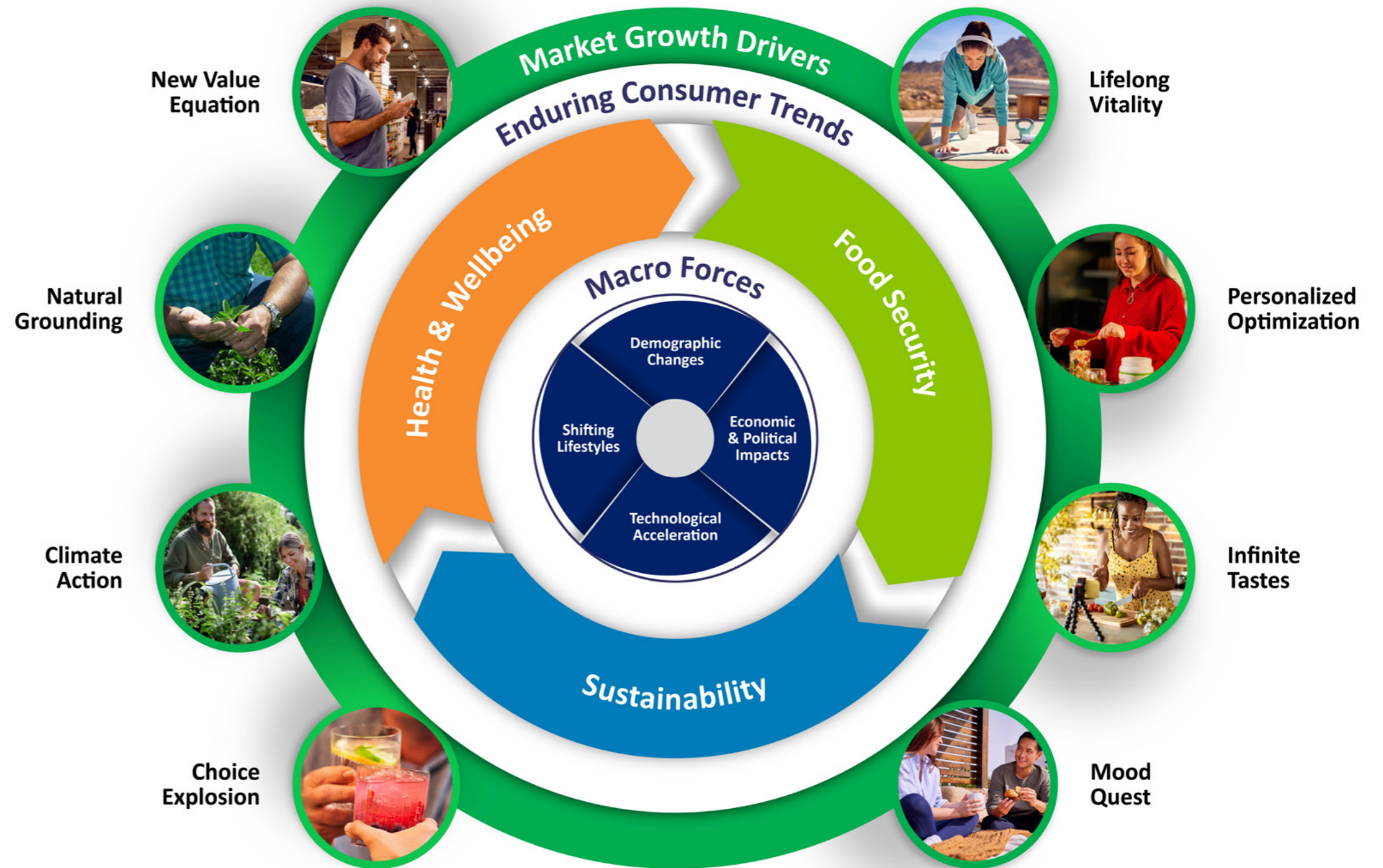
Adapting to Consumers Evolving Motivations

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)

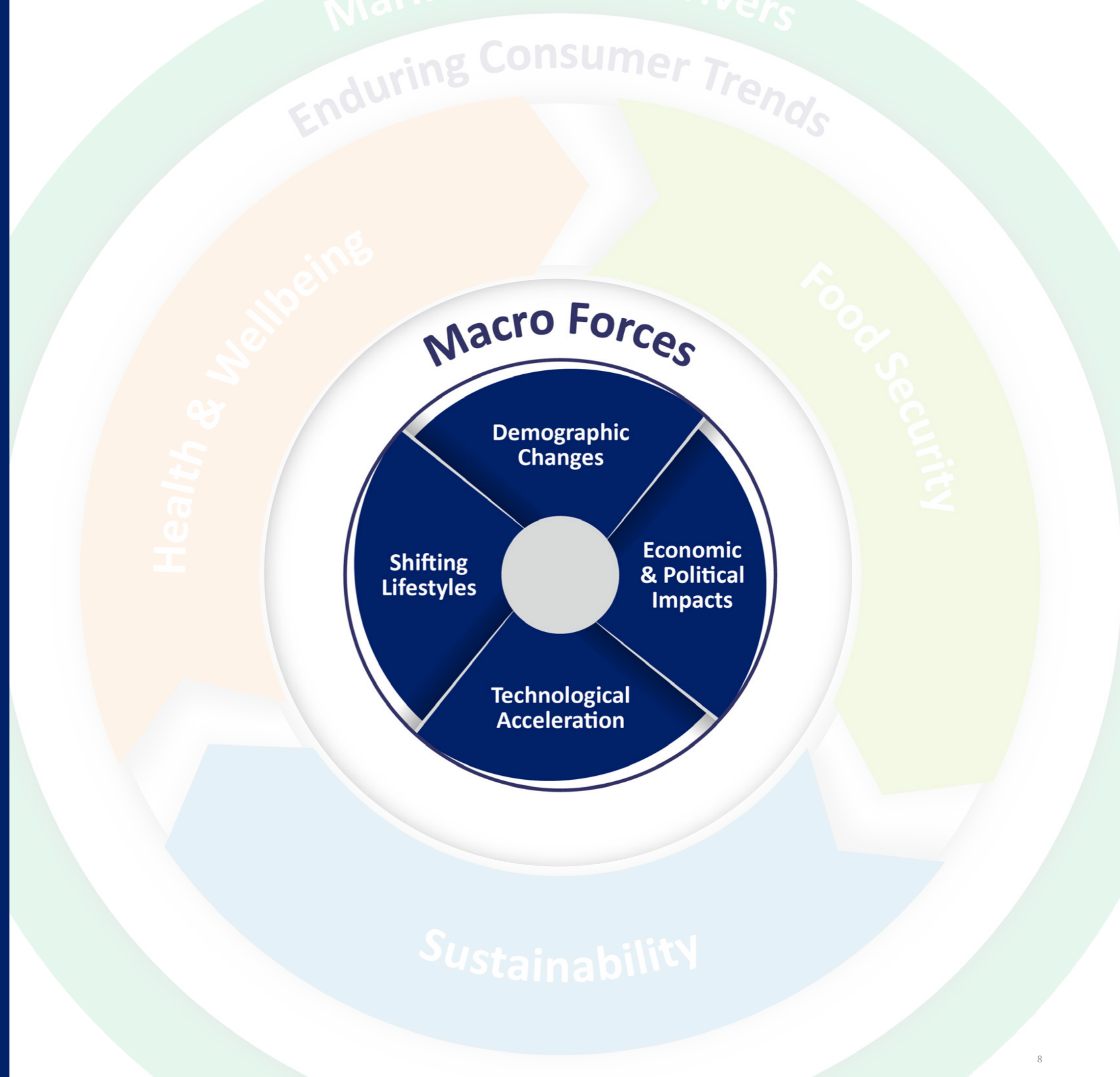
Global Trends Framework

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.





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.

- Climate-adaptive Lifestyles
- Mindful Living
- Time Shifting



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.

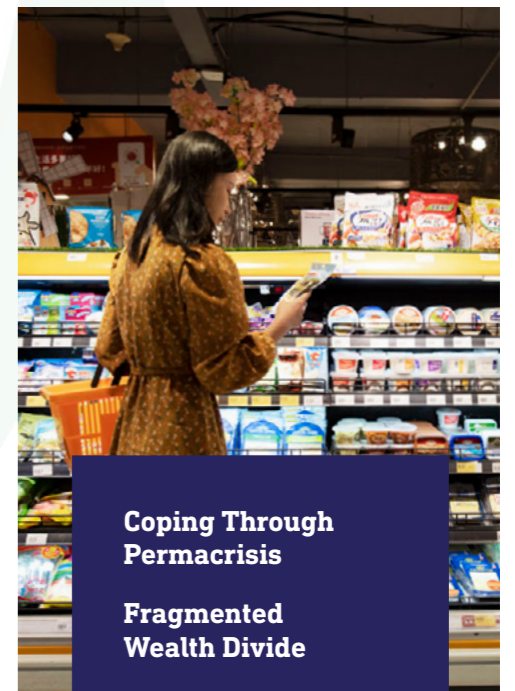
- AI-driven Development
- Workforce Revolution
- Digital Discernment



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

Market Growth Drivers
Enduring Consumer Trends

Health & Wellbeing

Food Security

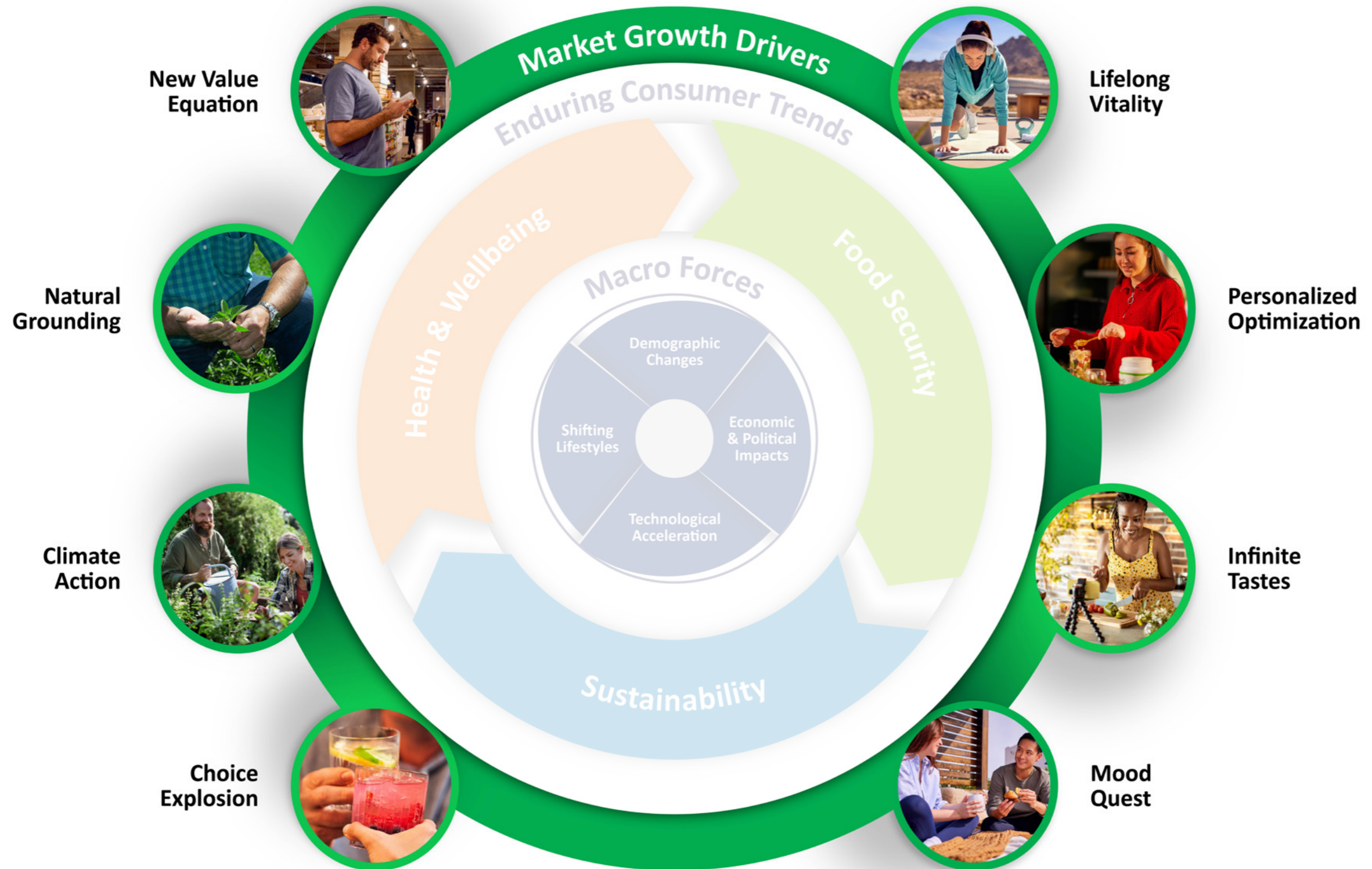
Macro Forces



Sustainability

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.

84%

of global Millennials agree that "Vitality is a good indication for personal health"¹

84%

of global pet owners are interested in products that may help increase the lifespan of their pet¹

76%

of global Millennials are interested in solutions that allow them to slow down their biological aging process¹

Expressions

Longevity as Daily Practice



Longevity is increasingly managed through daily rituals, functional ingredients, and preventive routines rather than extreme hacks. Consumer language becomes more normalized and lifestyle-led, focusing on habits, rituals, and active physical living.

Practical Wellness



Consumers choose foods and ingredients as targeted tools, with clearer benefits, smarter dosing, and science-led claims. They seek cause-and-effect messaging, evidence-driven positioning, and convenient formats.

Cognitive Resilience



Memory, focus, and cognitive health, combined with calm energy, are becoming central to long vitality. Consumers increasingly seek everyday foods and drinks that support brain function.



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.



69%

of Millennials worldwide agree that personalized food and beverage options are important to them because their needs are different from others¹

72%

of global Gen Z are open to using technology to access personalized nutrition solutions tailored to their health goals¹

39%

of APAC consumers would be willing to pay more for food and beverages that are tailored to their unique health needs¹



Expressions

Inside – Out Optimization



GROWING

As personalization matures, optimization is increasingly expressed through the gut and microbiome as foundational systems influencing whole-body outcomes. By linking digestive support to benefits such as immunity, skin health, energy, and healthy aging, brands are embedding personalization into how nutrients are processed and absorbed.

Adaptive Nutrition Platforms



GROWING

As personalization continues to evolve, optimization is increasingly defined by when and how nutrition is delivered, rather than by overt customization. The integration of protein into breakfast drinks, pancakes, and coffee formats illustrates how functional ingredients are being re-engineered to meet specific daily moments—embedding personalization directly into product design.



Closed-Loop Personalization



EMERGING

Personalization shifts from “targeting a consumer type” to adapting based on signals - biometrics, wearables, apps, or self-tracking- creating a feedback loop between what people consume and how they feel/performance. The product isn’t just “for you”; it’s designed to work with data-guided routines and measurable outcomes.

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.

80%

of Millennials in EMEA agree that trying food from different countries is a great way for them to learn about and experience other cultures¹

74%

of LATAM consumers enjoy trying food and drinks that combine flavors and colors in surprising ways¹

78%

of global Millennials, the novelty of flavor and texture is an important driver when trying a new snack¹

Expressions

Flavor Escalation



Consumers look for food and drinks that deliver high-impact sensory experiences, where flavor is amplified through heat, texture, layering, contrast, and multi-sensory cues.

Algorithmic Appetite



Digital discovery is accelerating flavor cycles and turning viral moments into real-world consumption. Consumers adopt tastes they encounter through social feeds and streaming content, leading to fast-moving trends, limited drops, and rapid flavor adoption.

Heritage, Amplified



Consumers revisit familiar, traditional flavors from home and heritage, but reimagined into new formats and with added benefits. Brands lean into authenticity and storytelling, spotlighting local producers, regional specialties, and traditional recipes.



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 'neuroscents' 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.

71%
of global consumers agree that nostalgic foods provide them with a sense of familiarity and security during stressful times¹

78%
of global Millennials agree that the food & beverages they consume have an impact on their mental and emotional wellness¹

70%
of global Gen Z are open to new flavors/flavours and ingredients to manage stress¹

Expressions

Mind balance



With growing familiarity around stress response and emotional regulation, brands are using adaptogens and functional ingredients to support mood steadiness rather than stimulation. The focus is on helping consumers maintain emotional balance, smooth out highs and lows, and sustain a calm, positive baseline in demanding, always-on lifestyles.

Sensory design



Cognitive sensory design moves beyond novelty, using flavor, texture, aroma, and visual cues intentionally to guide emotional states. Brands are increasingly designing low-arousal sensory profiles - such as creamy textures, softened sweetness, and warm, rounded flavors - to promote calm and emotional ease, while reserving more stimulating textures for moments of focus or regulation rather than relaxation.



Sleep - the mood foundation



Sleep and stress are increasingly understood as foundational drivers of everyday mood, shaping how calm, patient, and emotionally balanced people feel over time. Foods and beverages designed for evening and wind-down moments emphasize gentle nervous-system support, reinforcing sleep as a core pillar of sustained positive mood rather than a single moment of recovery.

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

With culture shifting from mainstream to niche, consumers have a wealth of lifestyle influencers to follow and options to choose from. Many are taking a more flexible approach to food, drink, pleasure, and rest, indulging one moment and rebalancing the next.

Expressions

Category Blur



Traditional food categories still anchor choice, but their boundaries are increasingly fluid. As consumers prioritize outcomes and moments over rigid labels, distinctions between snack and supplement, beverage and food, indulgence and function continue to blur. This flexibility allows familiar formats to play multiple roles, helping consumers navigate choice without being locked into binary definitions.

Hype the Moment



In a saturated choice environment, novelty acts as a filter. Limited editions, drops, and moment-specific launches create urgency and relevance, helping consumers engage without long-term commitment. Choice Explosion is shifting portfolios from permanence to fast-cycling offerings that reflect rapidly evolving trends, seasons, and cultural moments.

Frictionless Switching



As choice overload grows, consumers are moving away from binary decisions and toward products that allow calibration within the same occasion. Rather than switching brands or categories, they choose how much – sugar, caffeine, or plant-based ingredients – based on the moment. This is driving parallel product versions that maintain the same cues and formats while offering different intensity or composition levels.



57%

of global Gen Z have reduced their alcohol consumption over the past 12 month¹

68%

of Global consumers would be interested in buying hybrid meat products¹

77%

of global Millennials are trying to get used to less-sweet flavors to reduce or limit the amount of sugar in their diet¹

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.



62%

of Global Consumers agree that they are willing to drastically change their lifestyle to live in a more environmentally friendly fashion¹

74%

of Millennials in LATAM believe that the effects of climate change will drastically alter the types of food and beverages available in supermarkets during my lifetimee⁷

60%

of global Gen Z are more likely to purchase food and beverages from companies that practice regenerative agriculture¹

Expressions

Strong Local Food Systems

GROWING

As climate impacts become more localized and unpredictable, food companies are strengthening regional supply networks to secure production and reduce exposure to global disruption. Supporting local food systems is increasingly a practical response to climate risk, enabling more reliable sourcing, greater flexibility, and long-term resilience across the value chain.

Adaptive Ingredient System

EMERGING

As climate volatility increases pressure on sourcing and availability, ingredient systems are increasingly designed to adapt rather than rely on fixed inputs. Food companies are prioritizing ingredients that enable formulation flexibility and consistent performance despite variability in raw materials, costs, and supply, making adaptability a core requirement while maintaining taste, texture, and nutritional quality.

Transparency Drives Choice

GROWING

As sustainability knowledge becomes mainstream, transparency increasingly shapes purchasing decisions. Clear information around sourcing, impact, and ingredients now drives action, pushing brands to move beyond broad claims toward verifiable, easily understood proof.



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.

Expressions

Heritage Ingredients, Modern Rituals



Traditional botanicals and heritage remedies are reframed into modern everyday formats. The story shifts from “exotic” to “trusted” and “time-tested”

Nature, Engineered



Advanced extraction and formulation enable nature-based complexity with recognizable ingredients, and science-led credibility. Brands emphasize why each ingredient is included, how it’s extracted and what benefit it delivers.

Proof of Origin



Products build trust through traceable sourcing and proven provenance - showing where ingredients come from. It may include farm-to-pack storytelling, ingredient maps, QR traceability, and regenerative sourcing claims.



74%

of consumers in APAC are more likely to buy products that are transparent about the farming and sourcing practices behind their ingredients¹

81%

of global Millennials agree that It’s important to stay connected to nature in this more and more tech driven world¹

69%

of global consumers believe regenerative agriculture is key to rebuilding the planet’s natural resources for future generations¹

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.



81%

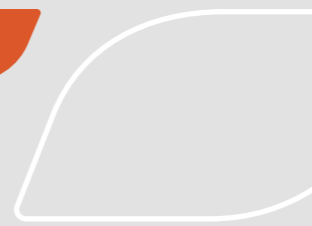
of global Millennials “convenience” is an important factor to determine whether a food or beverage product offers “great value”¹

64%

of global consumers agree that despite economic challenges, they are still willing to pay more for food and beverages that meet their key priorities, like health benefits, taste or convenience¹

76%

of Millennials worldwide agree that, with a limited budget, they prioritize finding products that offer the best value, not just the lowest price⁵



Expressions

Effortless Solutions



Consumers assess value holistically, choosing products that balance convenience, nutrition, satisfaction, and versatility while reducing effort.

Value Management



Consumers shape value through deliberate purchasing choices and expect clear, fair pricing. They actively seek out promotions and smart formats — such as frozen products that offer affordable freshness — to stretch budgets and reduce waste.



Portion-Smart Value



Consumers look for value through clever pack formats that fit their lifestyle — from mini multipacks to portion-controlled snacks and resealable packs that keep products fresh and ready to share.

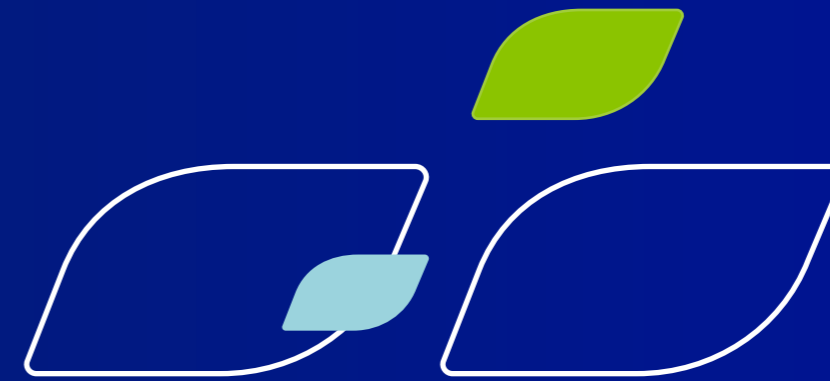
Why ADM?

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.

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



Footnotes

1: ADM Outside VoiceSM Global Lifestyle Survey 2025 (22 countries)

