New protein trend report finds alternative proteins satisfy many consumer preferences

Alicia Humpert, Director
Protein Marketing EMEA
ADM

The global demand for protein continues its meteoric rise, creating a dynamic and competitive landscape for food and beverage manufacturers. Driven by a deepening consumer focus on health, nutrition and holistic well-being, the desire for higher protein intake is reshaping product development across nearly every category. The growth toward purely plant-based and hybrid eating habits presents a pivotal opportunity, forcing the industry to innovate beyond traditional offerings and embrace a more diverse, flexible and sophisticated approach to protein. For brands in the EMEA region, particularly the UK and Germany, understanding the nuanced motivations of distinct consumers will help unlock future growth and usher in the next generation of alternative proteins.

Our latest round of proprietary research focuses on alternative protein innovation in which we examine consumer motivations and the protein sources driving new product development in food and beverage. We take a deep dive to uncover how manufacturers can best leverage these consumer insights. We have identified 'Lifelong Vitality' as an enduring consumer trend and we see plant proteins playing a critical role in the minds and lives of global consumers, with almost 80% of global consumers believing that eating more plant-based proteins will "help me (them [sic]) age better" and 78% believe they will help build or maintain muscle mass/strength.[1] Clearly, manufacturers can leverage plant-based proteins to develop and market new products specifically tailored to consumers' health and wellness goals.

A Holistic Plant-Forward Strategy

To navigate this evolving space, it is crucial to understand the primary consumer archetypes driving the market. The global population can be broadly segmented into two key groups: "plant-forward" consumers and "carefree" consumers. Plant-forward consumers, defined as flexitarians, vegetarians or vegans, are actively engaged with their protein choices. This cohort is consciously seeking to increase their intake of plant-based foods or reduce their consumption of animal products.

In contrast, "carefree" consumers – the largest global group at 49% – eat both plant- and animal-based products without intentionally seeking or avoiding either.[1] This group typically skews slightly older, aligning with the baby boomer generation. While their approach is less ideologically driven, they are not immune to prevailing health trends. A significant 67% of carefree consumers agree that eating more plant protein can improve their overall health, and 73% believe it is healthier to obtain protein from a wide variety of sources.[1]

The opportunity for innovation lies in catering to the distinct, yet sometimes overlapping, needs of these two cohorts. Plant-forward consumers demand nutritional efficacy and alignment with their values. Carefree consumers represent a massive, untapped market for protein diverse products that have the potential to contribute to health and nutrition, without requiring a significant shift in behaviour or, most importantly, a compromise on taste. Blended products, which combine the best attributes of animal and plant proteins or feature multiple plant proteins, are emerging as a vital bridge between these worlds.

Unpacking the Motivations of UK and German Consumers

Within the European market, the UK and Germany stand out as hubs of plant-forward thinking, with 41% of Germans report identifying as flexitarians, the highest proportion among all countries surveyed.[1] Taste and nutrition are ranked highest and equally important[1], a critical insight for formulators. The era of sacrificing sensory experience for functional benefits is definitively over as today's consumers demand both.

However, plant-forward consumers in the UK and Germany are driven by subtly different priorities. Environmental and animal welfare concerns are significantly stronger drivers for German consumers[1], suggesting sustainability credentials and transparent sourcing narratives will resonate more deeply in this market. German plant-forward consumers are also more acutely focused on the functional benefits of protein, specifically for building and maintaining muscle.[1] This aligns with a broader global trend where consumers are seeking to support active lifestyles and healthy ageing. Weight management plays a more prominent role for UK plant-forward consumers. This interest is particularly strong in categories like baked goods, where consumers are looking for healthier indulgences that can support their wellness goals.[1] Regional and cultural distinctions play a vital role in product development. A product positioned around athletic performance and eco-consciousness may capture the German market, while a similar product in the UK might achieve greater success by emphasising its role in a balanced, weight-conscious lifestyle.

How GLP-1 Users Are Affecting Future Formulations

The conversation around weight management is powerfully influenced by the rise of anti-obesity medications (AOMs), such as GLP-1 receptor agonists, a trend which is having a direct and positive impact on the plant-based food market. Globally, 77% of plant-forward consumers already believe that plant-based proteins make it easier to lose weight.[1]

Emerging research shows consumers engaging with AOMs are more attentive to food labels, creating a new and highly motivated consumer segment. In the U.S., 64% of these consumers state they pay more attention to a product's protein content, and 44% are actively increasing their plant-protein intake.[2] Alongside protein, fibre is another key nutrient of interest, with 49% of GLP-1 users looking to increase their consumption.[2]

This creates a clear directive for innovation: new and reformulated plant-based products delivering high protein and high dietary fibre in controlled portions are perfectly positioned for success. This allows manufacturers to expand their target audience, addressing the needs of those on a weight management journey, whether taking AOMs or not.

What Formats UK and German Consumers Want to Try Next

Understanding which product formats are poised for growth is essential. When it comes to alternatives consumers are interested in but have yet to try, distinct patterns emerge in the UK and Germany. German consumers report the highest interest in trying seafood alternatives[1], an area ripe for innovation in both taste and texture. In the UK, the primary interest lies in trying plant-based alternatives for crumbles and grounds[1], suggesting a desire for versatile ingredients that can be easily incorporated into familiar home-cooked meals like shepherd's pie or bolognese.

Across both markets, there is high, shared interest in trying plant-based alternatives for sour cream.[1] This indicates an opportunity to move beyond milk and yoghurt into more culinary and condiment-focused applications when it comes to alternative dairy.

Awareness and adoption of protein sources also vary. UK consumers report the highest awareness of mainstream plant-based proteins.[1] Meanwhile, German consumers are most aware of and likely to use rice, pea, peanut and oat proteins. Notably, lentil has recently debuted in Germany's top five[1], signalling its emergence as a key ingredient for the future.

The Staying Power of Soy

As brands innovate, they should not overlook the foundational strength of legacy proteins, especially soy. As one of the top five most recognisable plant proteins globally, soy has remarkable staying power, particularly with younger demographics. Soy consumers are more likely to be under the age of 45, live in urban areas, and actively follow a plant-based diet.[1]

The positive perceptions of soy are clear: plant-forward consumers associate it with being healthy, nutritious, tasty and safe.[1] Additionally, 83% agree soy protein is a good source for building/maintaining muscle and 81% believe it's a great option for reducing fat intake, along with 79% associating it with a healthy, active lifestyle.[1] This makes soy an ideal ingredient for products targeting the muscle-focused German consumer and the weight-management-oriented UK consumer alike.

To meet this specific demand, industry leaders are enhancing their soy capabilities. For instance, ADM has invested in local facilities in Serbia and Germany to advance protein innovation. Our SojaProtein facility in Serbia processes locally sourced, non-GMO soy, and our Mainz facility in Germany has expanded to process non-GMO soybeans, underscoring ADM's commitment to high-quality, traceable and sustainable protein solutions. Our legacy in plant-based protein innovation began with soy, and we've continually expanded our portfolio to include isolates, concentrates, textured proteins, and flours/grits – ensuring we have the right solution for every application.

In recent years, pea protein has emerged as a major player in this space, with growing consumer awareness and increased usage over the past five years.[1] Our range of powdered and textured pea proteins stands out for its low levels of total aromatics, helping to reduce undesirable beany, earthy and bitter notes – meeting sensory expectations while still delivering strong nutritional and functional performance.

The Rise of Pulses

Beyond soy, other wholesome ingredients are gaining prominence. Chickpea is one of the most recognised plant protein sources globally[1], yet its application has been limited. Primarily consumed as a primary ingredient in dishes like hummus or curries, there is a substantial opportunity to incorporate chickpea protein into convenient formats like ready meals, snacks and sauces.

Lentils are emerging as the "next big thing" in plant protein. While a gap still exists between awareness and consumption, lentils are perceived as extremely healthy, tasty and natural.[1] This positive health halo aligns perfectly with the core motivations of flexitarians. Because lentils are typically eaten as part of a larger dish, they lend themselves well to convenient formats and can be a featured ingredient on packaging to attract health-conscious consumers.

Why Blends May Be the Future

Perhaps the most significant opportunity for near-term innovation lies in protein blends. Hybrids that combine multiple protein sources – be it plant-plus-animal, multiple plant proteins or plant

proteins enhanced with novel ingredients – offer a powerful solution to nearly every consumer demand.

For the discerning plant-forward consumer, blends offer superior nutrition and protein diversity. For the taste-driven carefree consumer, blends can deliver an improved sensory experience, with better texture and flavour that more closely mimics traditional products. By combining familiar proteins like soy or pea with emerging sources like lentil or chickpea, formulators can create products with a more complete amino acid profile, enhanced functionality and a more appealing taste.

Younger consumers are especially open to this approach, with 75% of millennials and 72% of Gen Z interested in trying blended products.[3] Blends also provide a pathway to affordability. "Meat extensions," where plant protein is blended with conventional meat, can increase product volume and offer a value-centric option for cost-conscious shoppers, a strategy that is gaining traction globally.[1]

ADM plant proteins and wholesome, plant-based ingredients perform exceptionally well on their own, and even better when combined to support hybrid or blended protein formulations. These blends unlock new opportunities for innovation by balancing taste, texture, nutrition and cost, leveraging the strengths of each protein source. As health-conscious consumers increasingly prioritise variety, protein diversification is top of mind. In fact, our research shows that 86% of plant-forward consumers believe it's healthier to get protein from a broader range of sources.[1]

Pairing animal-based proteins with ADM high-quality soy, pea and wheat proteins enhances both functionality and nutritional appeal, which is key to winning consumer interest. Additionally, our broad portfolio of wholesome ingredients, including beans, pulses, nuts, seeds and ancient grains, helps power trending formats like plant-based beverages and protein bars with compelling, on-trend protein blends.

Fermentation and Novel Ingredients are the Next Frontier

Looking ahead, technology will continue to unlock new possibilities. When exposed to next-generation alternatives, consumers express the most interest in trying products with novel ingredients, followed closely by hybrid sources and fermentation-derived proteins.[1]

Fermentation is rapidly proving to be the imminent "what's next" technology. Consumer interest and acceptance for its use in meat, seafood and dairy alternatives are growing, especially among younger cohorts. An impressive 72% of millennials and 68% of Gen Z are interested in trying foods with fermentation-derived proteins.[3] While these novel sources gain traction, familiar legacy proteins and blends will remain crucial, serving as a trusted bridge that helps consumers comfortably explore and adopt new technologies.

Innovating in a Protein- & Plant-Hungry World

The future of food is flexible, and protein is at the heart of this transformation. From flexitarians in Germany focused on muscle health to UK consumers seeking weight management solutions, the demands are specific and sophisticated. The path forward for manufacturers in the EMEA region requires a multi-pronged strategy. It means embracing the trusted power of soy, exploring the wholesome appeal of pulses, like lentils and chickpeas, and harnessing the immense potential of protein blends to satisfy taste, nutrition and cost demands simultaneously. By listening closely to the distinct voices of plant-forward and carefree consumers, and by leveraging emerging technologies like fermentation, brands can create the next wave of products to not only meet the needs of today but also nourish the world of tomorrow.

References:

1 ADM Outside Voice , Global Protein Consumer Discovery Report, 2025
2 ADM Outside Voice , Anti-Obesity Medications Survey, 2024
3 ADM Outside Voice , Global Lifestyle Survey, 2025

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