

Reframing soy: Functionality, nutrition and market relevance



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Zero-calorie replacement for sugar's Soy remains one of the most extensively studied and utilised plant-based proteins globally, but consumer misconceptions continue to influence its application in certain markets. Reframing soy through a fact-based lens presents opportunities for manufacturers to establish nutritional and functional benefits to consumers. As one of the top five most globally recognised plant protein sources¹, soy is a stand-out legacy ingredient with staying power.

Plant-forward consumers (defined as flexitarians, vegetarians or vegans) most associate soy with being healthy/nutritious, tasty and safe.¹ Soy also resonates with millennial and Gen Z segments, as soy consumers are more likely to be younger (under the age of 45), urban, follow a plant-based diet and both be aware of and consume a wider variety of plant-based protein types.¹ Soy is not an emerging ingredient, but a proven one that continues to evolve for modern consumer solutions.

Soy is a Complete, Functional Protein Source

A key misconception around plant-based protein is whether non-animal proteins can deliver complete nutritional profiles. Soy is one of the few non-animal proteins with a Protein Digestibility Corrected Amino Acid Score (PDCAAS) of 1.0, containing all essential amino acids in the right amounts. The nutritional quality combined with



strong digestibility positions soy as a viable protein source across a wide range of applications. This versatility and functionality make soy protein an important solution for meat and dairy alternatives, along with active nutrition protein shakes and bars, ready-to-drink (RTD) beverages, bakery and snack offerings, and emerging better-for-you sweet goods.

Beyond complete nutrition, soy delivers functional benefits in formulation, including emulsification for stable product systems and

water-binding capacity to support texture development for improved structure, including bite and chew. These factors and properties make soy especially valuable in applications like plant-based meat alternatives, dairy alternatives and high-protein snacks.

ADM's portfolio of highly functional soy proteins, such as newly introduced European-sourced Arcon® R and Arcon® T, supports targeted formulation outcomes by enabling manufacturers to optimise taste and texture to achieve consistent performance across diverse applications. Available in different sizes and formats, Arcon® R and Arcon® T support the development of meat alternatives, meat extensions and hybrids, and other plant-forward applications.

Additionally, Arcon® R and Arcon® T are clean-tasting with a reduction of overall aroma and aromatics, which supports cleaner labelling and simpler flavour masking strategies, thus reducing formulation complexity. With the majority of plant-forward consumers regarding taste and nutrition with equal importance¹, this sensory benefit becomes a decisive differentiator.

Soy is Excellent Alone and Together with Other Protein Sources

While soy stands strong as a complete protein on its own, innovative blended protein formulations open the door for expanded options that meet multiple consumer demands at once, including an improved sensory experience, greater



nutrition and protein diversity.

Many global consumers believe it is healthier to obtain protein from a variety of sources¹, and 68% of consumers are interested in trying blended or hybrid foods and beverages.² Hybrids that combine multiple protein sources (whether plant-plus-animal, plant-plus-plant or plant-plus-fermentation) introduces consumers to new ways of consuming protein products without needing to drastically change their diets.

Blending soy with traditional animal-derived proteins and other plant-based sources allows formulators to tailor solutions for specific amino acid profiles, optimise texture and improve overall sensory performance. ADM's soy protein is highly functional with a neutral profile, making it an ideal base protein in blends to balance off-notes often associated with other plant proteins. This is particularly valuable in applications like ready-to-drink beverages, bars and meat alternatives, where taste and texture remain critical.

For alternative meat products, plant-forward consumers are most interested in trying plant-based meat alternatives with novel ingredients (76%) and followed by those with hybrid sources (64%).¹ Our research also shows consumers prefer a higher meat-to-plant ratio in hybrids.³ These consumers are intrigued by blends that include plant proteins like soy, along with mushrooms, vegetable blends, beans and pulses.³ There is significant opportunity for brands to fill category gaps with high-quality blended protein formats, including in the categories consumers gravitate towards the most – chicken, beef, pork and seafood.³

In formulation, combining soy with animal-derived protein can help address cost-in-use challenges. There is an opportunity for soy concentrates and textured proteins to partially replace meat in formulations to reduce cost while still providing the attributes needed for meat products like sausages, hams, mortadella, hot dogs, burgers and chicken nuggets. For blended beverages, formulators can combine traditional dairy, such as whey isolates and milk concentrates, with plant-based ingredients like soy. Plus, soy proteins can support the partial replacement of eggs by contributing important emulsification and binding properties. In all cases, replacing any animal-based protein with a soy alternative will deliver products with high protein nutrition quality.

Soy Supports Everyday Wellness & Active Nutrition Goals

Soy closely aligns with today's leading health priorities – particularly weight management, muscle health and longevity related to active nutrition. As consumers increasingly seek tailored and holistic solutions that support both perform-



ance and long-term health, soy offers a unique combination of functional benefits and nutritional density.

From a performance and weight management perspective, soy delivers both high-quality protein and additional functional nutrients, including fibre, making it highly relevant as consumers increasingly prioritize satiety, muscle health and sustained energy. Consumer perception is already strongly aligned with these benefits: 83% of global plant-forward consumers agree 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

This positioning is further reinforced by the rapid rise of anti-obesity medications (AOMs), such as GLP-1 receptor agonists, which are reshaping how consumers approach diet and nutrition. As AOMs promote satiety and reduce overall food intake, the importance of protein becomes even more pronounced, particularly for preserving maintenance of muscle mass. Clinical research suggests that 20–40% of weight lost can come from muscle⁴, underscoring the crucial role of adequate protein intake in this evolving landscape.

In response, there is growing demand for nutrient-dense, protein-forward foods that can deliver more in smaller portions. ADM's portfolio of soy protein, alongside pea and wheat proteins and value-added beans and pulses, enables the development of products that support nutrition and muscle maintenance without compromising on taste or texture. Whether taking AOMs, recently stopping usage or taking a different approach, weight management remains a key driver of plant-based product adoption worldwide. "Managing or losing weight" continues to rank among the top motivations for choosing plant-based snacks, sports nutrition products and ready meals or meal

kits (regardless of AOM usage).¹

Moreover, high-protein products are a cornerstone in sports and active nutrition, where consumers established protein intake in their after workout recovery efforts. Increasingly, these products are being designed to appeal to a broader audience of traditional athletes and everyday consumers seeking convenient, plant-based solutions to support whole-body health. While whey protein remains a staple in the category, plant proteins like soy are enabling new product innovation with high protein content and added functional benefits.

Taken together, these trends reinforce soy's relevance as a versatile, science-backed ingredient that supports modern health goals in areas such as active nutrition and everyday wellness.

Soy for Next-Generation Innovation

As the plant-based category expands, consumer expectations are rising in parallel. Today's consumers demand solutions that deliver on nutrition, proven functionality and an enjoyable sensory experience. Soy is uniquely positioned to meet all three, offering a rare combination of scientific credibility, nutritional completeness and formulation versatility.

For manufacturers, this signals a clear opportunity to move beyond outdated perceptions of soy and reposition it as a strategic, future-forward ingredient. By leaning into soy's evidence-based benefits and broad application potential, brands can unlock new avenues for innovation across categories. Whether in functional foods and active nutrition solutions, alternative meat and dairy applications or hybrid protein formats, soy delivers the performance, flexibility and familiarity needed to find success with consumers. Soy is not just a legacy plant protein; it is a foundational ingredient shaping the next generation of food and beverage innovation.

References:

1 ADM Outside Voice , Global Protein Consumer Discovery Report, 2025

2 ADM Outside Voice , Global Lifestyle Survey, 2025

3 ADM Outside Voice , The Future of Blends, Global Consumer Insights Report, 2024

4 Heymsfield, S. B.; et al. (2014) Obesity Reviews. 15(4): 310–21



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