



Designing the Bite: Multisensory Texture Innovation in Protein



Our Speakers



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Category Drivers & Consumer Demand

There's More Growth Ahead

3,2%

Expected CAGR for EMEA Soy Protein Market



Generational Shift



Reducing Carbon Emissions



Securing Supply Chain

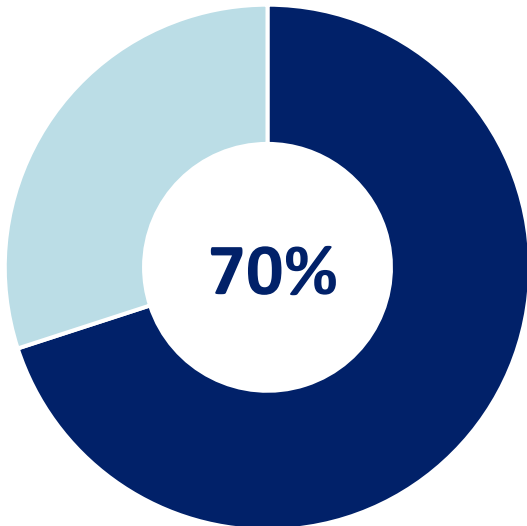


Innovation

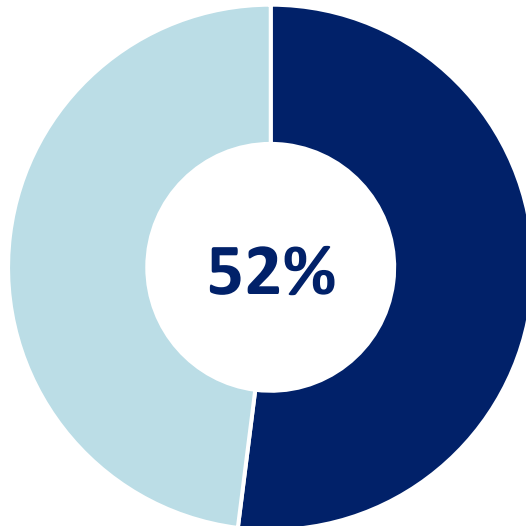
Taste & Texture are Key to Plant-based Product Satisfaction

Barriers to Entry for the Plant-Based Category

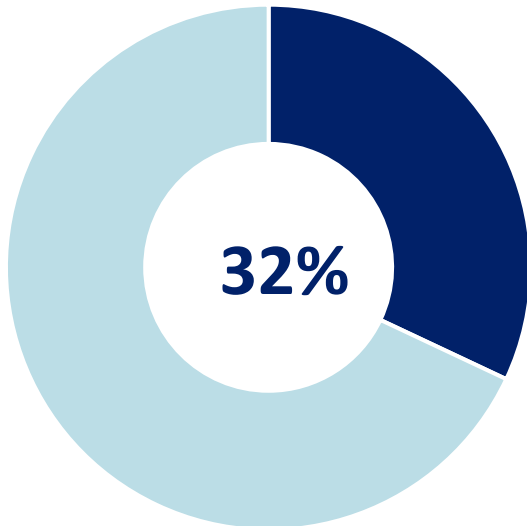
70% of consumers say that taste is important when deciding what food and drinks to buy.¹



More than half of European category users **can't say they are satisfied** with current meat substitutes.



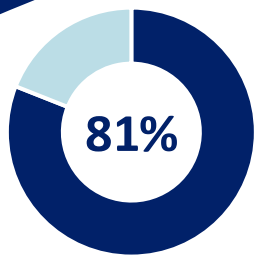
32% of German consumers who don't eat plant-based meat report that the taste of meat alternatives is unappealing



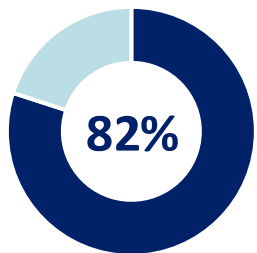
Source: ¹ADM Outside Voice™ Lifestyle Survey, 2025, ²FMCG Gurus, Meat & Plant-Based Global Report, 2025, ³ADM Outside Voice™ Protein Consumer Report, 2025

Taste & Texture are Key to Plant-based Product Satisfaction

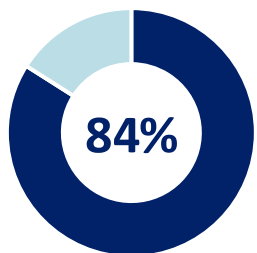
Barriers to Entry for the Plant-Based Category



Agree or strongly agree textures play a big role in whether they find a product enjoyable



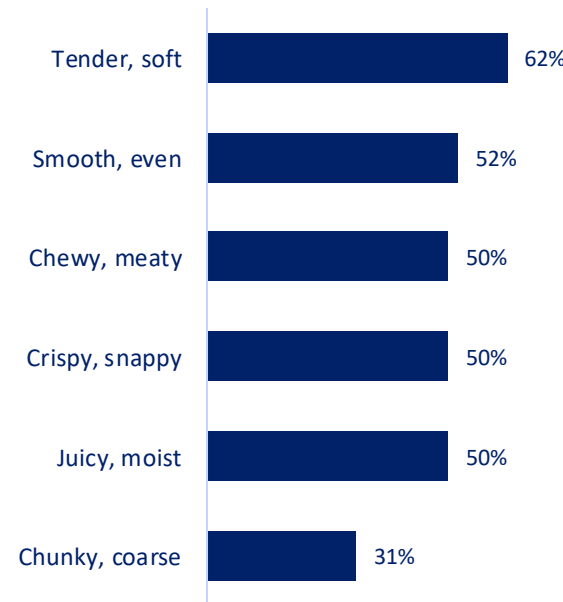
State that “Tender + Juicy” definitely work or might work for plant-based meat alternatives



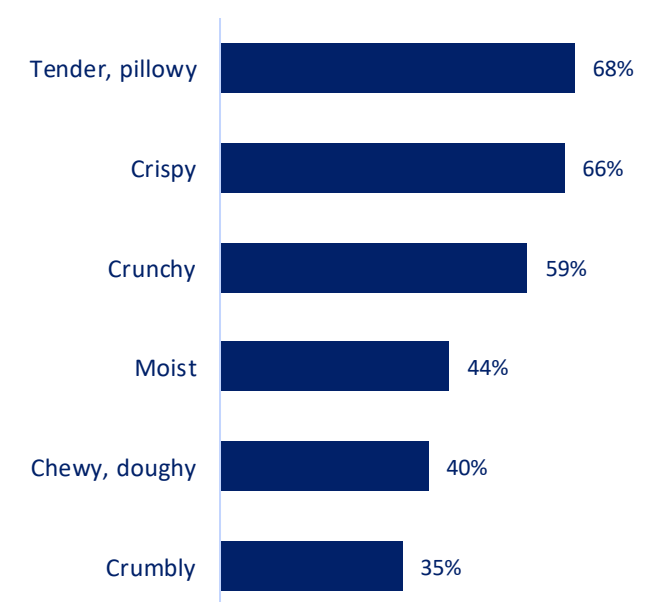
Agree that “Crispy + Puffy” definitely work or might work for baked goods

Consumers Who Have Experienced This Texture Like It

Plant-based Meat Alternatives



Baked Goods





Innovation is in Our DNA

ADM's Continuous Investment in Innovation

ADM recognizes that plant protein solutions must meet consumer expectations without compromise, driven by continuous innovation in ingredient composition, processing technologies, and taste and texture optimization.



Expanding ADM's Presence

**Customer Creation &
Innovation Center at
the Wageningen
University Campus**

Increased Size

and Presence for
Better Service

State-of-the-Art

Extrusion Pilot Plant



Situated in the
heart of the Food
Valley™ Ecosystem



The CCIC is
Scheduled to
Open Q2 2027



Introducing European-sourced Arcon[®]



Introducing European-sourced Arcon® R & Arcon® T



High-quality

- Very clean taste
- Reduced herbal flavor notes, confirmed by expert sensory panels
- High-versatility in different applications
- Expert application expertise & support
- Neutral color



Excellent Texture

- Continuous expansion of textured portfolio
- Decade long expertise in protein extrusion
- Extensive extruder investment in 2022
- Invention of TVP in 1960s
- Consistent extrudability of powdered product
- Outstanding water-binding



Nutrient-rich

- Protein content of >68%, dry base
- High in dietary Fiber
- Complete amino acid profile (soy = PDCAAS 1)



European-sourced and Produced

- European-sourced soy
- Non-GMO
- Third party sustainability verification optionality (Europe Soya and ISCC)
- Kosher & Halal certified



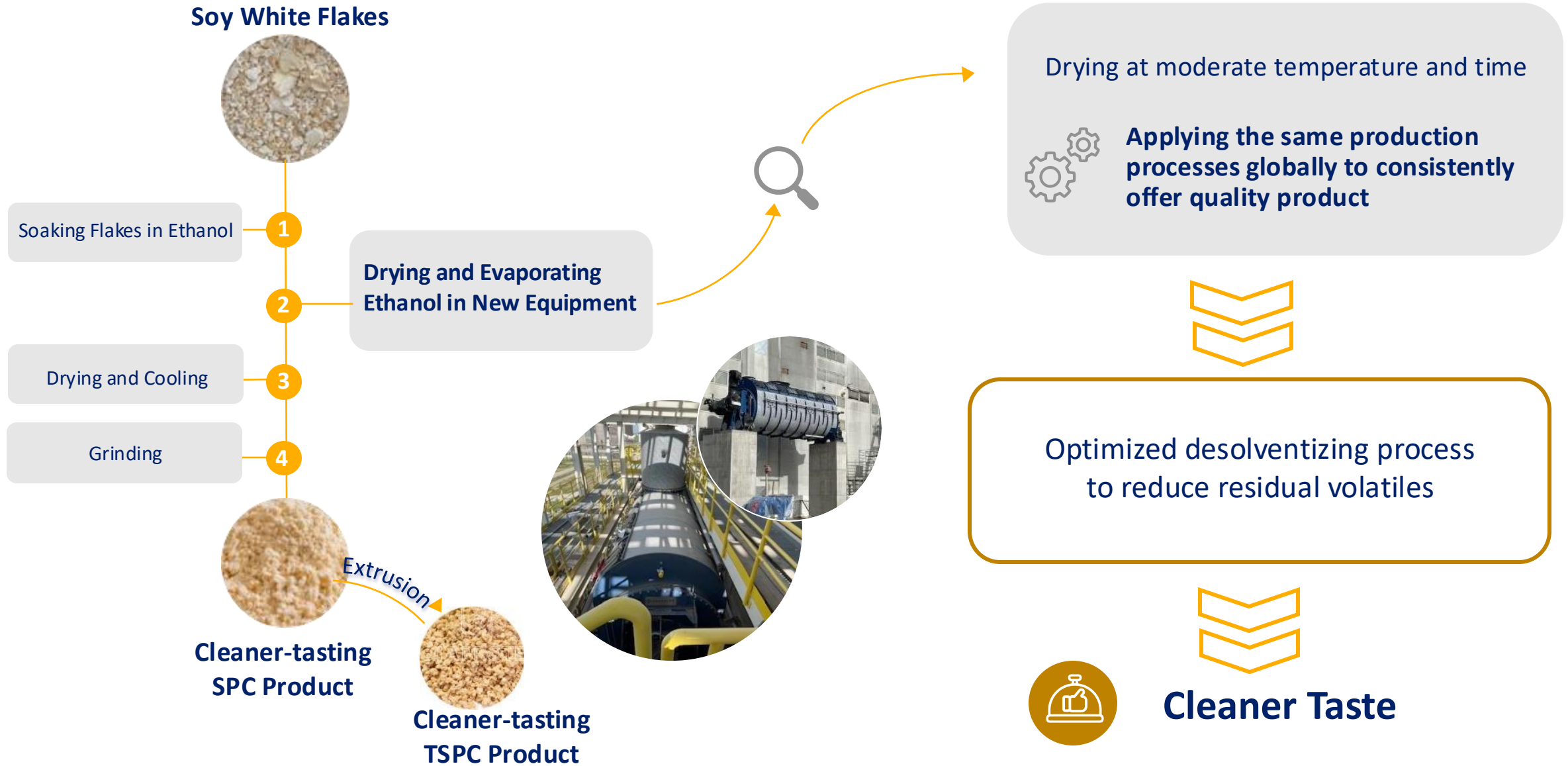
European-sourced Soy at the Highest Standard

Why ADM European-sourced Arcon® ?

- Decades of soy protein expertise and market leadership
- European production aligned with global SPC production processes
- European-sourced product with improved taste
- Global taste & texture standards and multi-region sourcing (Europe, North and Latin America) ensures dependable supply
- Continuous equipment investments for ongoing product innovation



Cleaner-tasting Proteins for Better-tasting Products





Powdered Soy Protein Concentrate (SPC)

Arcon® R Portfolio

Product	Size	Product Codes	Protein	Applications
Arcon® R	<i>Coarse</i>	900 kg: 6030060099720	68 %	Fermentation
	<i>100 mesh</i> <i>min. 90% < 0.150 mm</i>	Bulk: 60300601 900 kg: 6030060199720 25 kg: 6030060197084		Fermentation, Dry Extrusion
	<i>200 mesh</i> <i>min. 90% < 0.075 mm</i>	Bulk: 60300602 900 kg: 6030060299720 25 kg: 6030060297084		High Moisture Extrusion, Meat Alternatives, Meat Extension, Bakery

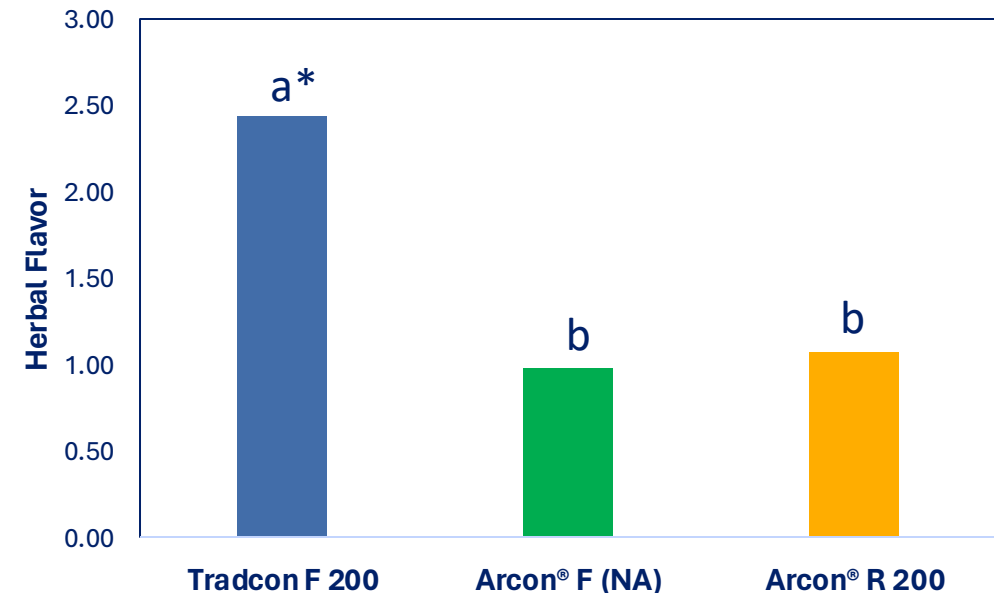


Arcon® R achieves a significant reduction in herbal flavor

Flavor is on par with Arcon® F (NA)

Expert sensory panel evaluation of 3% protein dispersions across multiple flavor attributes confirmed that Arcon® R 200 and Arcon F (NA) showed no perceptible differences between each other.

The reduced herbal aroma in Arcon® R 200 compared to Tradcon F 200 indicates an improved flavor profile following the rotodisc installation.



ADM Soy Protein Portfolio: Arcon® R

Functionality Overview



Hydration



Gelation



Emulsification



Emulsification after Heating

Driving Category Innovation






Across High Moisture Extrusion, Plant-based Alternatives, Hybrids, Bakery and Dry Extrusion.



Textured Soy Protein Concentrate (TSPC)

European-sourced TSPC Portfolio – Arcon® T

Type	Size	Taste Profiles	Applications	Key Benefits
 Minced/ Crumble	Crumble 125 6 mm irr.	Hydration with ADM's savory flavors to achieve the authentic bite consumers crave	Frequently used in products, such as burgers, meatballs or fillings , like in ravioli or dim sum, to achieve a heterogeneous texture in every bite	Expertise in extrusion Cleanest flavor & most neutral color in the portfolio
 Flakes	Flakes 171 3 mm Flakes 172 6 mm	Meat profiles <ul style="list-style-type: none"> • Pork • Chicken • Beef • Lamb 	Our TSPC flakes provide the delicate, flaky texture perfect for plant-based chicken or fish where a firm, authentic bite matters	Outstanding functionality and water binding The industry's broadest portfolio of locally-produced, non-GMO textured soy protein
 Crunch	Midi-Crunch 0.5 - 8 mm	Fish profiles <ul style="list-style-type: none"> • Cod/White fish • Salmon 	Great for ready meals that call for smaller pieces with a higher protein content	For a range of meat and meat alternative applications



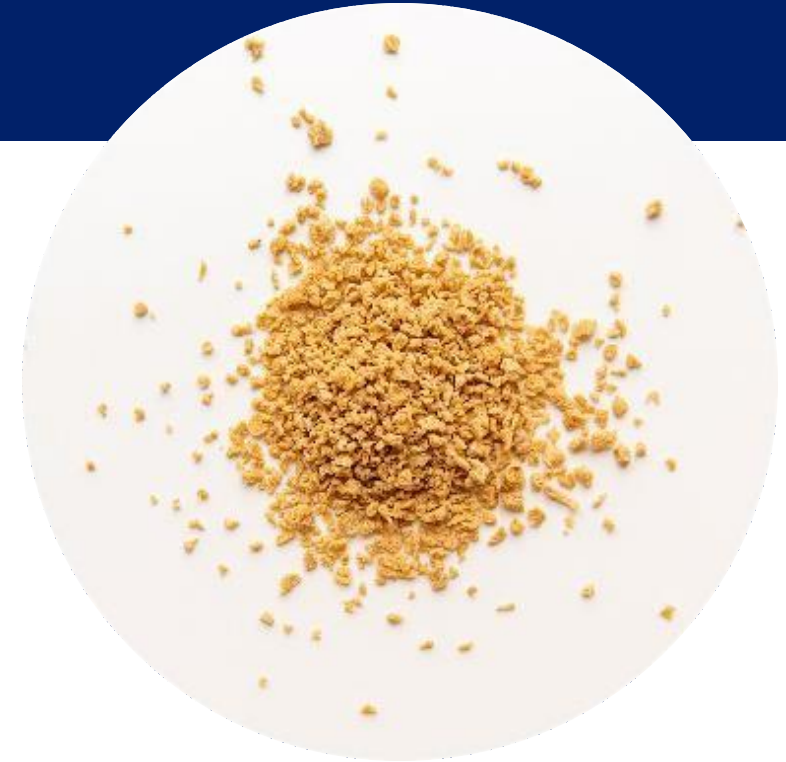
What's Next for Our Textured Protein Portfolio?



Arcon® T Stroganoff



Arcon® T Minced (0.5-5 mm)



Arcon® T Mini Crunch (2-6 mm)



Opportunities for Application Innovation

Protein-Enhanced Cake Type Tiramisu



66% and 72% of consumers are seeking/adding proteins and fiber to their breakfast, respectively.

Concept Highlights:

Indulgent, tiramisu-flavored cake which is a source of protein and fiber, coming from ADM's European-sourced soy flour and protein concentrate.

100% sweetness derived from fruits, using Fruit Up[®], ADM's fruit sweetener to replace glucose syrup in standard formulation.

Key Ingredients:

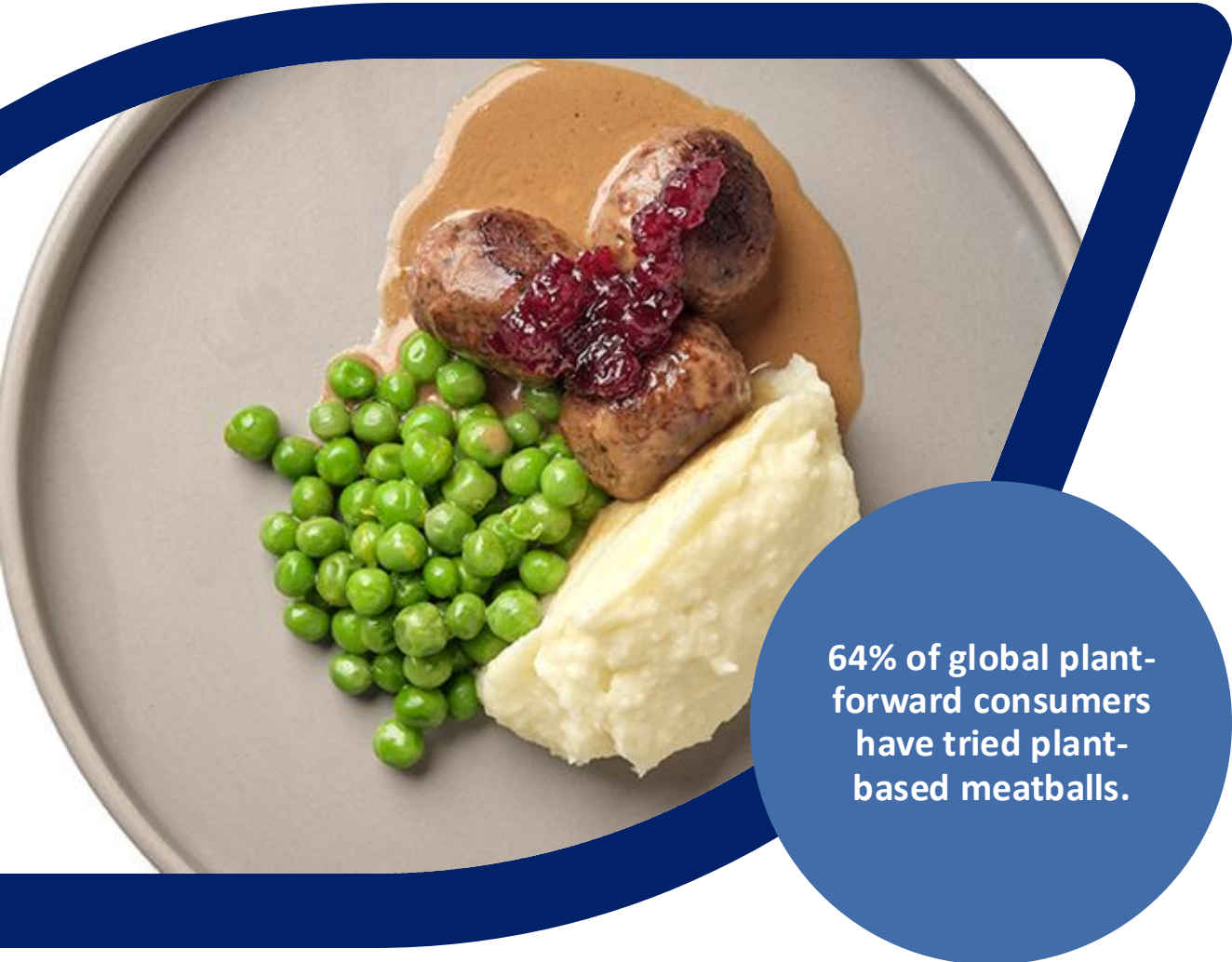
SOPRO[®] UTB 100, soy flour

Arcon[®] R 200, soy protein concentrate

Fruit Up[®], fruit sweetener (apple, carob)

* On-pack claims must comply with EU Regulation No 1924/2006. FruitUp[®], Adlec[®], Arcon[®] and SOPRO[®] are trademarks of ADM or its affiliates registered in the EU and other countries. Any names used for the concept or in connection with the product are not registered trademarks of ADM and serve as examples only. ADM does not warrant that these names are legally available, and any use of those names by our customers is at their own risk and responsibility. This communication is intended for B2B use and no statements are meant to be perceived as approved by regulatory authorities. Local regulations must be reviewed to confirm permissibility of ingredients and claims for each food category.

Plant-Based Eatball



64% of global plant-forward consumers have tried plant-based meatballs.

Concept Highlights:

Tender plant-based meatballs with a savory Mediterranean flavor. Seasoned with garlic, herbs and spices for a rich, authentic, taste.

Great as a snack or a meal; good stability, firm bite and retains juiciness.

Key Ingredients:

- Arcon® T Crumble 125
- AccelFlex™, for binding



Plant-based Bolognese



More than half (57%) of global plant-forward consumers have tried plant-based ground/crumbles.

Concept Highlights:

Plant-based beef grounds are cost-effective and offer a convenient way to enjoy plant protein with the taste, texture and nutrition consumers expect in versatile at-home meal solutions.

Key Ingredients:

Arcon® T Midi Crunch

Natural Beef Type Flavoring

Visit ADM at Booth D12



See our new European-sourced Arcon® in action and taste its incredible functionality integrated into our mouthwatering concepts.