



The Soy Disconnect

Pet Parent Attitudes about Soy for their Pets.



Is time running out on the “no corn, soy or wheat” nutritional philosophy that has impacted the pet food industry for nearly three decades? New consumer research from ADM OutsideVoiceSM indicates this is the case for soy-based ingredients as 80% of today’s pet parents indicate they are either seeking or open-minded to soy in their pet’s food (Figure 1). More pet parents are adopting a flexitarian lifestyle so it is not surprising that soy is a desired ingredient in pet foods and treats. For pet food manufacturers seeking alternative sources of high-quality protein, soy is an obvious solution based on its appeal with today’s pet parents. Now is the time to address the soy disconnect between current formulation practices and consumer desires.

The consumer perception study was conducted by ADM to gain insights into whether the popularity of soy-based meat and dairy products is impacting today’s pet parents and their acceptance of soy-containing pet foods. The study findings are based on responses from 4,381 pet parents who represent dog and cat owners across the United States. The findings align with the current trend of pet humanization and the desire for pet foods to mimic human diets. Key drivers for pet parents are the health and nutritional benefits provided by soy for both themselves and their pets. The vitamin and mineral composition of soy, its high digestibility, and its content of antioxidants and fiber are primary motivators for purchasing soy-containing pet foods and treats (Figure 2).

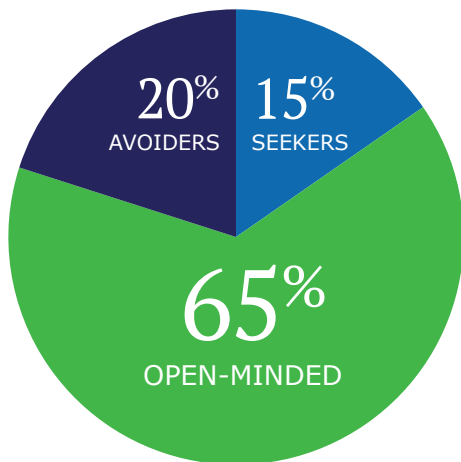


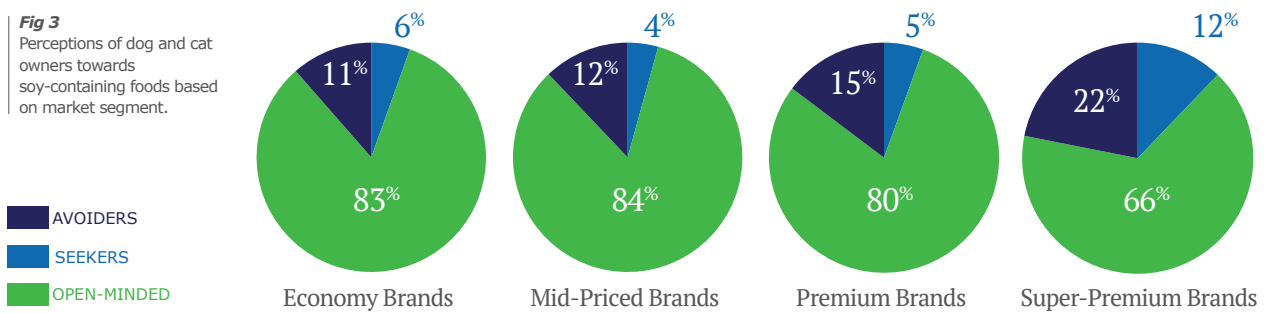
Fig 1
Perceptions of dog and cat owners towards soy-based ingredients for pets.

When thinking about soy in your pet’s food/treats, which of the following benefits would motivate you to purchase products containing soy for your pet?

| | |
|------------------------------|-----|
| SOURCE OF VITAMIN + MINERALS | 54% |
| HIGH DIGESTIBILITY | 48% |
| SOURCE OF FIBER | 40% |
| SOURCE OF ANTIOXIDANTS | 40% |

Fig 2
Key drivers for pet parents when considering soy-containing foods for their pets.

Fig 3
Perceptions of dog and cat owners towards soy-containing foods based on market segment.



Regional differences influence the perception of soy as pet owners on the east and west coasts and southwest regions of the U.S. view soy more positively for their pet’s food. There is an interesting, but not surprising, dichotomy in the responses of pet parents who regularly purchase super-premium pet food brands. These pet owners are more opinionated about soy compared with other market segments as greater percentages either specifically avoid or seek soy in their pet’s food (Figure 3). Despite this dichotomy, two-thirds of these super-premium brand shoppers are open to pet foods and treats containing soy-based ingredients.

ADM has a rich heritage in plant-based solutions resulting in a pantry full of soy-based ingredients for pet food and treat applications (Figure 4). All are highly nutritious and provide a variety of functional properties for a multitude of processing applications. Human food manufacturers continually look to the ADM pantry of soy-based products for protein fortification and processing functionality. Pet food manufacturers should do likewise by partnering with the ADM team of pet nutrition experts when seeking alternative proteins of the highest quality.

| ADM SOY PRODUCTS | PROTEIN CONTENT |
|---------------------------------------|-----------------|
| SOY PROTEIN ISOLATE (PROFAM®) | 90%+ |
| SOY PROTEIN CONCENTRATE (ARCON®) | 65-90% |
| TEXTURED SOY PROTEIN (TVP® & ARCON®T) | 50-70% |
| SOY FLOUR | 50% |
| SOY GRITS | 50% |
| SOYBEAN MEAL | 44-48% |

Contact ADM to discover how soy is being used to develop science-led formulations that support pet health and wellness while simultaneously leveraging its popularity to satisfy pet owners. You can also learn more about the insights gained from the ADM OutsideVoiceSM consumer research that indicates the time is right for a resurgence of soy in the pet food industry.

Fig 4
ADM Soy Protein Portfolio



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