



**2026**

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# **The World of Seeds**

## **Trends and Opportunities**

# Wholesome Ingredients: Ancient Grains, Seeds, Beans and Pulses

## Wholesome ingredients have provided sustenance for millennia

Beans, pulses, ancient grains and seeds have been a primary source of food going back tens of thousands of years and were domesticated, along with other major crops, over four millennia ago. The satiating and nourishing character of beans, pulses and grains have helped make them a mainstay of the world's diet.

## The North American market is seeing a convergence of convenience, nutrition and culinary adventure

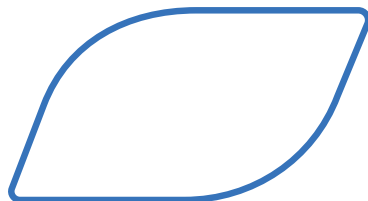
Health-conscious, time-pressed consumers seek convenient, easy-to-prepare options. Beans, legumes, seeds and ancient grains are recognized as familiar, close-to-nature sources of plant-based protein. US consumers show strong interest in these categories as preferred protein sources in plant-based diets. Of these four, seeds provide both nutrition and convenient on-the-go consumption as they don't need to be cooked or dressed up.

Consumer calls for increased protein content are on the rise, with a focus on varied protein sources, heightened nutritional value and pleasing sensory experiences. Brands are highlighting the protein content of wholesome ingredients to appeal to those seeking alternatives to meat as a source of protein. Seeds deliver on both protein as well as on fiber content, which is currently the number one top trend for 2026 as it improves digestive health.<sup>1</sup>

## ADM meets all your wholesome ingredient needs

This market report covers plant-based ingredients including beans & pulses, ancient grains and seeds, with a focus on seeds. It will explore consumer perceptions and the barriers to usage of these products, with the goal of helping manufacturers create more appealing products based on current trends and consumer insights. Let this report be your toolbox/resource/starting point on how to work with ADM to help you develop products that make your consumers' day.

<sup>1</sup>ADM OutsideVoice<sup>SM</sup> Seeds Usage Survey 2026



# Challenges to Wider Acceptance of Seeds

## Low Levels of Awareness

- 38% of consumers don't think of seeds as a snack and 44% don't think of them as a topping.<sup>1</sup>
- More than half of consumers have never heard of or have never tried: flax at 53%, chia at 51% and hemp at 68%, indicating low awareness and trial levels for each type of seed.<sup>1</sup>

## Texture Resistance

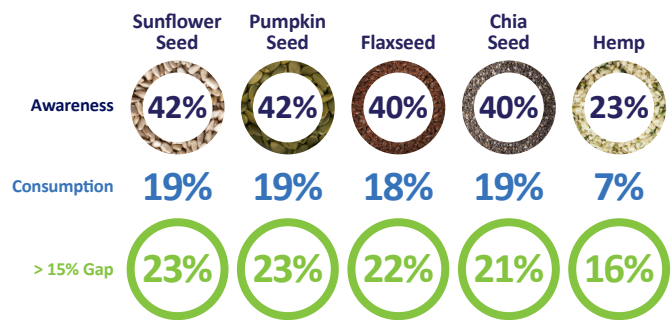
- While a portion of consumers like seeds (25%) for the texture they add, nearly a quarter (24%) of consumers have an issue with/don't like the texture they impart.<sup>1</sup>
- There is an active avoidance factor due to texture; some consumers don't like biting down on seeds or risking them getting stuck in or damaging their teeth.<sup>1</sup>

## Limited Convenience

- 59% of consumers are moderately or very interested in already prepared seed blends<sup>1</sup>
- 78% of consumers prefer purchasing pre-packaged seeds most of the time.<sup>1</sup>

Certain seeds command decent awareness but continue to have lower levels of consumption.<sup>1</sup>

Awareness vs. Consumption Gap US Plant-Forward Consumers\*



<sup>1</sup>ADM OutsideVoice<sup>SM</sup> Global Protein Consumer Discovery Report 2025

\*Plant-forward consumers in ADM research defined as flexitarians, vegetarians and vegans



## Four Key Seeds Consumer Trends

1



**Nutritious  
Food**

2



**Growth of  
Snacking/  
Grazing**

3



**Packaging  
Convenience**

4



**Foods Offering  
Sensorial  
Excitement**

# 1



## Nutritious Food

# How Do Seeds Measure Up?

Consumers are actively seeking more nutritious foods. Seeds can provide an added source of fiber, protein and essential fatty acids while also adding texture to foods as an ingredient or a topping.



**71%**  
of global plant-forward\* consumers consider seeds to be healthy and nutritious<sup>1</sup>

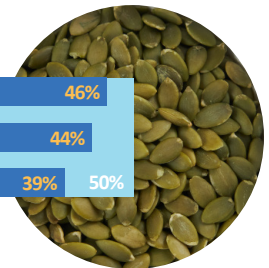
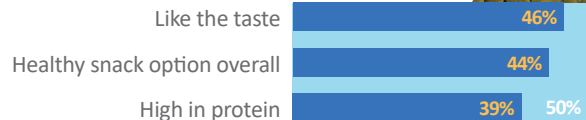
The number one reason consumers gave why they decreased consumption of salty snacks was they're unhealthy. This presents an opportunity to position seeds as a more nutritious choice. Snack products can also be formulated using seeds and seed powders as an ingredient, since seeds are recommended as a part of a balanced diet.

**49%**  
of consumers associate seeds the most with high/added fiber claims<sup>2</sup>

Fiber is a 'Top Trend' for 2026 according to Innova<sup>3</sup> and 46% of global consumers are actively seeking to improve their digestive health<sup>4</sup>. Consumers associate seeds with high/added fiber and provide an excellent opportunity for mindful snacking and to increase the nutritional profiles of other snacks by the inclusion of seeds.

**44%**  
of consumers are eat seeds on their own because they're an overall healthy snack option<sup>2</sup>

### What motivates you to consume seeds on their own?<sup>2</sup>



Health-conscious snacking is a key area that represents a consumer shift, highlighted clearly by the appetite for options with protein rich claims and plant-based ingredients.<sup>1</sup>

<sup>1</sup> ADM OutsideVoice™ Global Protein Consumer Discovery Report 2025

<sup>2</sup> ADM OutsideVoice™ Seeds Usage Survey 2026

<sup>3</sup> INNOVA Global Ingredients Trends 2026

<sup>4</sup> ADM OutsideVoice™ Global Lifestyle Survey 2025

\*Plant-forward consumers in ADM research defined as flexitarians, vegetarians and vegans

## 2



### Growth of Snacking/ Grazing

# How Do Seeds Measure Up?

56% of consumers reported replacing traditional meals with snacks or smaller meals.<sup>1</sup> The main reasons are convenience, higher energy levels and increasing access to healthier snacks, with 45% willing to pay more for snacks with healthier ingredients.<sup>2</sup>

Nuts and Seeds, along with Protein Nutrition Bars, scored highest among all snacks in fulfilling the consumer need for long-term nutrition benefits.<sup>3</sup>

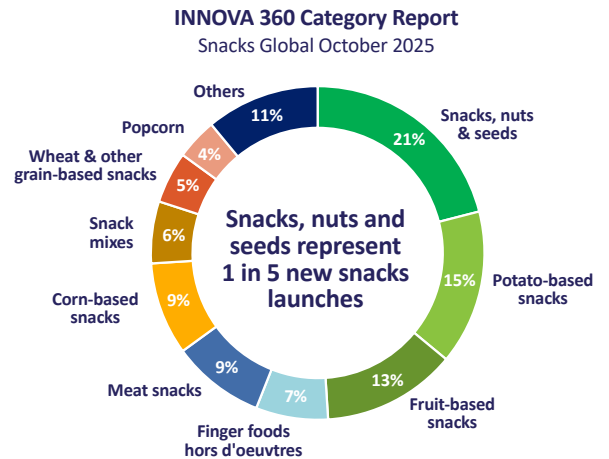
**54%**

of consumers who eat seeds as a snack consume them 2-3 times per week or more.<sup>5</sup>

**67%**

of global consumers are looking for healthy/nutrient rich products to consume as a daily treat.<sup>4</sup>

There has been a 6% increase in the number of launches of snacks in 2025 that contain seeds vs. year ago.<sup>4</sup> This signifies continued consumer interest in new and varied snacking options.



Seeds as snacks span all dayparts, with consumers snacking on seeds in the afternoon being the most common at 44%.<sup>5</sup>

One-third of respondents say the added texture or crunch of seeds for a multi-texture experience is their motivation to add seeds as a topping to foods or beverages such as crackers, trail mixes and dips to go beyond being eaten as a stand-alone snack.<sup>5</sup>



<sup>1</sup> Internationals! Food Information Council Survey 2024

<sup>2</sup> Food Navigator Europe 'Snackification Trend Changing How People Eat, 5/30/25

<sup>3</sup> ADM OutsideVoice™ Uncovering the Truth About Snacking 2026

<sup>4</sup> INNOVA 360 Category Report: Snacks Global October 2025

<sup>5</sup> ADM OutsideVoice™ Seeds Usage Survey 2026

# 3



## Packaging Convenience

# How Do Seeds Measure Up?

Snacking is on the rise, and seeds are widely consumed as a snack, indicating demand for single-serve package sizes to consume on the move, in school lunches, at work and for at-home snacking, providing both convenience and portion control. Blends of seeds containing more than one type of seed or combined with other snack ingredients in a single pack would also fulfill consumer needs.

**94%**

of consumers indicated they were interested in buying snack seed products that blend two or more seeds together.<sup>1</sup>

Blending different types of seeds together or combining seeds with other healthy ingredients such as nuts, dried fruits and legumes for snack mixes, increases the number of pre-packaged consumer options for healthy snacks.

ADM Outside Voice<sup>SM</sup>  
Seeds Usage Survey 2026



*I blend different types of seeds together (e.g. sunflower + pumpkin + chia)*

**21%**

of consumer purchasing decisions when buying salty snacks are driven by packaging size formats<sup>2</sup>

These consumers would benefit from wider availability of seeds in single-serve snack sizes sold singly or in larger multi-pack bags to keep a supply on hand.

*How interested would you be in buying snack seed products that blend 2 or more types of seeds together (products made only with seeds)?*

37%	22%	18%	17%
Moderately	Very	Slightly	Extremely

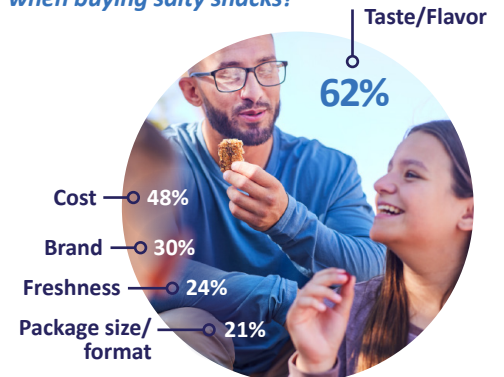
N=966

**30%**

of consumers who eat seeds as a snack purchase them at convenience stores, where almost all packaging is single-serve sizes<sup>1</sup>

This indicates that seeds are often eaten as an on-the-go nutritious snack. Supermarkets and mass merchandisers also frequently place single-serve packs of seeds at the check-out for impulse purchasing, making this figure even higher.<sup>1</sup>

*Which product attributes most influence your purchasing decision when buying salty snacks?*



INNOVA 360 Category Report  
Snacks Global October 2025

<sup>1</sup> ADM OutsideVoice<sup>SM</sup> Seeds Usage Survey 2026

<sup>2</sup> INNOVA 360 Category Report: Snacks Global October 2025

4



### Foods Offering Sensorial Excitement

## How Do Seeds Measure Up?

Multi-sensorial and layered textures are becoming an integral part of the eating experience with consumers seeking interesting combinations and ingredients that can deliver on texture while also providing a nutritional boost. Seasoned and flavored seeds are also popular, with 63% of those consuming seeds as a snack choosing seasoned/flavored seeds at least half of the time.<sup>1</sup>

70%

of global consumers say the novelty of flavor and texture is an important driver when trying a new snack<sup>2</sup>

This presents an opportunity to offer interesting blends and flavors of seeds. Pre-portioned, calorie-controlled and targeted for different dayparts depending on the consumer needs for a filling afternoon snack or an indulgent and flavorful pick me up.

ADM Outside Voice<sup>SM</sup>  
Seeds Usage Survey 2026

*When you buy seeds to eat as a snack on their own, which types do you typically purchase?*



Seasoned/Flavored    Unseasoned/Plain

63%

increase in growth of snacks with multiple texture claims in 2025<sup>3</sup>

Multisensory and texture combinations are a growing trend highlighted by the success of items like Dubai Chocolate. Seeds are a great ingredient to add to snacks, bars, confectionary, crackers, bakery items and other items to provide that added texture complexity while also delivering flavor and an enhanced nutritional profile.

56%

of consumers in the US & Canada look for indulgence in interesting texture combinations.

One-third of respondents say the added texture or crunch of seeds for a multi-texture experience is their motivation to add seeds as a topping to foods or beverages such as crackers, trail mixes and dips to go beyond being eaten as a stand-alone snack.<sup>1</sup>



<sup>1</sup> ADM OutsideVoice<sup>SM</sup> Seeds Usage Survey 2026

<sup>2</sup> ADM OutsideVoice<sup>SM</sup> Lifestyle Survey 2025

<sup>3</sup> INNOVA Top Global Trends in Snacks 2026

<sup>4</sup> INNOVA Top F&B Trends in the US & Canada



## **Three Key Market Solutions**

**We've Identified 3 Promising Seeds Opportunities**

**1**

**Exciting new seed flavors, blends and packaging variations**

**2**

**Expanded seed formats to remove texture barrier for consumers**

**3**

**Seeds as added nutrition in a broad selection of applications**

# Seeds Innovation Opportunity



**1**  
Exciting flavors and new packaging formats

Offer exciting, crave-worthy flavor varieties such as sweet and spicy, hot honey and other on-trend flavor combinations for increased consumer appeal, especially among younger generations.<sup>1</sup>

Create new product formats containing blends of different types of seeds or incorporate seeds as part of a mix with nuts, dried fruits and other complementary ingredients, to be added to a variety of dishes such as salads, grain bowls, yogurts and dips. 45% of seed consumers eat them as a topping on other foods at least 2-3 times a week or more.<sup>2</sup> They can be offered as pre-portioned packages targeted for different applications and daypart consumption, depending on the consumer need.

## Partner with ADM Today



ADM  
MOMENT

**We curate our portfolio to solve your challenges**

- Partner to redefine sweet and savory product development
- Your recipes start with our quality ingredients
- We unlock future-forward innovation



## Efficient, Customizable Solutions for Today's Market

You've seen the consumer trends and opportunities to help you succeed in today's marketplace. Our broad range of wholesome ingredients delivers a nutritional boost for a variety of applications, with certifications available for gluten-free, non-allergen and other specialty requirements.

**Partner with us to leverage our capabilities, enhancing your products and simplifying your production process. Contact us to learn more.**

<sup>1</sup> Datassentials

<sup>2</sup> ADM OutsideVoice™ Seeds Usage Survey 2026



## Custom Blended Solutions

You can save time with our convenient one-bag, custom blended solutions, offering flexible packaging options for both retail and bulk needs'

**Bulk**  
50 lb bags,  
super sack/totes

Our bulk solutions give manufacturers a versatile blend that can be easily incorporated into their own formulations.

**Retail Bag**  
multiple options from 18 oz bag to club pack, private label

**Retail Box**  
ability to package in different retail box sizes

Our retail packs provide consumers with off-the-shelf wholesome products that can be tailored to your brand.

# Seeds Innovation Opportunity



2

Expanded seed formats

Expand acceptance of seeds for those with an aversion to their texture by incorporating powdered versions into a wide range of products such as bakery, protein powder blends and beverages.

**Help consumers think beyond single, unflavored seed types by formulating seeds and seed powders into blended products or as ingredients for exciting new snacks and toppings.**

Seeds are not only great as snacks and toppings but can also be used as ingredients in whole or powdered form to be formulated into chips, crackers, brownies and more.

Seeds are currently only used in 15% of snack bars, a fast-growing segment, and are underrepresented compared to nuts as an ingredient. Seeds can add texture interest, enhance nutritional content like fiber and be a consumer-friendly, close to nature ingredient on the label.<sup>1</sup>

High protein and fiber claims are foremost in 'better-for-you' snacks<sup>2</sup> which seed powders can contribute to.

## Partner with ADM Today



ADM  
MOMENT

### Introducing ADM's NutriStem™ Seeds and Seed Powders

We offer a range of seed and seed powder ingredients while also offering customers the option for custom blended solutions that are available in sizes from bulk format to retail packaging options.



ADM has a broad seed portfolio that offers a wide range of seeds including pumpkin, sunflower, chia, flax and hemp. They are available in options such as organic, non-GMO, pasteurized, roasted, salted and of different origin (US-, European- and Chinese-sourced) to provide a variety of options to fit your labeling needs. Some of our seeds are available in powdered formats with varying protein content levels that can add protein and fiber nutritional benefits to your products.



<sup>1</sup> Innova 360 Category Report Snack Bars Global November 2025

<sup>2</sup> ADM OutsideVoice™ Global Protein Consumer Discovery Report 2025

# Seeds Innovation Opportunity



3

Added Health Benefits

Today's consumers find blends of nutritious ingredients appealing. Seeds can provide delicious, added nutrition as an ingredient in a broad selection of applications. They contain a range of nutrients that can contribute to overall wellness from essential fatty acids to support heart health, fiber to support digestion, protein to support muscle health, antioxidants to protect from oxidative stress and essential vitamins and minerals for overall well-being and body function.

More than 90 percent of women and 97 percent of men don't meet the recommended daily intake for dietary fiber, which is 25 grams for women and 38 grams for men<sup>1</sup>

Growing awareness of the importance of gut health is spurring trends such as 'fibermaxxing'. Fiber is quickly becoming a key focus in food innovation, with more products emphasizing its benefits for satiety, metabolic health, and overall well-being, solidifying its place as a leading health trend. This follows a similar trend of increased protein consumption over the past several years.<sup>2</sup>

To address this growing demand, create new snacking options that fulfill the desire for higher levels of fiber and protein by including seeds in innovative snack blends, and by adding exciting spices and flavors to seeds, making them an enjoyable way to achieve mindful eating goals. Incorporating seeds into dishes for added flavor and crunch offers additional avenues for increasing protein, fiber and essential nutrients in your diet.

## Partner with ADM Today



ADM  
MOMENT

Collaborate with us at one of our state-of-the-art innovation centers. Let us showcase our R&D capabilities, product formulations and innovative approach to addressing industry trends and challenges.<sup>2</sup>



### From ADM's 2025 Innovation Roll-out:

Our Innovative Brownie Brittle with added protein, fiber, postbiotic and four varieties of seeds.

**Let us collaborate with you today to support your product development from concept to commercialization.**

Contact us at: [Nutritioncentralsales@adm.com](mailto:Nutritioncentralsales@adm.com)

Introducing our indulgent new Brownie Brittle product concept that combines a variety of ingredients including seeds, a postbiotic and soy crisps. Emerging science is showcasing the importance of the gut-brain axis, and the ability of the gut microbiome to influence behavior and positively impact mental well-being.

Unwind with a decadent snack powered by wholesome ingredients and an innovative postbiotic to support your wellness goals.

<sup>1</sup> The Department of Health and Human Services

<sup>2</sup> UCLA Health January 6, 2026