



2026

The World of Beans & Pulses

Trends and Opportunities

Wholesome Ingredients: Ancient Grains, Seeds, Beans & 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 4 ingredients, global consumers ranked Beans & Pulses #1 in both being perceived as 'Tasty' and as 'Healthy/Nutritious'.¹ However, compared to broader food categories, beans & pulses taste ranking declines, providing an opportunity for more flavorful products on-shelf and increased consumer education on preparation methods.

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.

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 beans & pulses. It will explore consumer perceptions and the barriers to usage of these products, with the goal of helping manufacturers create more appealing 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.



Challenges to Wider Acceptance of Beans & Pulses

Preparation

Some consumers find beans and pulses challenging to cook correctly, and others don't know how to serve them.¹

- Educate consumers on cooking and serving methods on-pack
- Offer convenient, microwaveable ready-to-eat products in order to lower preparation barriers

Tastiness

Beans and pulses are perceived as tasty by nearly half of current consumers, but others consider them to be relatively bland and unexciting.²

- New and exciting products on-shelf with added spices and combined with other ingredients
- On-pack recipes and serving suggestions with inspiring imagery to increase the taste appeal of finished dishes

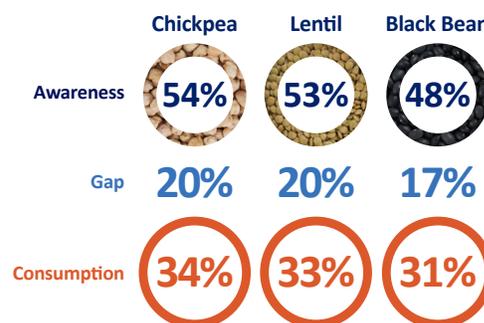
Digestibility

Beans and pulses are sometimes associated with digestive issues and discomfort.¹

- Combine with other ingredients such as grains to make more digestible
- Highlight instructions to rinse and soak dried beans and pulses before cooking to increase digestibility and shorten cooking time

Certain beans and pulses command decent awareness but still have lower levels of claimed consumption²

Awareness vs. Consumption Gap
US Plant-Forward Consumers*



¹ADM OutsideVoiceSM Beans & Pulses Usage Survey 2026

²ADM OutsideVoiceSM Global Protein Consumer Discovery Report 2025

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



Four Key Beans & Pulses Consumer Trends

1



**Global
Culinary
Exploration**

2



**Getting Beans
& Pulses Out
of the Can**

3



**Packaging
& Preparation
Convenience**

4



**Nutritious
Food**

1



Global Culinary Exploration

How Do Beans & Pulses Measure Up?

Consumers are seeking more authentic global flavors, dishes and products. Beans and pulses are used in a variety of traditional cultural dishes across the globe and younger consumers are seeking those kind of authentic experiences.

Nearly 1/3

of consumers under the age of 30 said precooked beans and pulse products are too lightly seasoned.¹

51%

of all global consumers say they like to try street food-inspired flavors in packaged products and are increasingly looking for cuisines from other countries.³

59%

of ready meal consumers say taste/variety is their primary purchase driver and

1/3 make tweaks to add sensorial excitement.⁵

65% of consumers say Flavor & Taste is the most important aspect in traditional foods² Gen Z'ers say that many on shelf products are too lightly seasoned and are seeking bigger, bolder and more global flavors.

Consumers are seeking more globally inspired flavors, with both Millennials and GenZers being both more adventurous and emotionally connected to food than older generations. They are searching not just for products that are influenced by global cuisines, but for truly authentic flavors and dishes. The fastest growing ready meals and side dishes category is sweet & spicy with a 156% increase and, specifically, those containing red lentils grew by 119%.⁴

Ready meal consumer comments echo the broader desire for more exciting, authentic and flavorful food choices. More culinary influences on products would increase purchase intent.⁶

ADM Ready Meals US Research Report 2025

"I would like to see more meals from different cultures. Also, sometimes the meals taste bland - I would like them to have more of a distinct flavor."

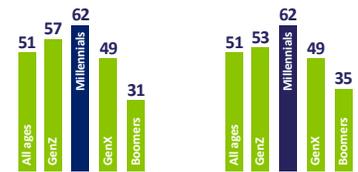


"I put more seasoning in it because it's kind of bland and I like to mix it up before heating it up."

"I usually add something from my home to make the foods a little better. An example: for a prepared meal, I might add fresh produce from inside my house like tomatoes or onions."

Innova Flavor Survey 2025

To what extent do you agree with the following statements.



"I like to try street food-inspired flavors in packaged products"

"I am increasingly looking for cuisines from other countries"

Younger consumer are most adventurous in their choices of cuisine

62%

Almost 2/3 of Millennials seek out the variety of international cuisines

Gen Z are flavor explorers:

More than 1 in 2 favor street food-inspired flavors at 57% & cuisines from other countries at 53%

¹ADM OutsideVoice™ Beans & Pulses Usage Survey 2026

²Innova Trends Survey 2026

³Innova Global Trends and Convenience Meals 2025

⁴Innova Market Insights 2025

⁵ADM OutsideVoice™ Global Lifestyle Survey 2025

⁶ADM Ready Meals US Research Report 2025

2



Getting Beans & Pulses Out of the Can

How Do Beans & Pulses Measure Up?

With positive consumer perceptions in both flavor and nutrition, beans and pulses are increasingly used in various products from snack items to convenience meals and more, as well as expanded dayparts.

Only **18%** of total consumers say they eat beans and pulses for breakfast. But jumps to **30%** for those under age 29.¹

73% of consumers consider beans as 'tasty'. This number declines to 42% for chickpeas and to 38% for lentils.⁴

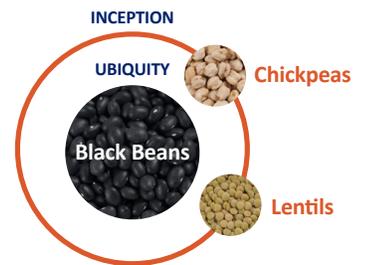
Bean and pulse based flavors are the fastest growing in plant-based & vegetable global convenience meals.²

This presents an opportunity to expand and offer more bean and pulse products for the breakfast daypart in where younger consumers who are more diverse, culinarily adventurous and seeking more authentic products. Looking at foodservice menu trends, chickpeas and lentils are in the early stage of the menu adoption cycle in breakfast proteins.

Beans have a high association with taste, but pulses receive lower marks. Mixing pulses with familiar ingredients like rice and other grains in ready meals as well as formulating pulse ingredients into everyday formats like snacks and soups will increase their appeal to and acceptance by consumers. Additional benefits are the creation of a more nutritional and complete dish as well as providing added flavor interest and impact.

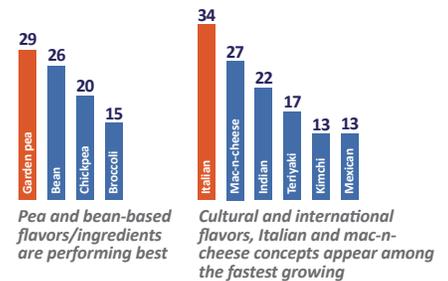
When looking at plant-based convenience meals launches, those containing beans are up +26% from 2021 to 2025, while those containing chickpeas come in at +20%.³

Menu Adoption Cycle Breakfast Proteins



Innova Market Insights 2025

Fast-growing flavors in the on-trend plant-based & international cuisines categories



¹ADM OutsideVoiceSM Beans & Pulses Usage Survey 2026
²Innova Global Trends and Convenience Meals 2025

3



Packaging & Preparation Convenience

How Do Beans & Pulses Measure Up?

Trends indicate demand for smaller portion sizes, convenient packaging and easy-to-prepare formats that increase product accessibility. This will encourage increased trial of beans and pulses and expand their use to additional dayparts.

Convenient, easy-prep versions

The fastest growing packaging option for beans and pulses is microwaveable pouches.¹

Among ready meal consumers, over half say short prep times would increase their likelihood to purchase. Products should strive to meet consumers' ideal 5-minute preparation time threshold.^{2,3}

Top Two Features to Increase Purchase Intent



ADM Ready Meals US Research Report 2025

44%

of current beans and pulses consumers consider them easy to cook or prepare.⁴

Most consumers find beans and pulses easier to cook and prep relative to other healthy foods like ancient grains, however, convenient options such as microwaveable pouches and pop-top can lids to make them even more easily accessible continue to grow.



Beans are eaten much less frequently outside of lunch and dinner:

Only **18%** at breakfast and **11%** as a snack at night. ⁴

As an example, Hispanics have a cultural leaning towards consuming beans at breakfast or as snacks, but there is a gap in the availability of convenient options for these dayparts. This presents an opportunity to offer innovative products and packaging to fill this need. Demand for all day consumption will continue to grow as acceptance of foods from a broader range of cultures expands.



¹ Mintel GNPD 2025

² ADM Ready Meals US Research Report 2025

³ Kantar Profiles/Mintel 2023

⁴ ADM OutsideVoiceSM Beans & Pulses Usage Survey 2026

4



Nutritious Food

How Do Beans & Pulses Measure Up?

Consumers are actively seeking more nutritious foods. beans and pulses provide an added source of protein and fiber while also having a neutral taste palate that combines easily with other ingredients.



73%
of global plant-forward consumers perceive beans, pulses and legumes to be healthy/nutritious.¹

The number one reason consumers gave why they decreased consumption of salty snacks was they're unhealthy. This presents an opportunity to formulate more of these products with beans and pulses which are perceived as being 'more healthy'.²

46%
of consumers associate beans and pulses with high/added fiber claims.³

Fiber is the number one Top Trend for 2026 according to Innova and 46% of global consumers are actively seeking to improve their digestive health. When we asked consumers their association with claims when it comes to beans and pulses, the top 3 claims consumers chose are Natural, High/Added Protein and High/Added Fiber.³

43%
of consumers are seeking high nutritional value and minimally processed¹ ingredients in their food products⁴

Consumers are willing to pay more for products that are low/no added sugar, organic and minimally processed.⁵



Characteristics that would increase likelihood to buy/pay more for products made with plant-based proteins, 2025

	More likely to buy/to pay more ⁵	
	More likely	More willing
Low sugar	58%	31%
Organic	42%	38%
Minimally processes	42%	28%

¹ ADM OutsideVoiceSM Global Protein Consumer Discovery Report 2025
² Savory Biscuits and Crackers in the US 2025
³ ADM OutsideVoiceSM Beans & Pulses Usage Survey 2026
⁴ ADM OutsideVoiceSM Global Lifestyle Survey 2025
⁵ ADM Outside Voice Global Protein Consumer Discovery Report 2025
 *Plant-forward consumers in ADM research defined as flexitarians, vegetarians and vegans



Three Key Market Solutions

We've Identified 3 Promising Bean and Pulse Opportunities

1

Exciting Flavor Variations

People are looking for more authentic and flavorful options including more spice variety and intensity.¹

2

Expanded Usage Occasions

Use as an ingredient in appetizers, side dishes, snacks and more for expanded daypart and usage occasions.

3

Convenient Format Options

Microwaveable pouches are the fastest growing format for beans and offer quick and easy preparation and handling.²

¹ Innova Flavor Survey 2025

² Mintel GNPD 2025

Beans & Pulses Innovation Opportunity



1

Exciting
Flavor
Variations

Offer exciting, crave-worthy flavor varieties, cultural authenticity & uniqueness for increased consumer appeal, especially among younger generations.

Address the current shortcoming of authentic, adventurous flavors

Some consumers perceive beans and pulses as bland; flavor can be boosted with added herbs/spices/culinary ingredients that also address trend toward more flavorful highly-spiced foods.

Offer products containing beans and pulses that appeal to consumers' growing desire for new culinary experiences and authentic cultural cuisines e.g.; Indian Dahl and Puerto Rican-style Beans (Habichuelas Guisadas).

Partner with ADM today



ADM
MOMENT

We curate our portfolio to solve your challenges

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

Global flavors and fusions that use new and different ingredients open doors for broadening the consumption of both beans and pulses.

Introducing the ADM Pipian Verde White Bean Dip as a delicious, bean-based dip inspired by the bold, authentic flavors of Mexico City. This dip features NutriStem™ navy bean grits, pepitas and sunflower seeds that delivers the perfect balance of taste and nutrition, fulfilling the demand for wholesome, delicious snacks.¹

¹ Datassential



Beans & Pulses Innovation Opportunity



2

Expanded
Usage
Occasions

Expand usage occasions to create an opportunity for additional daypart usage of beans and pulses, given they are currently found most often in center of plate or side dishes.

Help consumers think outside the can by formulating bean and pulse ingredients into snack and bakery products

Bean and pulses are not only great as center of the plate and side dishes but can also be used as ingredients to be formulated into chips, crackers, brownies and more.

The current offering of primarily plain beans decreases on-shelf appeal. Expanding offerings of bean-based dips & spreads both on their own and in snack kits with crackers, veggies or chips for a wider variety of usage occasions beyond just main and side dishes, to expand into other daypart consumption.¹

High protein and fiber claims are foremost in 'better-for-you snacks'¹ which beans and pulses are perfectly positioned to contribute to.²

Partner with ADM today



ADM
MOMENT

Introducing ADM's NutriStem™ Bean and Pulse Powders and Grits

We offer the ability to create your own unique blend of beans and pulses with other on-trend wholesome ingredients.

Available in black, navy, pinto and small red beans as well as chickpea.



NutriStem™

ADM is the largest vertically integrated supplier of beans and bean ingredients in the U.S. and offer a broad portfolio to help you in your procurement and formulation needs.

From raw whole beans and pulses, to precooked versions to powders and grits, our broad portfolio can fulfill all your formulation needs. Specifically, our powders and grits are perfect incorporating into snacks (chips, crackers, etc.), bakery items (brownies, muffins, etc.) and other applications. Beyond the nutritional and flavor benefits of beans and pulses, the powdered ingredients can also function as thickeners and stabilizers in soups, dips and more. Partner with us to leverage our capabilities, enhancing your products and simplifying your production process. Contact us to learn more.

¹ ADM Global Protein Consumer Discovery Report 2025

² Innova Snacking Survey 2024

Beans & Pulses Innovation Opportunity



3

Convenient
Format
Options

Today's consumers find blends of healthy ingredients appealing.¹ Integrate beans and pulses as an ingredient in familiar products across a range of categories and package them in new, convenient formats to fulfill this demand.

Demonstrate beans and pulses' broad versatility with options beyond main meal and sides

Capitalize on the interest among Gen Z for trying new products and foods by incorporating beans and pulses into snacks, bakery items and even as parts of meal kits or prepared meals.¹

Focus on quick and convenient options such as microwavable pouches that are simple, easy to clean and saves preparation time for consumers. It's also important to make sure these formulations provide authentic and flavorful eating experiences.

Partner with ADM today



ADM
MOMENT

Collaborate with us at one of our state-of-the-art innovation centers. Let us showcase our annual ingredient and full solution innovation stage-gate approach to address industry trends and challenges.²

From ADM's 2025 innovation roll-out:

Our Innovative Microwavable Zest Zhough Grain & Bean Bowl



Easy Prep

- ✓ On-the-go
- ✓ Lunch away from home
- ✓ Snacking

Introducing our pouched, microwavable Zesty Zhough Grain and Bean Bowl developed to offer a convenient, healthy and on-trend option, making meal prep quicker and easier for consumers.

This new product concept combines a variety of wholesome ingredients including grains and beans. It features a globally-inspired flavor profile appealing to consumers who are seeking nutritional side dishes that are convenient and easy to prepare.

We're your one-stop source for product development from concept to commercialization.

¹ Innova - Gen Z Eaters, December, 2025

² ADM Netnography Proteins Final Insight Study