



The Pendulum Effect

Acceptability of Soy, Corn & Wheat for Today's Pets



The pendulum of public opinion may be swinging back toward a positive view of soy, corn, and wheat for pets. OutsideVoiceSM is one consumer research tool used by ADM to quickly gain insights on the attitudes, preferences, and behaviors of today's consumers. Using this proprietary tool, the ADM Pet Solutions team sought to understand current perceptions about soy, corn, and wheat in today's pet foods, especially considering growing interest in plant-based ingredients and sustainability.

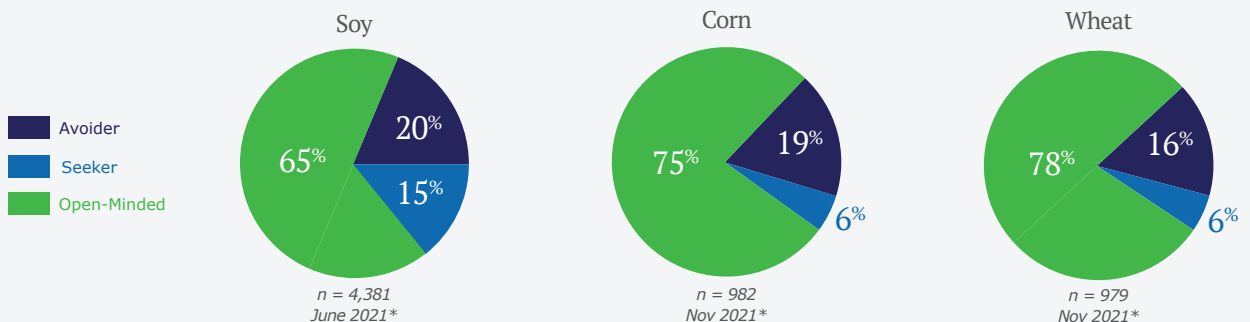
Three independent consumer surveys conducted by ADM revealed 80% of today's U.S. pet owners are intentionally seeking or open to soy, corn or wheat in their pet's food and treats (Figure 1). While 20% of today's pet owners are still avoiding these ingredients, they do not represent the majority of pet parents. This is welcomed news for

pet food nutritionists and formulators who have long recognized the excellent nutritional and functional properties of these legacy ingredients for pet foods and treats. This changing paradigm also provides more opportunities for manufacturers to develop pet products that mimic human foods and snacks due to the popularity and widespread use of these ingredients in the human food industry.

Based on survey results, today's pet parents are seeking or open to soy, corn and wheat for their pets because they recognize and desire the nutritional and health benefits these ingredients provide to their pet (Table 1). Flavor and digestibility aspects of these ingredients were also listed as key motivators for choosing pet products with these ingredients as well as recommendations from their veterinarian.

Figure 1: US pet parent perceptions of soy, corn & wheat for their pets

Thinking about what you feed to your pet (food/treats), please indicate whether you are deliberately **avoiding/reducing** or **seeking/adding** *INGREDIENT* in your pet's daily diet



*Source: ADM Outside Voice

Table 1: Key reasons US pet parents are choosing products containing soy, corn or wheat

INGREDIENT	MOTIVATOR	PET PARENT VERBATIMS
Soy	<ol style="list-style-type: none"> 1. Health/Nutrition 2. Taste 3. Recommendations 	<ol style="list-style-type: none"> 1. "I like to add soy to my pets' food because it provides nutrients that help improve my pet's health" 2. "I like that it is healthy and adds flavor to my cat's diet" 3. "Due to its high content of fiber and plant-based protein, it would have benefits for my pet's digestion"
Corn	<ol style="list-style-type: none"> 1. Health/Nutrition 2. Taste 3. Recommendations 	<ol style="list-style-type: none"> 1. "I try to make my pets eat healthier" 2. "Corn is a good carbohydrate to incorporate for my pet's diet." 3. "Because it is a source of fiber and vitamins that would help my pet's body"
Wheat	<ol style="list-style-type: none"> 1. Health/Nutrition 2. Digestion 3. Taste 	<ol style="list-style-type: none"> 1. "I am looking to add wheats into my pets diet because it is a good source of protein and helps provide energy." 2. "I feel like wheat could also be helpful for an animals diet." 3. "I eat it as a good grain for gut and also healthier one for me, so I asked his Vet and She said that it is good for them, most dogs are not allergic to it, and they need fiber just like we do."

To understand the appeal of different ingredients for pet foods and treats, the survey participants were presented with lists of various soy, corn, and wheat based ingredients and asked the question: Thinking about ingredients in your pet's food... When you're buying your pet's food and look at the

ingredients label, how appealing would it be to see the following (soy/corn/wheat) ingredients listed on the label? 1 = not at all appealing; 5 = very appealing. The ranking of the individual ingredients from the most appealing to the least appealing is shown in Table 2.

Table 2: Appeal of soy, corn, and wheat ingredients to US pet parents

	Corn Ingredients	Wheat Ingredients	Soy Ingredients
More Appealing	Corn	Wheat	Soy Protein Concentrate
Neutral	Ground Corn	Ground Wheat	Soy Flour
Less Appealing	Corn Meal	Wheat Flour	Textured Soy Protein
	Corn Protein Concentrate	Buckwheat Flour	Soybean Meal
	Corn Grits	Wheat Bran	Soy Protein Isolate
	Corn Bran	Wheat Germ Meal	Soybean Grits
	Corn Oil	Vital Wheat Gluten	Soybean Hulls
	Corn Germ Meal	Wheat Germ Oil	
	Corn Gluten Meal	Wheat Shorts	
	Corn Syrup	Wheat Middlings	

Corn, ground corn, and corn meal are the most appealing of the corn-based ingredients, while corn oil, corn germ meal, corn gluten meal, and corn syrup are the least appealing. Corn protein concentrate, corn grits, and corn bran are intermediate in their appeal to the survey participants. Wheat, ground wheat, wheat flour, buckwheat flour, and wheat bran are the most appealing wheat ingredients. In contrast, wheat shorts and wheat middlings are the least appealing. Wheat germ meal, vital wheat gluten, and wheat germ oil are intermediate in their appeal, but generally trend towards the least appealing of the wheat ingredients. For the soy-based ingredients, soy protein concentrate, soy flour, and textured soy protein are most appealing, while soybean grits and soybean hulls are least appealing. Soybean meal and soy protein isolate are intermediate in their appeal to today's pet parents.

The survey results clearly show 4 out of 5 pet parents are willing to purchase pet foods and treats containing soy, corn or wheat with certain products being more appealing than others. Today's pet owners recognize the nutritional and health benefits these ingredients provide to their dogs and cats.



The pet food industry is continuously evolving and staying at the forefront of trends is paramount for success. ADM's consumer insights suggest that including soy, corn or wheat ingredients in pet foods and treats may not be as negatively perceived by pet parents as once thought. Ultimately, increasing the ingredient options for use in pet foods allows for the creation of a greater variety of products to meet the individual nutritional needs of pets while satisfying the desires of today's pet parents.

At ADM, we have the industry's most comprehensive portfolio of pet food and treat ingredients which includes a variety of soy, corn, and wheat products. These ingredients provide the nutritional and functional needs for your products. They also ensure your products are meeting the desires and expectations of today's pet parents. When you partner with ADM as your nutrition solution provider, you also gain access to our team of scientists, engineers, and nutrition experts that can help you solve today's problem and develop tomorrow's innovation.



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