

Unlocking the Opportunities in
Plant-Based Dairy



Delivering the taste consumers want from plant-based dairy is a huge opportunity.

Dairy represents one of the largest growth markets in plant-based foods. And the food manufacturers best poised to win are those who successfully deliver on the largely untapped taste and texture expectations of consumers: understanding what motivates those who have bought plant-based dairy products to buy more, and what will trigger non-purchasers to engage in the category.

As the only company singularly focused on the taste of dairy, Edlong is proud to present this special report on what consumers are looking for in plant-based dairy—to help you unlock the big opportunities to move your business forward.



Conducted Comprehensive Research on Plant-Based Dairy

QUALITATIVE



75-minute virtual one-on-one interviews
with plant-based meat/dairy alternative consumers



2-hour focus groups
with plant-based meat/dairy alternative consumers

QUANTITATIVE



Nationally represented online survey
exploring plant-based meat/dairy alternatives, perceptions, purchasing and usage



DEMOGRAPHICS

Mix of genders, ages, HH income, ethnicity, geography

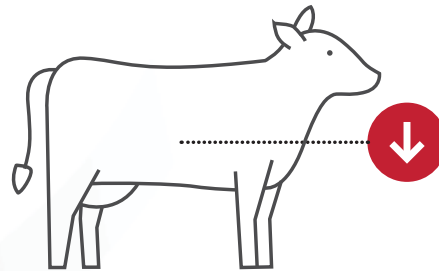
Adoption of Plant-Based Foods Doesn't Happen Overnight

Consumers may pursue any or all of 3 paths when exploring plant-based



Trading up *within* animal products

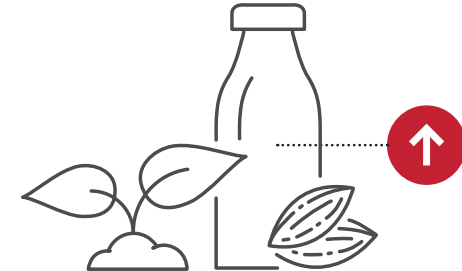
Buying only higher-quality products:
grass-fed, organic, pasture-raised



Reduction of animal products

Reducing frequency of consumption

-
Reducing portion size



Trading in plants

Increasing vegetable/legume
portion size on plate

-
Replacing some dairy with
plant-based analogues

-
Incorporating more
vegan-focused cuisines



**A FLEXIBLE
EXPLORATION**

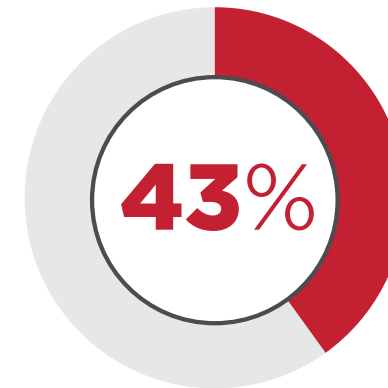
*Driven by flavor, wellness,
dietary variety and ease*

Plant-Based Milk Leads the Way into the Category



Milk alternatives are the typical entry point to plant-based options

Consumers often start with milks, driven by **dairy milk contaminant concerns** (hormones, antibiotics) and **effects on the body** (inflammation, lactose intolerance)



of consumers have
**purchased a
plant-based milk**



KEY INSIGHT

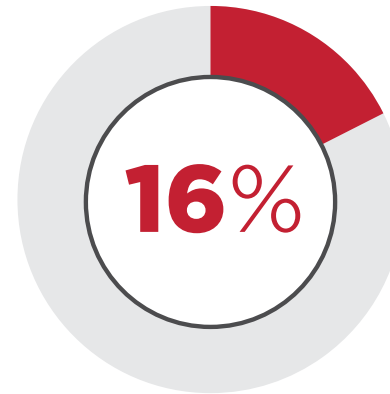
Flavored, sweetened options provide a gateway

Emerging Opportunities in Plant-Based: Non-Dairy Ice Cream



Non-dairy ice cream

- Is already familiar via formats like sorbet that are perceived as “better-for-you”
- A “permissible indulgence” option for those who want to avoid dairy but still have a treat



of consumers
**have purchased
non-dairy ice cream**



How manufacturers will win:

- Creating products that deliver *authentic dairy taste in a wide range of flavors*

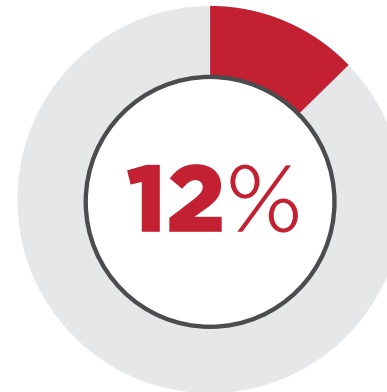
Emerging Opportunities in Plant-Based: Non-Dairy Yogurt



Non-dairy yogurt

Purchasers are finding flavors they like...

But those with a preference for specific textures (like Greek) are disappointed



of consumers
**have purchased
non-dairy yogurt**



How manufacturers will win:

- Delivering **authentic taste**
- Creating **smooth, indulgent and creamy textures** found in dairy

Emerging Opportunities in Plant-Based: Cheese



CONSUMER PERCEPTION

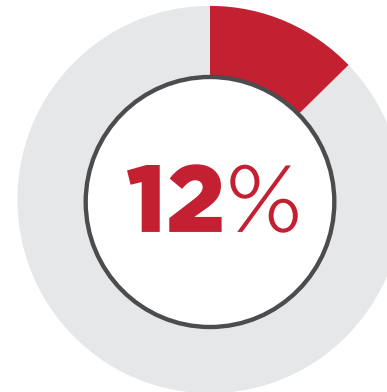
Plant-based cheese: "Not there yet."

Issues with taste and texture have consumers limiting exploration of this category

Non-dairy cheese

Faces bigger adoption challenges...

Replicating the rich flavor, texture, and melting properties of cheese is a high bar



of consumers
**have purchased
non-dairy cheese**



How manufacturers will win:

- Delivering **rich, authentic dairy cheese taste**
- Delivering the **texture and melting properties** found in regular cheese

Key Differences: Plant-Based Purchasers vs. Non-Purchasers



Plant-Based
PURCHASERS

Value functionality

- Skew younger (Millennials), more diverse, more trend-forward, higher incomes
- More likely to look for **quality, health, and sustainability cues** when shopping
- More likely to have acquired a taste for plant-based options

VS



NON-PURCHASERS

Value taste

- Tend to be older (Baby Boomers)
- Not swayed by health claims, considerably more skeptical & pessimistic about the consumption experience
- Feel plant-based options are significantly **lacking in flavor, creaminess and mouthfeel**
- Want plant-based options to taste like **“the real thing”**



KEY INSIGHT

Non-purchasers are definitely open to plant-based products!

There's a huge opportunity to reach them with options that taste like dairy and with new, indulgent flavors

How Manufacturers Must Appeal to Each Audience

Neutralize
flavors



Plant-Based Purchasers
**who are more used to
plant-based taste:**

Manufacturers need to focus on
neutralizing flavor, to let the natural
plant-based taste come through

AND

Mask
off-notes
& improve
mouthfeel



Non-Purchasers
**who more strongly
crave “real dairy flavor”:**

Manufacturers need to focus
on **masking off-notes** and
improving mouthfeel

Creating the In-Demand Flavors of Plant-Based Dairy

Elong helps you achieve your development goals by delivering on the taste & functionality expectations of consumers



Reinventing Authenticity

We boost and improve taste to meet regional and global preferences



Reinventing Dairy

We deliver authentic dairy taste even in non-dairy applications



Reinventing Delicious

We mask off-notes and improve mouthfeel



Reinventing What's Possible

We improve functionality—improving temperature stability and formula consistency while lowering cost-in-use—while reducing sugar, salt, fat and calories



Ready to learn more?

Contact us today to see how we can help you reinvent the authentic taste of dairy in dairy-free applications.

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