



THE LATEST I2S BRIEF: HEALTH & NUTRITION™



DECIPHERING DEMAND FOR PLANT-BASED DAIRY FOODS AND BEVERAGES

The plant-based market is growing around the world. But do you know what's driving growth? Who are your consumers? What are they looking for? Read the latest research findings to find out.

Ingredient

idea labs®

IDEAS TO SOLUTIONS





PUT YOUR PLANT-BASED OFFERINGS INTO A CATEGORY BY ITSELF

Consumers have complex reasons for choosing plant-based foods and beverages — and they expect a lot from them. Learn what's really driving demand, and how to deliver products that even the most discerning consumers will love.


HEALTH & NUTRITION™

Ingredient
idea labs® 
IDEAS TO SOLUTIONS

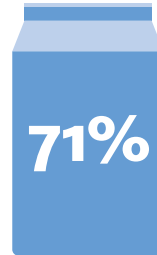
CAREFUL CHOICES AND THE HEALTH HALO

In July 2016, Ingredion conducted focus group sessions with consumers in the U.S. and Canada who are frequent purchasers of plant-based foods and beverages. All quotes come from those focus groups.

ANALYZING LABELS IS THE NEW NORMAL

People everywhere are reading labels to make more informed purchasing decisions. In fact, U.S. consumers are reading ingredient labels more often than not.

Ingredient lists and label claims are growing ever more crucial to market success.



71% OF U.S. CONSUMERS USUALLY OR ALWAYS READ CLAIMS OR DESCRIPTIONS ON THE BACK OR SIDE OF THE PACKAGE¹

WHEN NEGATIVES ARE A POSITIVE

Plant-based foods and beverage consumers are no exception — they read labels carefully, looking to avoid long lists of unfamiliar or undesirable ingredients.

“The fewer ingredients the better”

“I avoid added sugar”

“I avoid anything I can’t pronounce”

“I really do prefer less preservatives”



When it comes to plant-based foods and beverages, consumers often focus on what these products do not contain — what’s absent from a label is as important as what’s included.



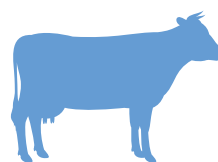
SEEKING THE HEALTH HALO

Consumers report turning to plant-based products for health reasons.



“I switched to help my **digestive health improve** and it worked great”

“I think alternative dairy is **healthier**”



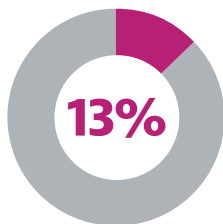
“The **hormones** in cow’s milk first drove me to try alternative dairy”

Consumers say plant-based foods and beverages add nutrition to their diets, and they view these products as healthier alternatives to traditional dairy.

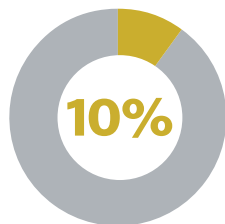
COMPLEX MOTIVATIONS THAT CROSS TRENDS

THE INTERSECTION OF NUTRITION AND CLEAN LABELS

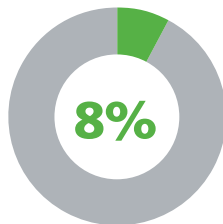
Manufacturers are responding to demand for plant-based foods and beverages that align with the CLEAN & SIMPLE trend. New product launches in the category during 2018 featured the following claims:²



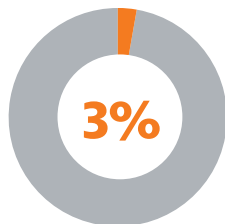
low/no/reduced allergens



gluten-free



non-GMO



organic

Demand for healthier products overlaps with demand for clean label products that are free from additives and artificial ingredients. In consumers' eyes, the presence of these elements contradicts the reasons they prefer plant-based foods and beverages in the first place.

ETHICAL AND ECOLOGICAL CONCERNS DRIVE PURCHASE

Consumers often choose plant-based foods and beverages for what they view as ethical and sustainability reasons.



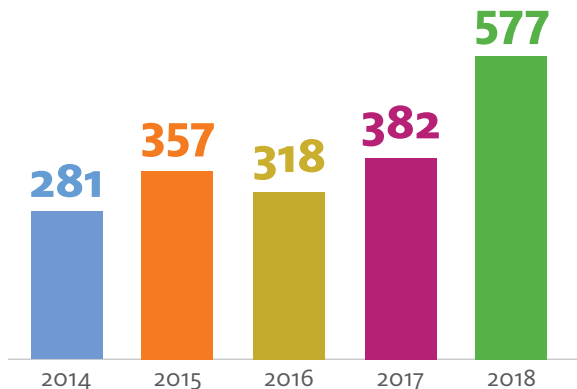
Sustainability joins clean labels and the health halo as an overlapping motivator of plant-based foods and beverage consumption.



RISING DEMAND; RISING OPPORTUNITY

A MARKET ON THE UPSWING

New product launches for plant-based foods and beverages have steadily increased over the past five years.²



Plant-based foods and beverages present a huge opportunity for food and beverage manufacturers.

THE POPULAR PULSE

Products made with pulse ingredients have skyrocketed in popularity. Pulses are the dried seeds of the legume family.²

220%

increase from 2015 to 2018 in new product launches that use pulse ingredients for the plant-based food and beverage space in U.S. and Canada²

Purchasers of plant-based dairy alternatives in particular have very strong perceptions of pulse ingredients, both for nutrition and sustainability reasons.



Pulses offer many of the benefits that consumers are seeking from plant-based foods and beverages — a similarly expanding market.

ROOM TO IMPROVE THE EATING EXPERIENCE

With demand for plant-based foods and beverages rising, the texture and taste of those products leave something to be desired compared to regular dairy.

“THEY LACK [FLAVOR] DEPTH AND CREAMINESS COMPARED TO MY EXPECTATIONS”

“SOMETIMES PLANT MILKS ARE TOO WATERY”

“IT’S IMPORTANT FOR THE PRODUCT TO BE FRESH AND CREAMY WITHOUT BEING WATERED DOWN”

“THE ALTERNATIVE CHEESE IS TOO CHEWY; SOME OF THE PRODUCTS HAVE A LOT OF FILLERS IN THEM AS WELL, ESPECIALLY THE CHEESE”

Manufacturers have an opportunity to formulate plant-based foods and beverages that deliver preferred sensory experiences.

THE BOTTOM LINE

Consumers who regularly choose plant-based foods and beverages are intentional — not impulse — buyers. They place higher importance on perceived health benefits and the origins of what they consume. A clean label is expected in this segment, but there is a texture and flavor “gap” that consumers would like to see closed. **Getting the sensory aspects right without compromising nutrition and label expectations will help manufacturers differentiate themselves and win with these discerning consumers.**

Sources:

Unless otherwise noted, all data in this brief come from Ingredient proprietary research conducted in July 2016.

1. Ingredient Proprietary Consumer Research, Atlas, 2019

2. Innova database, September 2019

DELIGHT WITH PLANT-BASED FOODS AND BEVERAGES THAT SATISFY DEMAND

When it comes to plant-based foods and beverages, consumers have high expectations — from nutritional benefits and clean labels to tastes and textures as indulgent as those of traditional dairy. When you work with Ingredion, you can deliver what consumers really want.

Choose from our broad range of plant-based ingredients from diverse raw materials, including pulses, corn, potato, tapioca, rice and sago. Explore our flours, plant-based proteins, prebiotic fibers, stevia sweeteners, and fruit and vegetable concentrates.

Deliver enhanced **HEALTH & NUTRITION**:

- **VITESSENCE® Pulse 1803** organic pea protein isolate, a high performance isolate that can help you create products with claims consumers want: “excellence source of protein” “USDA organic” and “free from”.

Address the **CLEAN & SIMPLE** trend:

- Get good process tolerance and cold stability with a creamier mouthfeel for products like yogurts and puddings with **homecraft® Create 315** multi-functional tapioca flour and label it simply “tapioca flour”.
- Achieve good process tolerance stability in light-colored applications with delicate flavors such as in ice creams, yogurts and puddings with **NOVATION® Lumina 300** functional native starch.
- Explore a broad portfolio of non-GMO and organic ingredients.

Get started on a new **HEALTH & NUTRITION** project today.
[ingredion.us/alternativedairy](https://www.ingredion.us/alternativedairy) | 1-800-713-0208

Ingredion
idea labs 
 IDEAS TO SOLUTIONS

Create **SENSORY EXPERIENCE** with creamier texture and superior functionality:

- **PRECISA® 604** is a modified potato starch that delivers superior gelling and melting properties. It is ideal for vegan cheese applications where shredding, slicing and melting properties are required.
- **TICALOID® 620** is a synergistic combination of gums that thickens at low usage levels and provides an elastic gel at higher concentrations. It is used for suspension in beverages and elasticity in shreds and slices.
- **GUMplete™ GELLAN B** provides suspension and improves mouthfeel.



Whatever your application, you can solve your product formulation challenges through our deep formulation expertise. Unlock the best of global flavor and texture trends in plant-based foods and beverages with our **CULINOLOGY®** capabilities.


Ingredion®