

The Growing Appeal of Dairy Alternatives



Concerns impacting dairy perceptions globally



Lactose Intolerance



Allergens



Perceived Unhealthfulness



Animal Product Avoidance

Contributing to a **22% decline in U.S. fluid milk consumption** from 2000-16¹

A new generation of plant-based milks



In refrigerated case, like traditional dairy



Beyond soy: nuts, legumes, seeds, grains, pulses

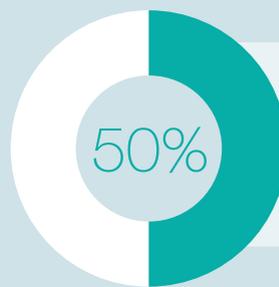


Nutrition: protein, Omega-3's, calcium, Vitamin D



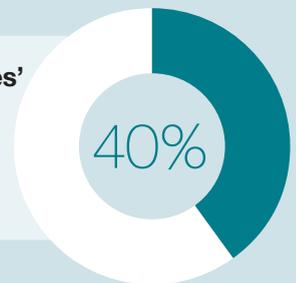
Choices: plant-based milks, cheeses, yogurts, and frozen desserts

Gaining mainstream appeal in the U.S.



About 50% of U.S. consumers buy both dairy and dairy alternatives²

40% Dairy alternatives' predicted share of total U.S. dairy market by 2021³



Perceived health halo may set a higher standard⁴



45% expect the same experience as traditional dairy



Higher label scrutiny for sugar, protein, fat and other ingredients than traditional dairy



Greater purchase influence from ingredients' healthfulness, quality

Plant-based dairy alternatives: Formulation considerations

- ✓ **Texture differences**
- ✓ **Nutrient content**
- ✓ **Sugar reduction**



Partner with Cargill and leverage our specialty sweetness and texture ingredient portfolio to bring consumer-pleasing dairy alternatives to market. Contact us at 1-877-SOL-UTNS (765-8867),

¹ Packaged Facts, Dairy and Dairy Alternative Beverage Trends in the U.S., 2017

² Cargill proprietary research, "The Shifting Global Dairy Market"

³ Ibid, Packaged Facts

⁴ Ibid, Cargill proprietary research