The growing appeal of alternatives to dairy

Main drivers of consumption for dairy alternatives in Europe[1]

67%	35%	28%
Health in general	Digestive/stomach irritation avoidance	Help strengthen immunity

The dairy alternatives European consumer profile[1]

	Likely to check nutritional indicator	Top 3: Importance in purchase decision	Agree: plant-based foods are healthier	Indicate plant-based has an advantage
40% LIGHT USERS	69%	Total sugar 66%; Source of plant 63%; Animal welfare 62%	46%	Total calories 30%; Nutritional value 26%; Contains healthy ingredients 30%
36% MEDIUM USERS	82%	Nutritional value 73%; Source of plant 73%; Animal welfare 73%	60%	Total calories 35%; Nutritional value 35%; Contains healthy ingredients 33%
24% HEAVY USERS	70%	Source of plant 81%; Animal welfare 72%; Total sugar 65%; Environmentally sustainable 65%	46%	Total calories 57%; Nutritional value 55%; Contains healthy ingredients 54%

More than 2 in 5 European consumers are very/extremely likely to **pay a higher price for products fortified with protein.**[1]

Plant-based dairy alternatives with a protein claim in European product launches[2]

2019	2020	2021
26%	27%	33%

High sources of protein

Protein claims made in % of launches by Dairy alternatives subcategory 2021[2]

Flavored milks	24%
Dairy alternative drinks	21%
Yogurt*	17%
Cheese (fresh & cream)	15%
Dairy desserts	15%
Unflavored milk	12%
Dairy cheese*	

* Yogurt = spoonable dairy yogurt, spoonable non-dairy yogurt, drinking yogurt
Dairy desserts = ambient desserts, chilled desserts, soft cheese desserts

Fastest growing plant protein used in plant-based dairy alternatives between 2020 and 2021[2]

1. Pea protein
2. Potato protein
3. Fava bean protein

The fastest growing subcategory launches containing pea protein[2]

- Non dairy ice creams & frozen yogurt
- Spoonable non dairy yogurt
- Plant-based dairy drinks
- Non dairy cheese

Learn more at www.cargill.com/food-beverage/emea/plant-proteins

[1] Cargill proprietary research Europe, 2022
[2] Innova database, 2021

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