

Expert insights:

The cream of the crop

Inside our solutions for cooking, whipping & beyond.



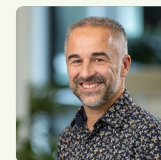
Creams – whether for cooking or whipping – may be one of the most mature categories in dairy, but that doesn't make them simple. Behind their apparent familiarity lies a constant balancing act between cost pressure, process robustness, sensory performance and evolving expectations around label-friendliness and sustainability.

To explore where the real opportunities lie, we spoke with four Cargill experts who work at the intersection of market strategy, R&D and functional systems. Together, they share how dairy and imitation creams are evolving – and how plant-based and performant solutions can help manufacturers move forward without compromise.

Our experts:



Sandy Van Espen
Commercial Marketing
Director Dairy & Fruit



Stephane Mauduit
R&D Senior Technical
Account Management Dairy
& Dairy Alternatives



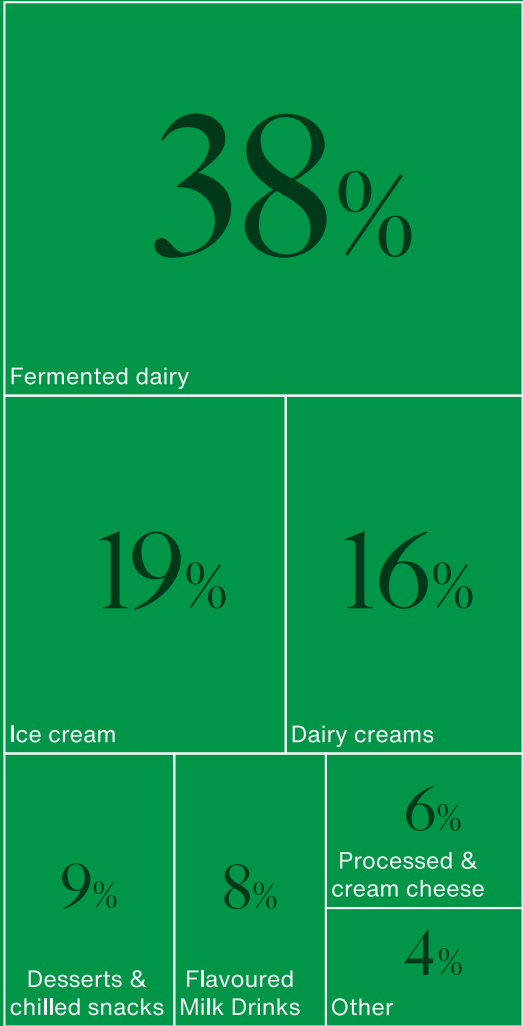
Marthe Emereau
R&D Application Specialist
Dairy & Dairy Alternatives



Delphine Savereux
Solutions Director,
Functional Systems



‘Addressable’ dairy market Europe, 2025



Sandy, let’s start with the big picture. What’s happening in the cream market today?

Sandy Van Espen: For Cargill, creams are the third-largest addressable dairy subcategory after yogurt, representing roughly three million tons in Europe.* Growth is modest – around 0.8% CAGR – which is broadly in line with the overall dairy market. That tells you two things: it’s a sizeable category, and it’s a very mature one.

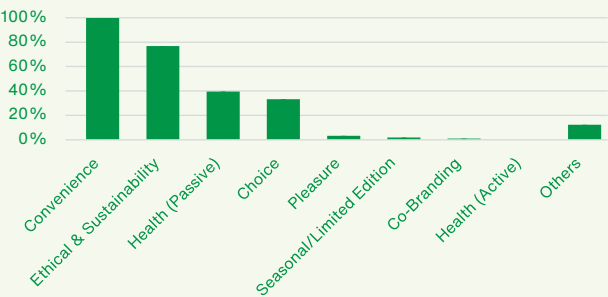
Private label plays a dominant role, accounting for around 40% of value share in Europe. That shapes the entire category – creams are highly functional products, and competition is intense. Most packs communicate usage first: culinary, whipping, sour and fat level. There’s very little emotional branding compared to other dairy segments.

From an innovation perspective, the category is relatively quiet. Over the past three to five years, most new activity has come from plant-based creams, hybrid concepts, and products positioned around simpler, more label-friendly formulations**. But overall, it’s not a fast-moving innovation space. That does not mean that there’s no need for formulation work, however.

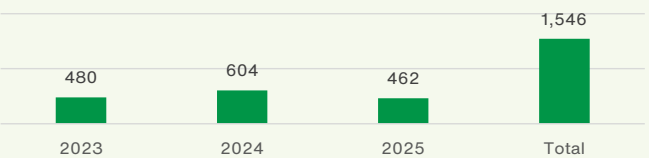
Do we see different dynamics between cooking creams and whipping creams?

Sandy: Yes, very much so. Cooking and whipping creams might seem similar, but the technical requirements are completely different. Cooking creams allow for more flexibility – particularly around fat reduction and functional optimization. Whipping creams, on the other hand, are far more constrained because fat plays such a critical structural role. That difference really determines where and how innovation happens.

Incidence of positioning claims in 2025



Creams number of product launches



* Addressable dairy market excludes milk, plain yoghurt, plain fromage frais & quark, hard & soft cheese and butter & spreads.
** Innova Market Insights new product data, 2023-25



Stephane, you work closely with customers in France. How would you describe that market, and what are the main challenges you're working on with them ?

Stephane Mauduit: France is one of the most mature and tradition-driven cream markets in Europe, and with a much more regulatorily restrictive aspect when compared to other regions. That creates a very specific set of challenges.

- 1 First, there is a strong **culinary heritage** and very high expectations. Cream is closely associated with authenticity, indulgence and technical performance – whether that's (sauce) stability, mouthfeel or resistance during cooking. Any formulation change is quickly noticed, especially in UHT cooking creams and foodservice references. This leaves very little room for technical compromise.
- 2 Second, there is intense **cost pressure**. Private label is highly dominant in France, which pushes manufacturers to optimize formulations aggressively. At the same time, consumers still expect premium sensory quality. The challenge for our customers is to reduce cost without

degrading taste, texture or the overall product image – a difficult balance in such a mature category.

- 3 Finally, **ingredient sensitivity** is particularly high in France. Short ingredient lists and improved label-friendliness are key expectations. Manufacturers are under pressure to avoid certain ingredients – such as cellulose derivatives– while still delivering the same level of performance. That combination of culinary expectations, cost optimization and label sensitivity defines much of the work we do with French customers today.

Do you see a real trend toward fat reduction in France?

Stephane: Yes – but very selectively. High-fat creams, especially in the 30–35% fat range, remain dominant for cooking applications and are, of course, essential for whipping creams. That hasn't changed.

What we do see growing is the segment of light creams between 12-18% fat, driven by two very different motivations: **In retail**, this is mainly linked to health-conscious households. **In foodservice**, it's primarily about cost control – and today, 18% fat has become the standard for cooking creams in many professional kitchens.



“Across Europe, manufacturers are balancing fat reduction, stability under heat and acidity, shelf life, cost, and evolving labeling expectations. And there's no one size fits all solution – what works for full fat whipping cream won't work for a reduced fat culinary application.

In a category shaped by tight margins and high expectations, small formulation choices can make a big difference.”



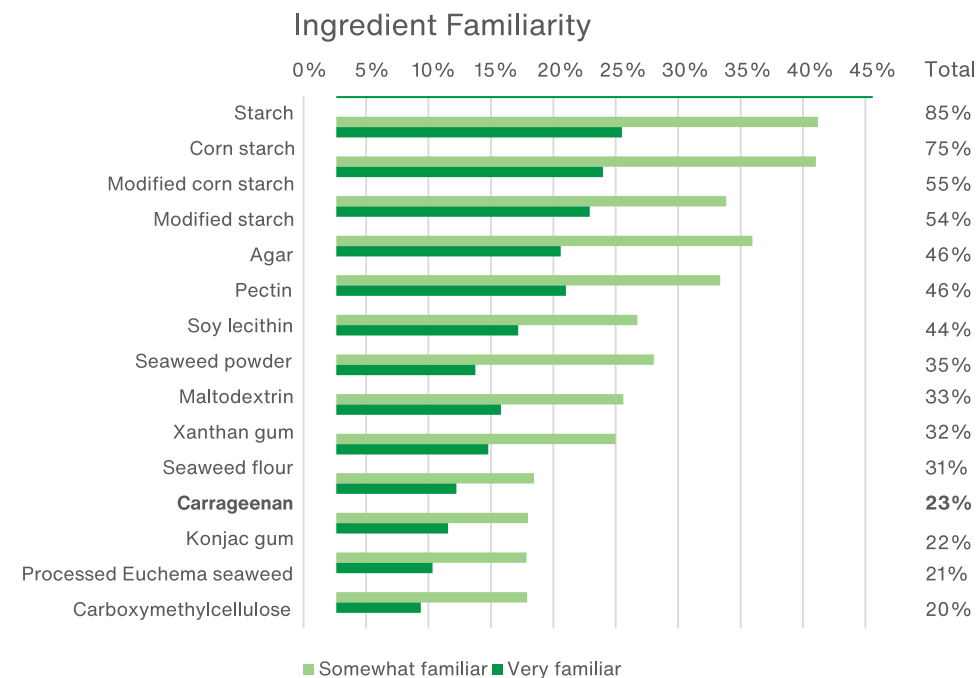
However, low fat creams are only accepted if texture and cooking robustness remain intact. If performance drops, the product simply won't succeed in France. That's why **stabilization systems** are so critical in this market – they allow manufacturers to reduce fat without compromising functionality or culinary performance.

Label friendliness is often mentioned in this category. How does that play out in reality?

Stephane: It's a bit of a paradox. Many customers want simpler, more familiar ingredient lists. But when you try to replace highly functional ingredients, especially in high-fat or whipping creams, it quickly becomes technically complex and often more expensive.

Take carrageenan replacement in whipping cream as an example. For long shelf-life products above 30% fat, this ingredient remains extremely difficult to replace. Carrageenan provides unmatched stability and shape retention over time. Alternatives like agar or pectin can work in some cases, but they require very precise formulation and process control.

So, while there is demand for more label-friendly solutions, carrageenan is still the workhorse of the category. The challenge is knowing when alternatives make sense – and when they don't.



Source: IngredienTracker, 2024, Europe, 3000+ consumers

Marthe, from an R&D perspective, where do you see real opportunities to innovate in such a mature market?

Marthe Emereau: The biggest opportunity lies in customization. There is no single “magic” solution for creams. Every product depends on the customer’s process, target texture, fat level, shelf-life, labeling requirements, and cost constraints.

What we can do is replicate customer processes at pilot scale and tailor solutions specifically to their conditions. For example, we might take a formulation that works well in one region and adapt it to another where pre-heating temperatures are higher or processing is more aggressive.

In some cases, that means selecting a different type of starch. In others, it means reducing or even removing starch entirely and replacing it with hydrocolloids that are more process-resistant. This kind of fine-tuning is where a lot of value is created as we can replicate these conditions in our plant and understand how the texture and functionality will play out.

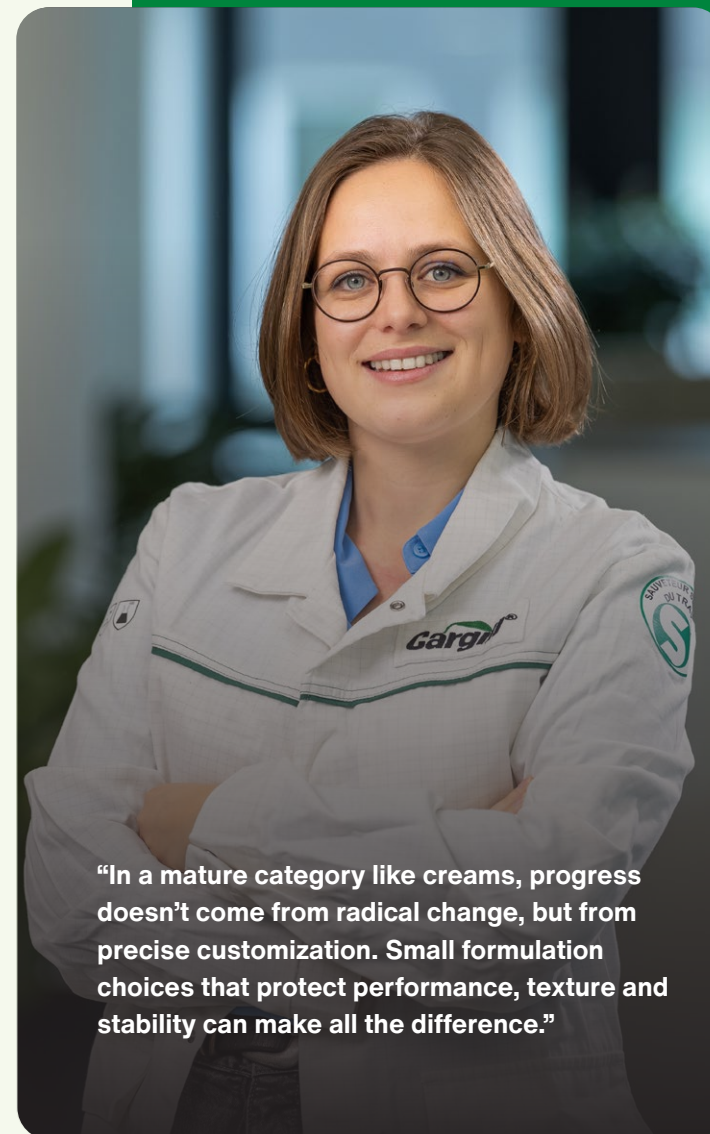
Can you give a concrete example?

Marthe: In culinary creams, we often see issues when high temperatures destroy starch functionality before UHT treatment. One solution is to use more robust, modified starches. Another is to design starch-free systems using hydrocolloids, which removes that vulnerability altogether.

From a market perspective, this can also support label-friendly positioning, depending on the region and regulatory context. But again, it’s always about finding the right balance between technical performance and market expectations.

What about whipping creams and cost-effective or imitation concepts?

Marthe: Here, fats become one of the key levers: Milk fat can technically be fully replaced by vegetable fats – palm, coconut, or tailored blends – but whipping performance depends heavily on the fat profile and the stabilizer system. Liquid oils with added nutritional value can be used for cooking cream analogues applications.



“In a mature category like creams, progress doesn’t come from radical change, but from precise customization. Small formulation choices that protect performance, texture and stability can make all the difference.”

To recreate whippability, you need enough saturated fatty acids in the fat component and the right stabilizers to mimick the natural fat globule membrane found in dairy cream. Stabilizing the water phase is something we can do very well thanks to our broad portfolio. Where we are developing our knowledge still is on the whippability and the emulsification which plays such a central role. So, while it is possible, it requires careful design and realistic expectations.

Delphine, stepping back, what is the added value of functional systems versus single ingredients in cream applications?

Delphine Savereux: Functional systems bring robustness, speed and risk reduction.

From a customer perspective, a system may appear more expensive than a single ingredient, but in reality it can often help to reduce total cost. Customers save R&D time, simplify operations by handling fewer ingredients, and significantly reduce food safety and regulatory risks.

Regulation in Europe is constantly evolving, especially for hydrocolloids and stabilizers. Take Commission Regulation (EU) 2026/196, which enters force on

August 18, 2026, for example, and which amends EU food additive legislation. It revises the use and specifications of several hydrocolloid additives, including xanthan gum and pectin.

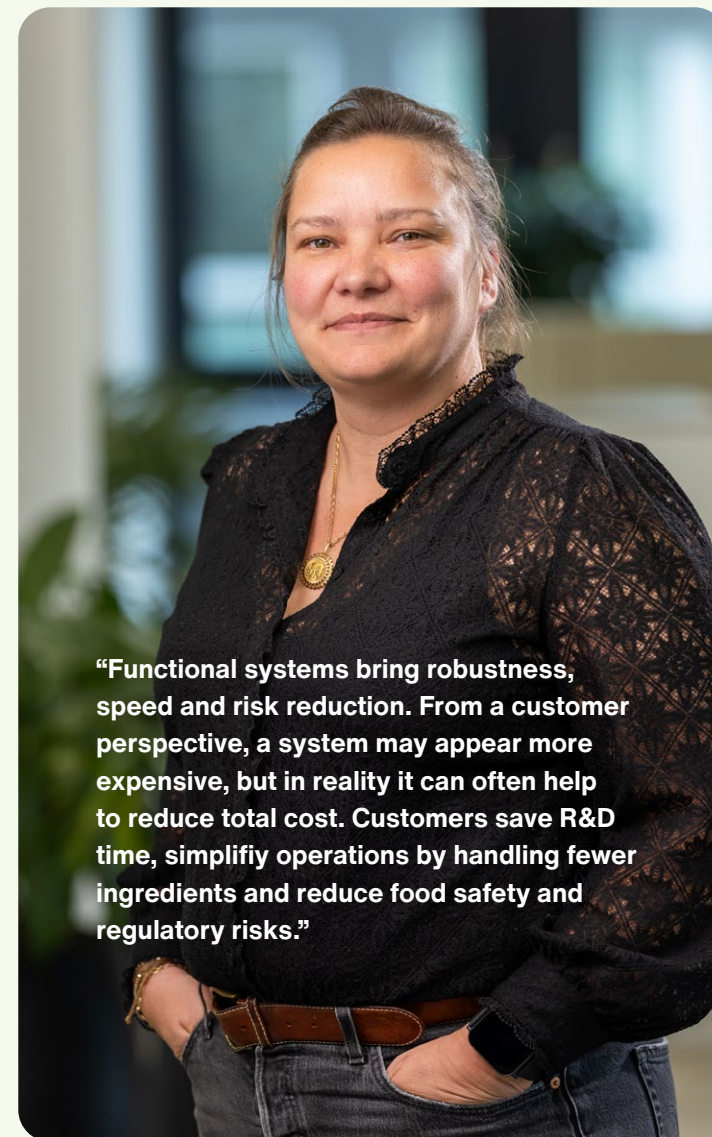
Many smaller- to medium-sized customers simply don't have the resources to stay on track of every change. When they opt for a functional system, we take on that complexity for them.

Another example is that our functional systems can be designed for higher robustness, enabling these systems to help compensate for protein variability.

How do functional systems support cost pressure specifically?

Delphine: Cost pressure is probably the number one trend in creams today. Functional systems allow manufacturers to reduce fat – often the most expensive component – while maintaining texture, mouthfeel and cooking stability.

When you remove fat, you need to compensate intelligently. That's where hydrocolloids and stabilizer systems play a crucial role. The goal is not just to reduce



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cost, but to do so without compromising sensory quality. To increase our efforts here, we are currently having an intern who is supporting more work on recipes and various blends development.

And label friendliness?

Delphine: That's the second major trend. Customers want simpler ingredient lists, but not at the expense of performance. Functional systems allow us to combine ingredients in a way that delivers both functionality and a more consumer-acceptable label, depending on the market.

It's also worth noting that we can integrate both Cargill and selected external ingredients when needed. What matters is not the origin, but the performance, safety and regulatory compliance of the final solution.

Stephane, fermented creams are often overlooked. Why are they important?

Stephane: Fermented creams – such as crème fraîche or sour cream – are particularly important in markets like France and parts of Eastern Europe. Technically, they present specific challenges. When fat is reduced, you need to rebuild texture and protect proteins in an

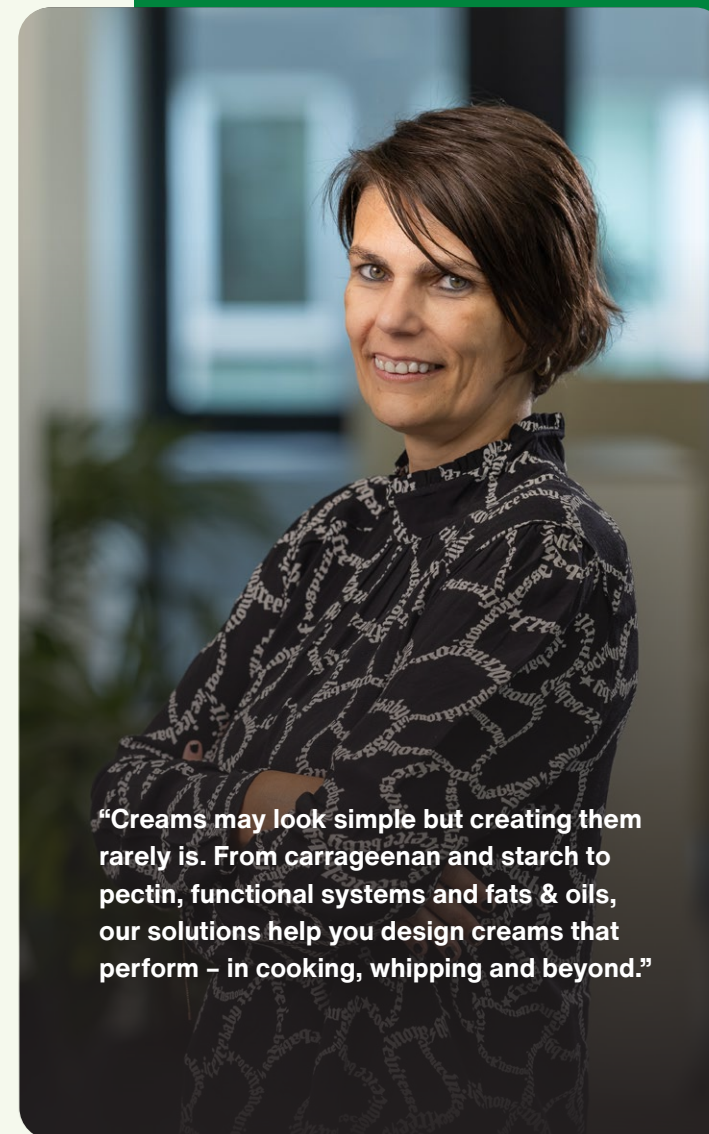
acidic environment, especially during cooking. Without the right system, you can get protein precipitation, graininess or loss of stability.

Functional systems help recover the texture of full-fat products and ensure consistent cooking performance, even with lower fat levels or process variation.

Finally, Sandy, what does all of this mean for customers developing new cream products?

Sandy: It comes down to understanding the full picture: the manufacturing process, the performance expectations, the cost targets and the labeling goals. Our teams start by seeing whether an existing solution can be a good starting point. From there, our experts work closely with customers to fine-tune and adapt formulations, using pilot capabilities to replicate real-world conditions.

The real strength lies in combining deep application expertise with a broad portfolio – including various texturizers, functional systems and fats and oils, and even external ingredients where they make sense. That allows us to help customers move forward in a category where small improvements can make a big difference.



“Creams may look simple but creating them rarely is. From carrageenan and starch to pectin, functional systems and fats & oils, our solutions help you design creams that perform – in cooking, whipping and beyond.”

Your partner to deliver “dairy joy for everyone!”

Our team of passionate experts are excited to explore co-creation opportunities with you. Any questions?

Reach out to us today and let's deliver “dairy joy for everyone!” together.



Sandy Van Espen, Commercial Marketing Director Dairy & Fruit

With 25 years of experience in marketing, consumer research and innovation, Sandy is currently leading the commercial marketing efforts for Dairy & Fruit categories in Europe. In this role, Sandy is focused on understanding consumer & market dynamics, positioning Cargill as the preferred supplier for dairy customers and building out thought leadership in Europe.



Marthe Emereau, R&D Application Specialist Dairy & Dairy Alternatives

Marthe Emereau is an R&D Application Specialist in dairy and dairy alternatives, with hands-on experience in the development of dairy creams and imitation cream solutions. She collaborates closely with cross-functional teams and partners to translate technical innovation into application-driven, market-ready concepts aligned with customer and industry needs.



Delphine Savereux, Solutions Director – Functional Systems

Delphine Savereux is Solutions Director for Functional Systems, leading the product strategy and roadmap across Europe. Working at the intersection of commercial, R&D and operational teams, she translates strategic objectives into concrete, scalable solutions. With over 20 years' experience in the food industry, spanning business and new product development functions, she is driven by building pragmatic solutions that create real value for customers and teams.



Stéphane Mauduit, R&D Senior Technical Account Manager

With 30 years' experience in the specialty food industry, Stéphane Mauduit is currently Advisor, R&D Senior Technical Account Manager for Dairy & Dairy Alternatives in Europe, focused providing value added solutions in the dairy and dairy alternatives industry. His role involves driving growth through innovative product solutions, managing projects, and building strong customer relationships. Stéphane has a broad range of experience especially around hydrocolloids and starches for dairy applications across various functions including product development, application development and delivering technical solutions to customers.

More information: cargill.com/food-beverage/emea/dairy/dairy-creams