



An alternative approach to sensory success

Consumer Journey of Emotions
About Meat & Dairy alternatives

Presenting...



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Anne Berends leads the (UX/PX) Consumer Product Experience & Sensory Science capabilities within Cargill. Before joining Cargill, she acquired vast experiences in multiple industries and worked in human nutrition behavior, food quality, sensory & consumer science, in various countries and around the globe.



“I love my family, **farming, good food & good wine;** lived in 5 countries and am a proud owner of 1 cat, 3 horses, 2 cows & 10 chicken”

How to bring *Sensory delight for Alternatives', success*

- 01 Cargill at a glance
- 02 Consumers' choice: a journey of emotions
- 03 What consumers want in taste and texture
- 04 Prototypes to feed your 'alternative' appetite

We source raw materials, make and deliver products that are vital for living.

Food solutions EMEA



8K
employees



88
locations in 29
countries



51
plants



Delivering meat & dairy alternative solutions to make them a natural choice for consumers



*Developing more
Responsible Solutions*



*Being
Value Conscious*



*Contributing Health &
Nutrition Improvement*



*Delivering
Sensory Delight*



Texturizers



Plant-based proteins & fibers

We offer...
everything for enticing and
nutritious solutions!



Cocoa & chocolate



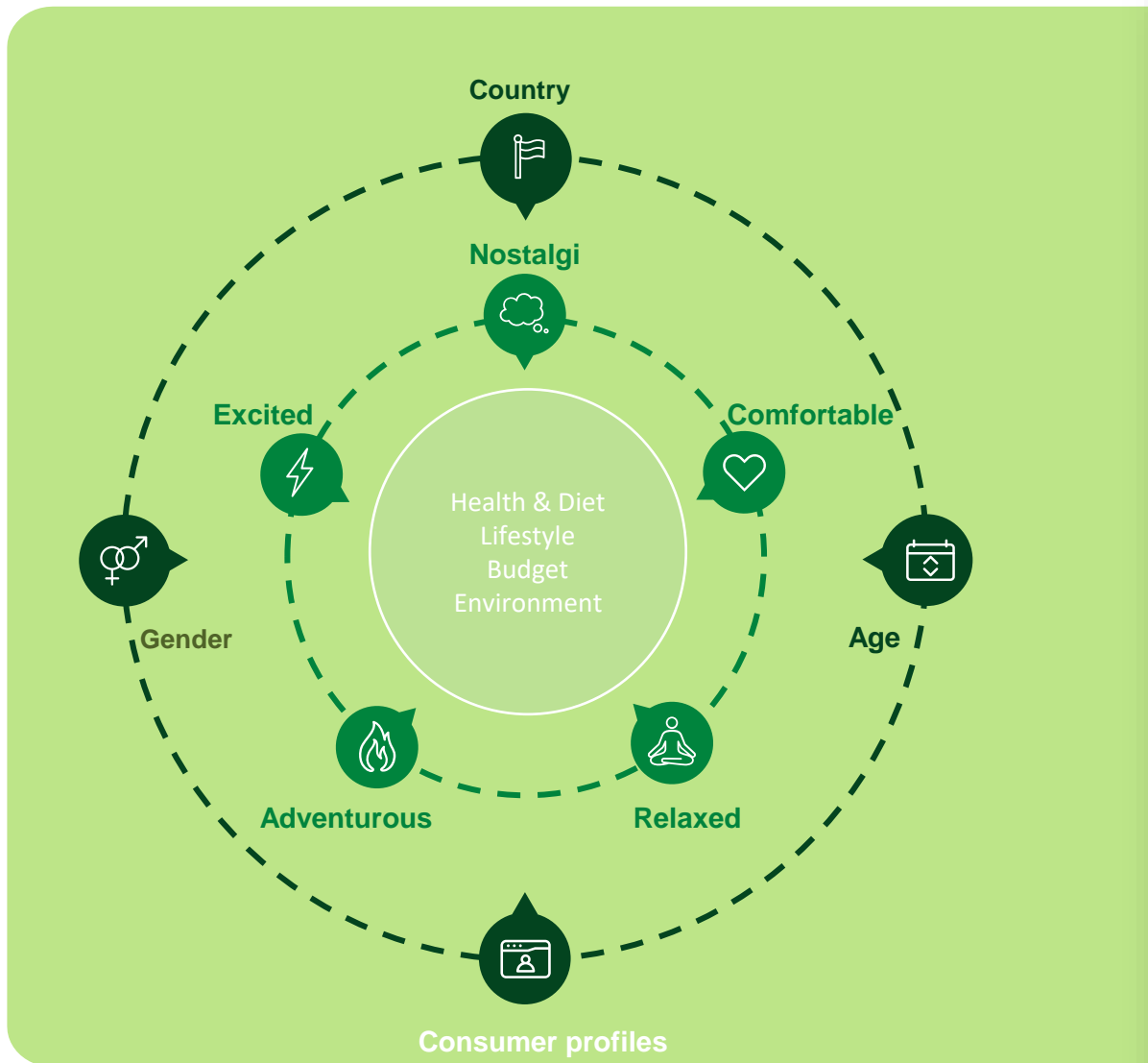
Sweeteners



Fats & oils

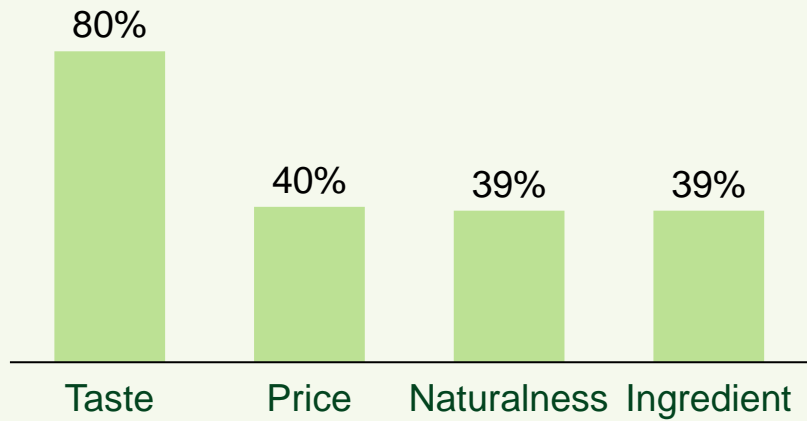


+ a blend of various
insights & capabilities



Sources: Innova Consumer Genius, FR, DE, ES, UK, 2024

What matters?



80%*

of consumers
repurchase a
product because
of its sensory
appeal (smell,
flavor, texture)

Source: *Cargill™ HEARTBEAT: *1,160 consumers from Dairy Alt, Meat Alt from ~ 11,500 consumers (Categories - Chocolate confectionary, Bakery, Ice Cream, Dairy Alt, Meat Alt)





Journey of emotions

Consumers **express their feelings** about food emotionally and **subjectively**.

In Sensory & Consumer Science, we bridge the gap between subjective consumer terms and objective product characterizations to uncover the true meaning of concepts like **INDULGENCE** and how we can enhance it in our products.

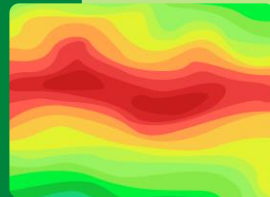
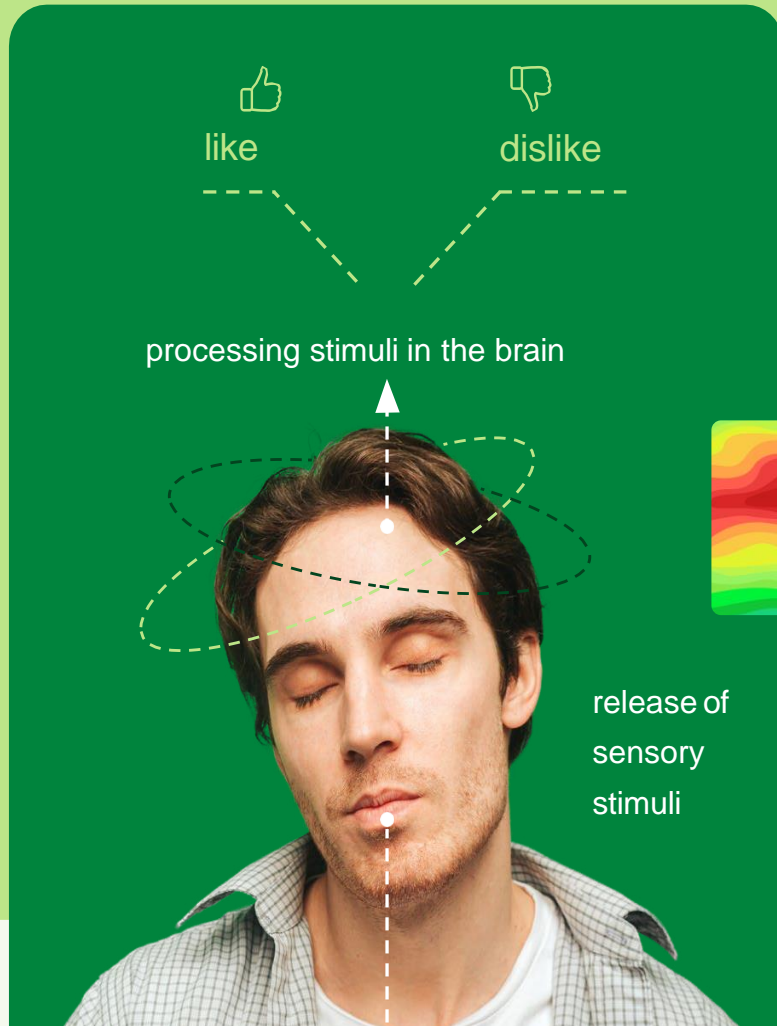
creamy



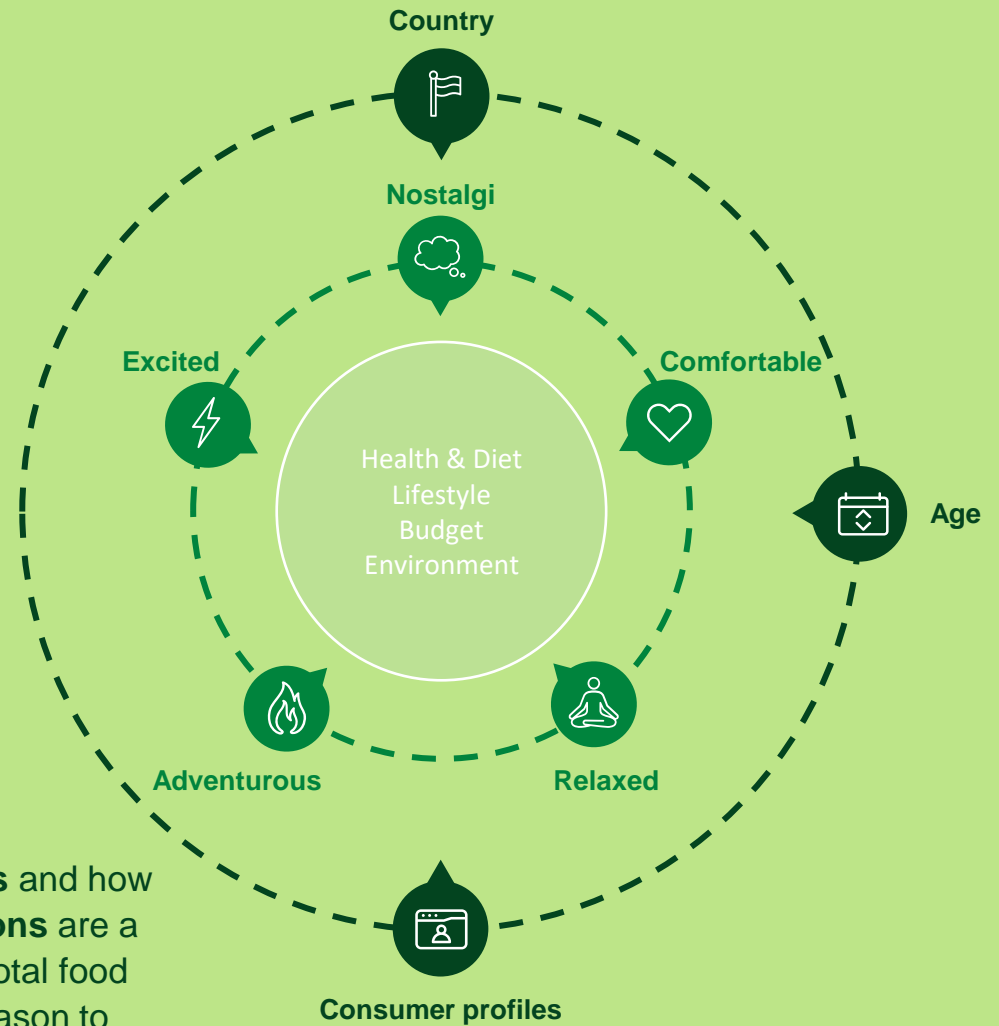
happy moments

childhood

What consumers want in Taste & Texture...



Personal attitudes and how we express **emotions** are a critical part of the total food **perception** and reason to **purchase** or not.



“Close/Like Real Meat” ?

Consumers say:
A **Meat substitute** should...

58%

Taste good

71%

Have the same texture

... like an animal protein.



SEGMENT 1



Dense texture



Proportion : 38%



SEGMENT 2



Chicken flavour



Proportion : 24%



SEGMENT 3



Intense flavour



Proportion : 22%



SEGMENT 4



Soft texture



Proportion : 15%

Mediterranean Mycobites

Innovative, protein-packed alternative to pasta



Love at first bite

Sensory product preferences differ per segment

Susan



Dense Texture



Proportion : 38%

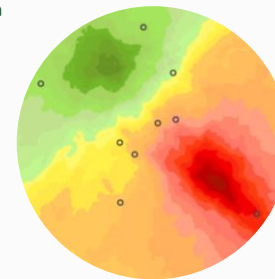
Formulation

N=200 consumers

Region of high preference



Region of low preference



PLS Map regressing likings on sensory attributes driving liking

Attitudes & Behaviours

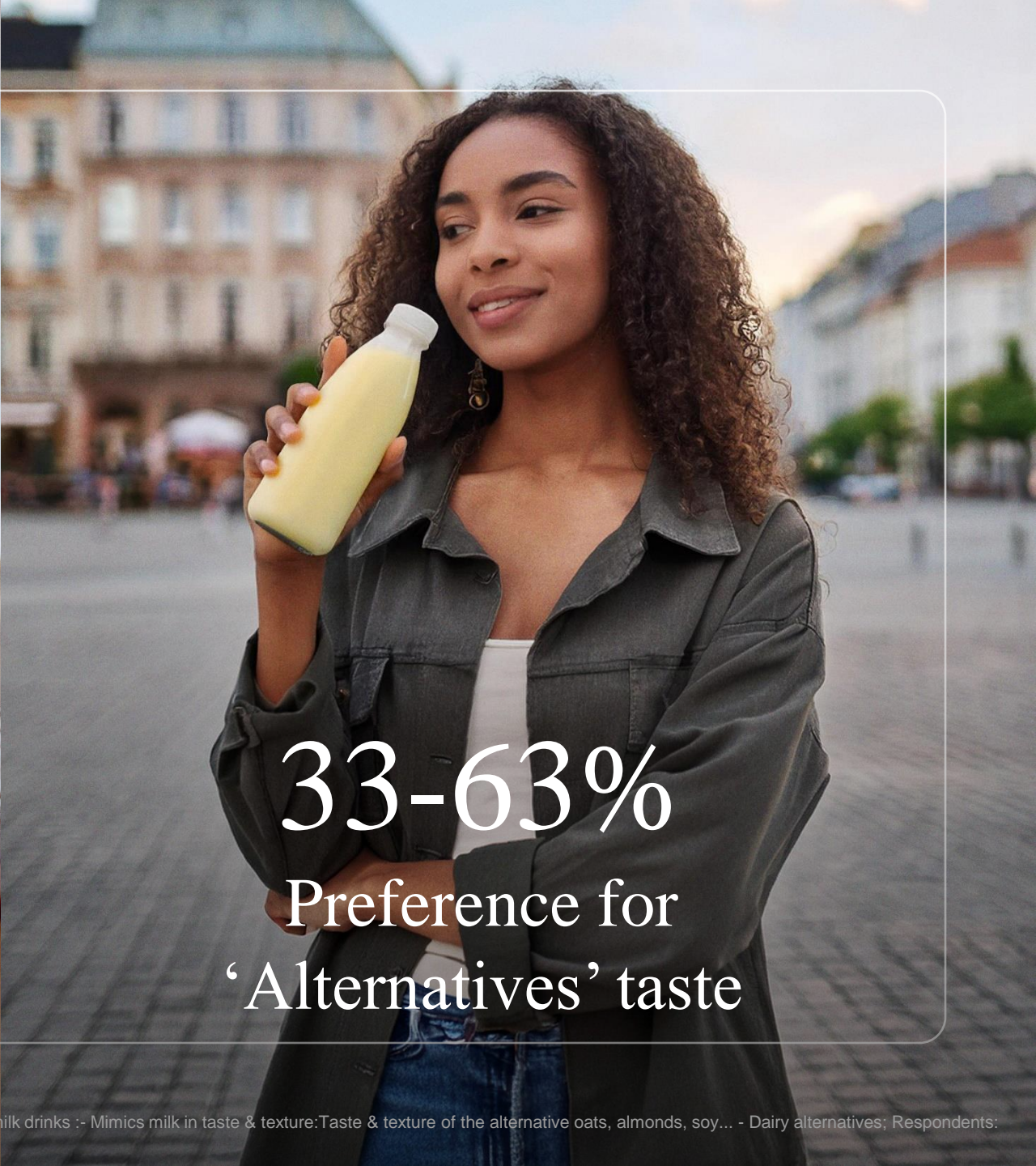
- ✓ Flexitarian lifestyle
- ✓ Nutritiously balanced meal
- ✓ Convenient for a busy mother of 2
- ✓ Spike her curiosity to try something new



What we already know...

13-36%

Preference for
'Like Milk'

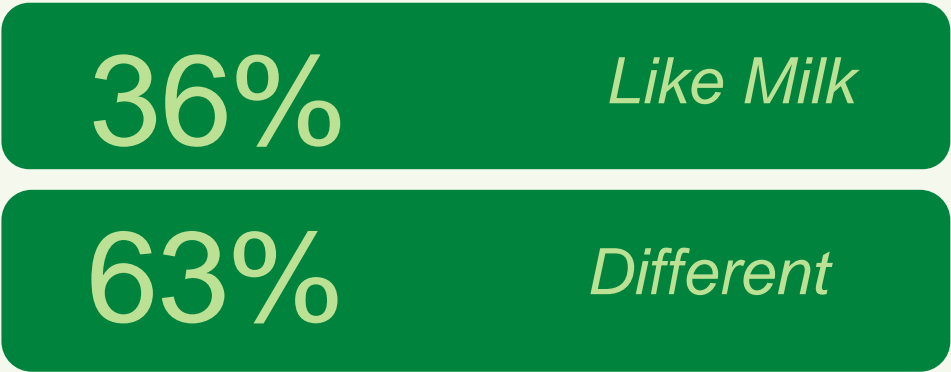


33-63%

Preference for
'Alternatives' taste

Close/ Like Milk?

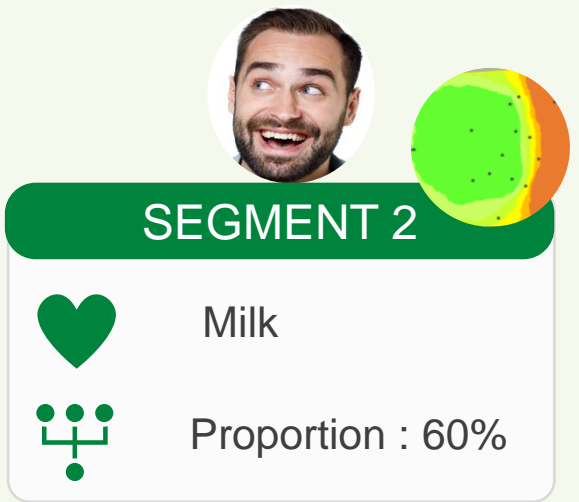
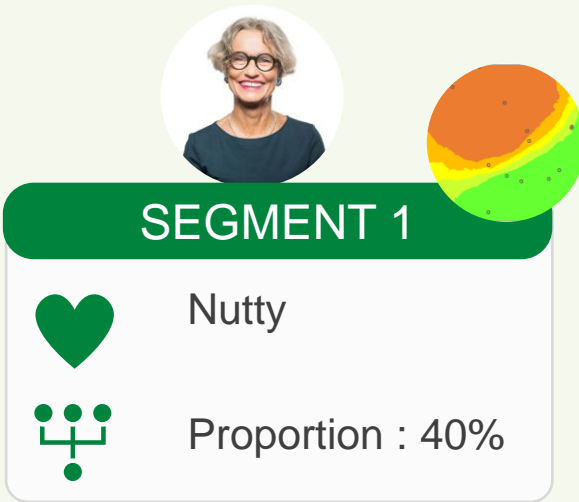
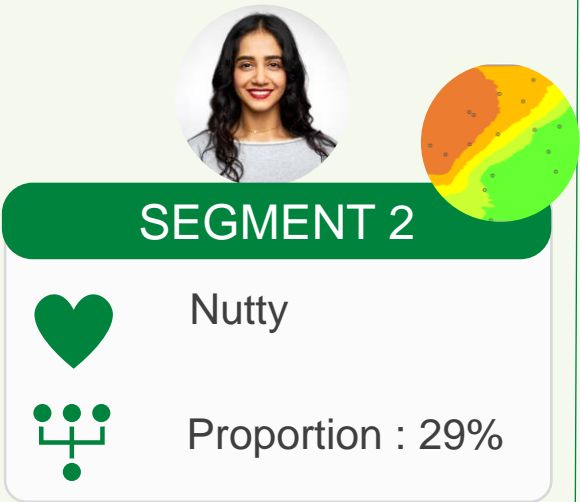
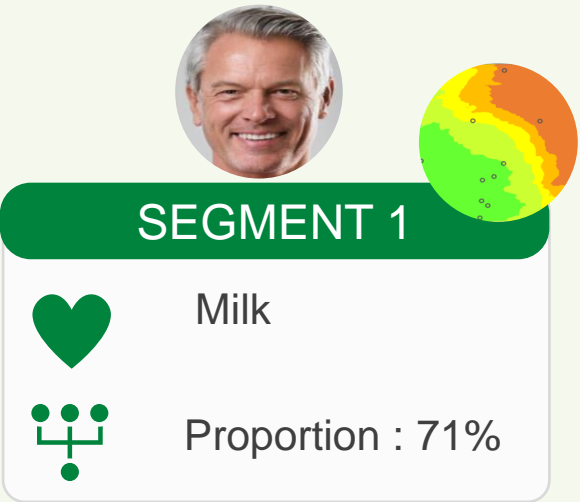
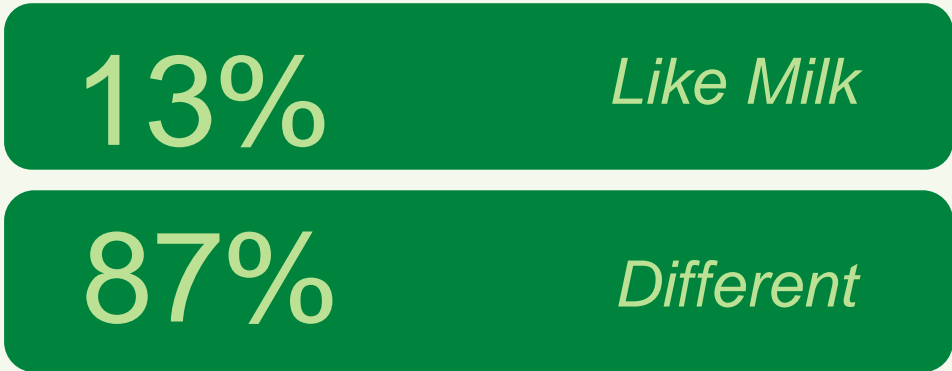
Flexitarian consumers say:
a **Milk substitute** should taste...



F

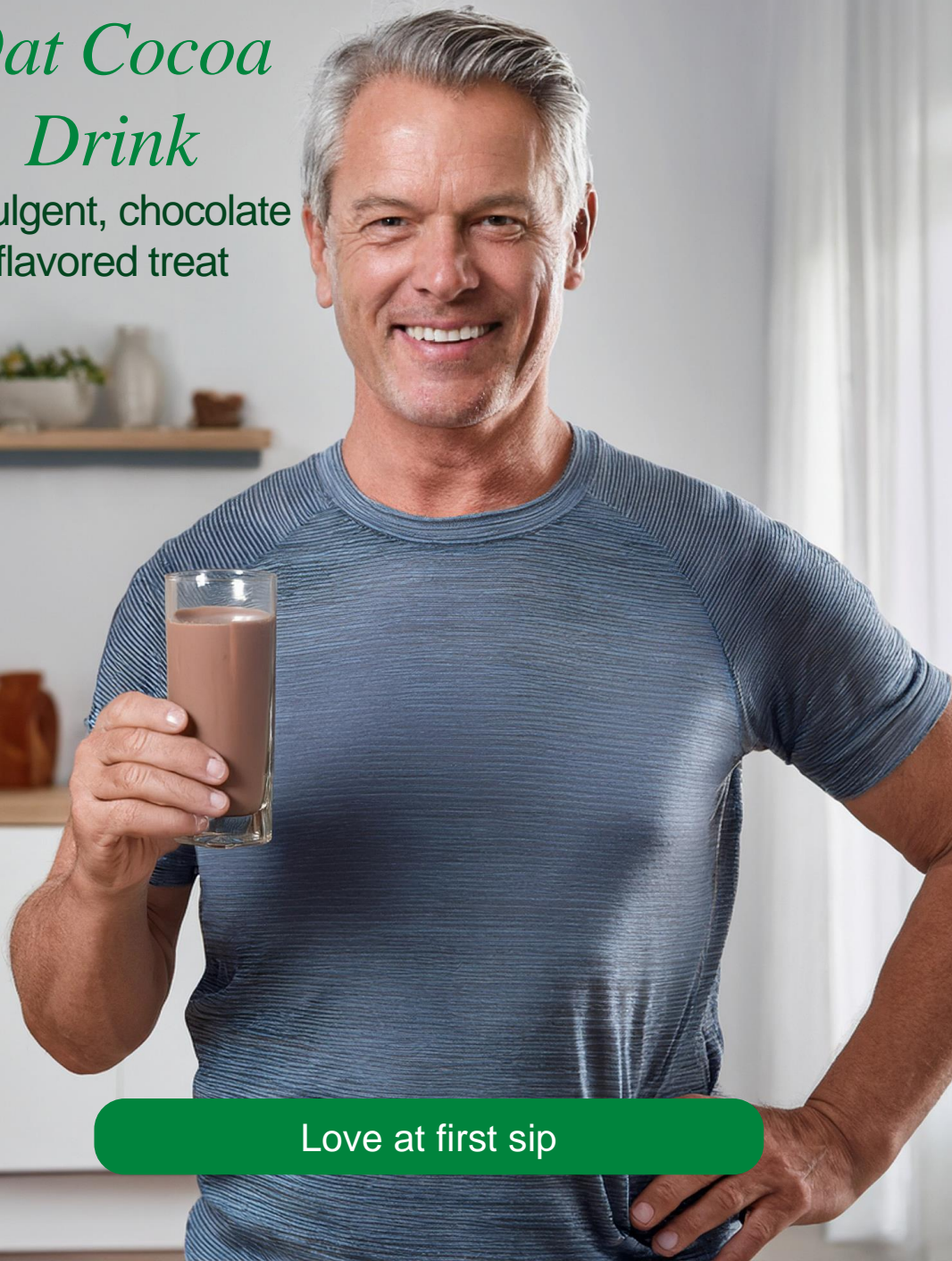


Vegan consumers say:
a **Milk substitute** should taste...



Oat Cocoa Drink


Indulgent, chocolate
flavored treat





Love at first sip

Sensory product preferences differ per segment

Udo



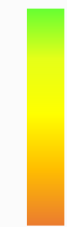
 Milk

 Proportion : 71%

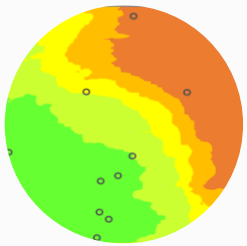
Formulation

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Region of high
preference



Region of low
preference



PLS Map regressing likings on
sensory attributes driving liking

Attitudes & Behaviours

- ✓ Supports Udo's drive for Health
- ✓ Let's him indulgence on the taste of chocolate pudding
- ✓ Brings back the feeling of security from his childhood



LISTEN to
& OBSERVE
your consumer

Consumer Journey & Feedback
About Meat & Dairy Alternatives

Not one size fits all!

Your co-creation partner for success

- ✓ Expertise
- ✓ Innovation
- ✓ Portfolio
- ✓ Sustainability

Meat & Dairy Alternatives

Delightful
with purpose



