



[Logo made with Canva.]

# Brand Extension Proposal: **Ben & Jerry's Pea Protein**

Arayana Janson

<https://youtu.be/YIoHif5PW60>





# Research Methods

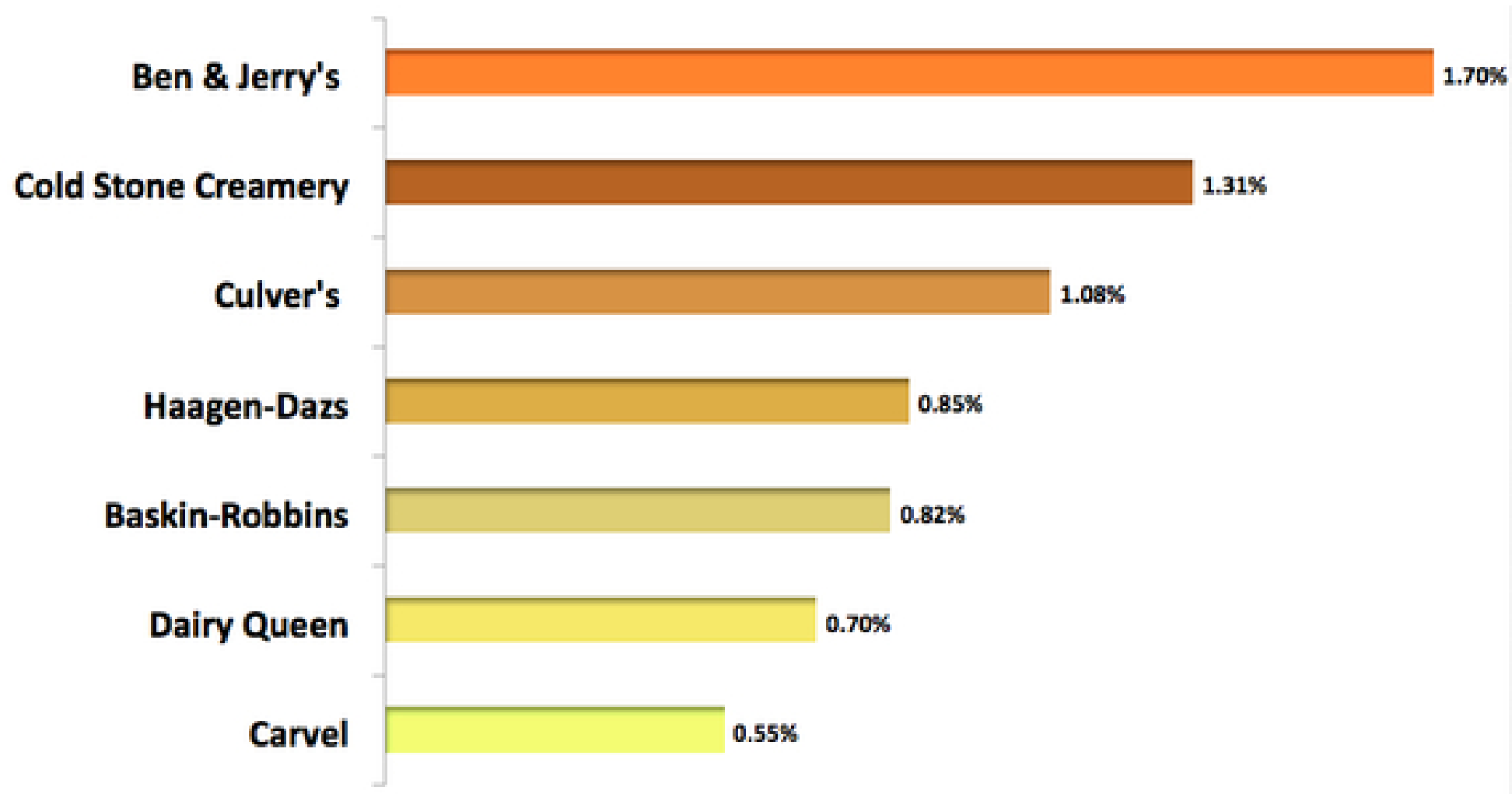


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# Ben & Jerry's

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## Ben & Jerry's is the top favorite ice cream chain in the U.S., according to *Market Force Information* (2012) and *Statista* (2019)



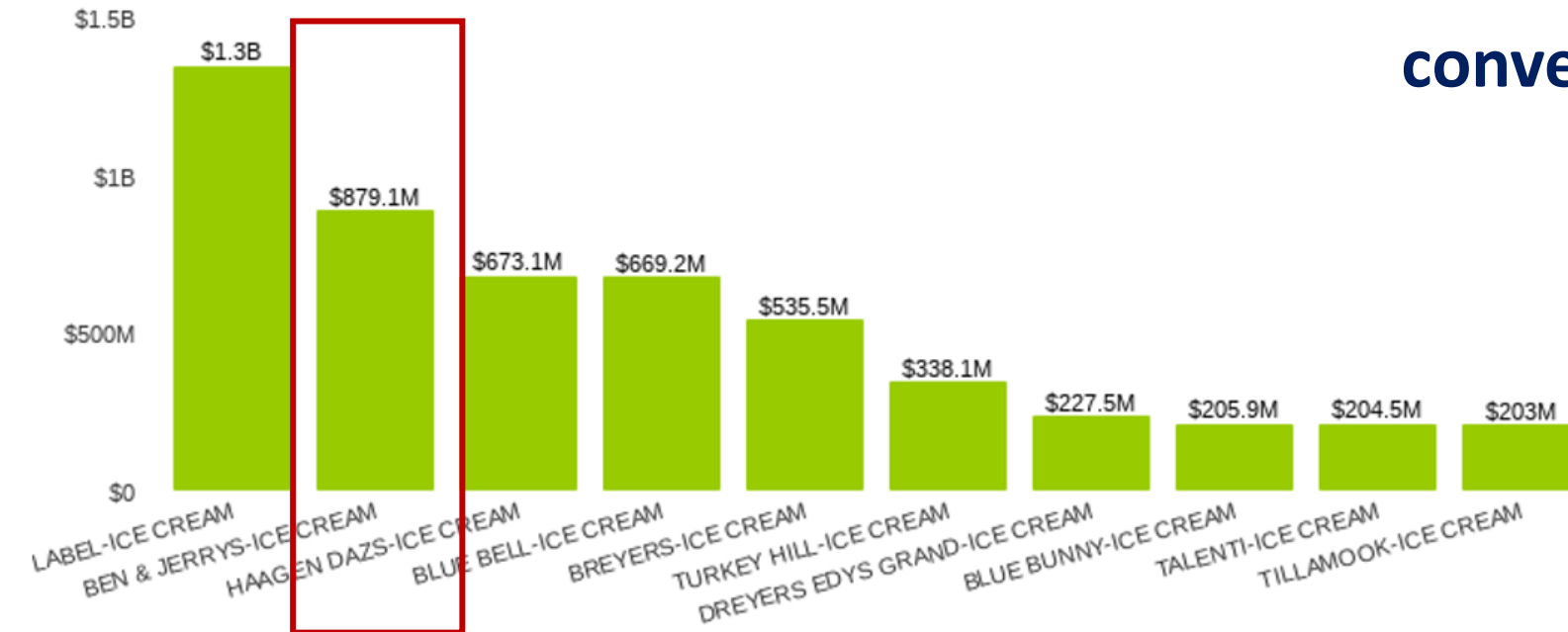
Huffington Post. (2012, September 27). America's Favorite Ice Cream Chains. Retrieved from [https://www.huffpost.com/entry/americas-favorite-ice-cream-chains\\_n\\_1918747](https://www.huffpost.com/entry/americas-favorite-ice-cream-chains_n_1918747)

Wunsch, N. (2020, November 26). Top selling ice cream brand U.S., 2019. Retrieved from <https://www.statista.com/statistics/190426/top-ice-cream-brands-in-the-united-states/>

# Top Ice Cream Brands

In a year (Nov '19 – Nov '20), Ben & Jerry's remained the top selling single-brand ice cream in US retail outlets (grocery and convenience stores).

Total US - Multi Outlet + Conv / Latest 52 Weeks Ending 11-01-20  
Dollar Sales



Hula Girl Ice Cream & Desserts LLC, an independent franchisee of Ben & Jerry's™. (2020). Catering Event Services. Retrieved from <http://www.wabenjerry.com/cow-mobile.html>



IRI

Information Resources, Inc. (2020). Marketing Mix Product Overview, Ice Cream Brands. Retrieved from <https://advantage.iriworldwide.com/unify-client/>

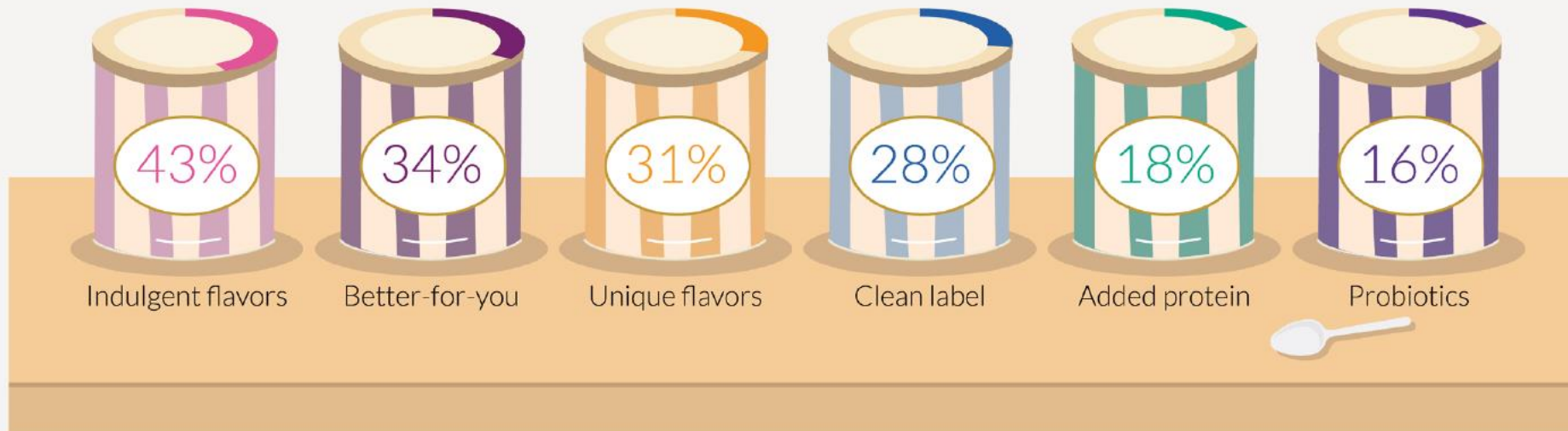
Ben & Jerry's is the best-selling ice cream brand in the U.S. because it gives customers what they want in an ice cream, especially including **BETTER-FOR-YOU** ingredients and indulgent, unique flavors.



## MAKE INDULGENCE PERMISSIBLE, FUNCTIONAL

Innovation  
to drive trial,  
January 2020

Consumers want it all, a mix of indulgent, interesting flavors as well as better for you formulations and clean labels. Brands can tap into both desires by giving consumers indulgent flavors and formulations alongside BFY benefits like added protein, mini sizes, or simple ingredient lists that make the indulgence more permissible or functional.



Note: "Which of the following would motivate you to try a new ice cream or frozen treat? Please select all that apply." | Base: 2,000 internet users aged 18+ | Source: Lightspeed/Mintel



**Ben & Jerry's, committed to a Product Mission that includes the incorporation of wholesome, natural ingredients is also dedicated to improving the quality of life in society.**



Our Product Mission drives us to make fantastic ice cream – for its own sake.

To make, distribute and sell the finest quality ice cream and euphoric concoctions with a continued commitment to incorporating wholesome, natural ingredients and promoting business practices that respect the Earth and the Environment.



Our Social Mission compels us to use our Company in innovative ways to make the world a better place.

To operate the Company in a way that actively recognizes the central role that business plays in society by initiating innovative ways to improve the quality of life locally, nationally and internationally.

Ben & Jerry's Homemade, Inc. (2020). Our Values. Retrieved from <https://www.benjerry.com/values>

# 2016

You dared us to go dairyless—and we did!

Our Non-Dairy flavor creations are made with almond milk, 100% Certified Vegan, and boldly loaded with chunks and swirls. You'll get Ben & Jerry's euphoria in every bite. These flavors deliver everything... but the cow. The first Non-Dairy flavors in our line up were: Chocolate Fudge Brownie, Chunky Monkey, Coffee Caramel Fudge and P.B. & Cookies.



Ben & Jerry's Homemade, Inc. (2020). Ben & Jerry's History. Retrieved from <https://www.benjerry.com/about-us#5timeline>

## A healthy ice cream with healthy ingredients fits the Ben & Jerry's brand image!



In 2019,  
Unilever  
stepped up  
the availability  
of its plant-  
based  
products in  
three ice  
cream brands:

- **Magnum Vegan** (<2% pea protein)
- **Cornetto Vegan** (soy)
- **Ben & Jerry's Dairy-Free** (almond)



**This move was justified by company growth supported by better-for-you offerings, like those under the Ben & Jerry's name.**



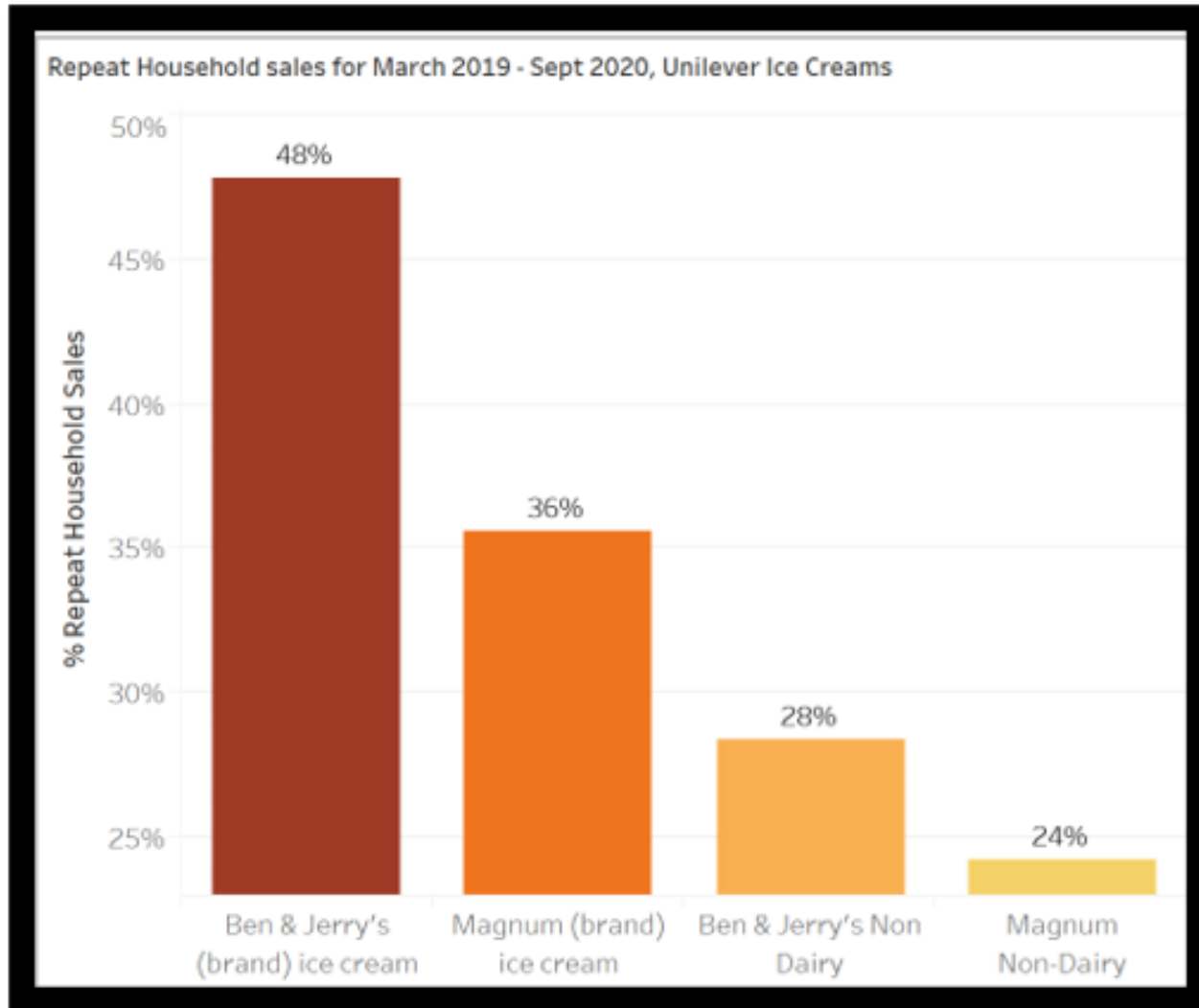
Unilever. (2019). Unilever Annual Report and Accounts 2019. Retrieved from [https://www.unilever.com/Images/unilever-annual-report-and-accounts-2019\\_tcm244-547893\\_en.pdf](https://www.unilever.com/Images/unilever-annual-report-and-accounts-2019_tcm244-547893_en.pdf)

**In the last 52 weeks of 2019, non-dairy ice cream sales totaled around \$336M in the US.**

Wunsch, N. (2020, November 24). Dairy alternatives: Dollar sales by category U.S. 2019. Retrieved from <https://www.statista.com/statistics/932823/dairy-alternatives-sales-by-category/>



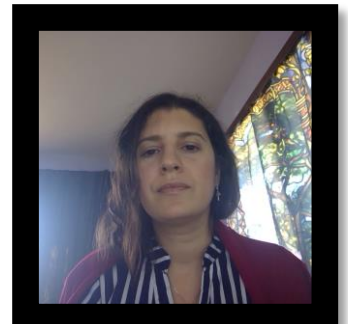
Ben & Jerry's dairy and non-dairy ice creams have performed better in % Repeat Household Sales over the last year-and a half than their respective Magnum counterparts. (However, Magnum non-dairy is only newly released in the market—in 2019).



**% Repeat Household sales** are greater for Ben & Jerry's Dairy and Non-Dairy ice creams when compared to their respective Magnum counterparts.



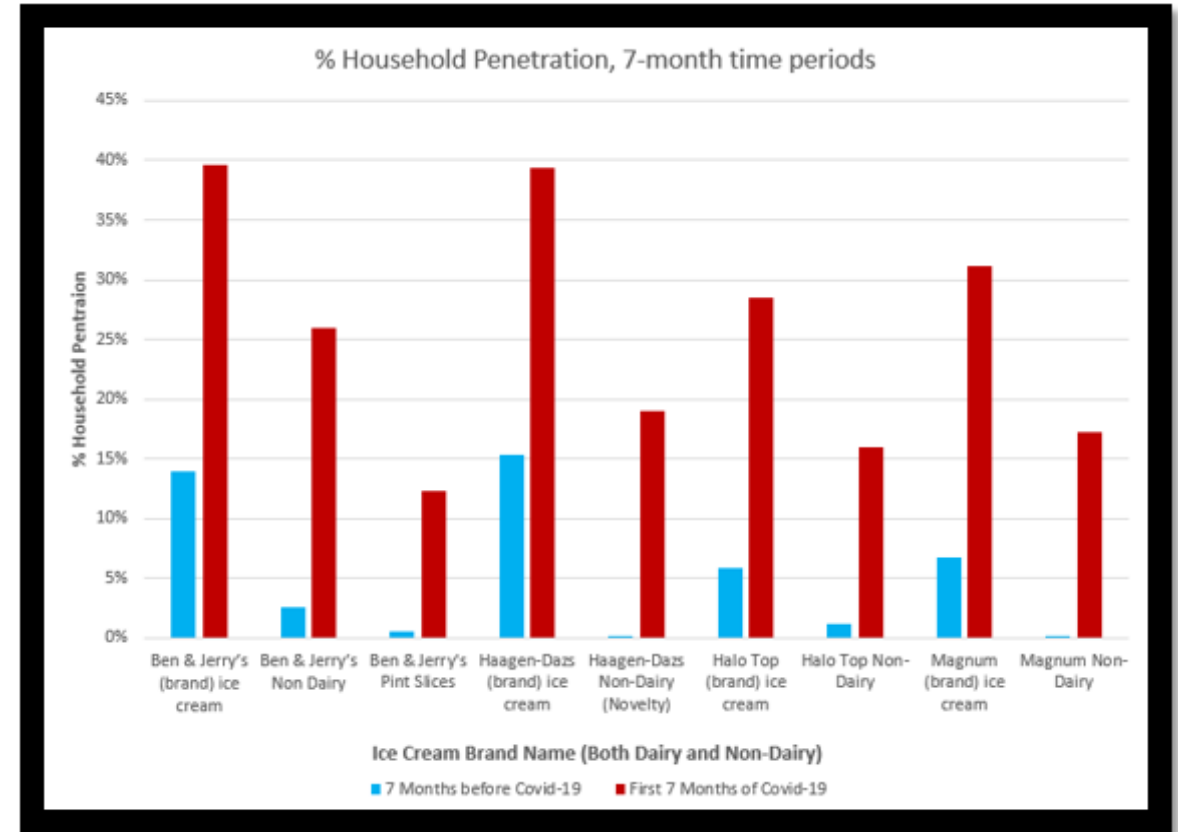
Numerator. (November, 2020). Shopper Metrics reports combined. Retrieved from <https://insights.numerator.com/>



# Shopper Metrics

During the pandemic, US %Household Penetration increases for both dairy and non-dairy ice cream offerings!

**Ben & Jerry's Non-Dairy Ice Cream has the highest % household penetration amongst all non-dairy ice creams the Numerator dataset.**



**% Household Penetration**—the percentage of total households that purchased the product—increased during the first 7 months of Covid-19 for all ice cream products (dairy and non-dairy).



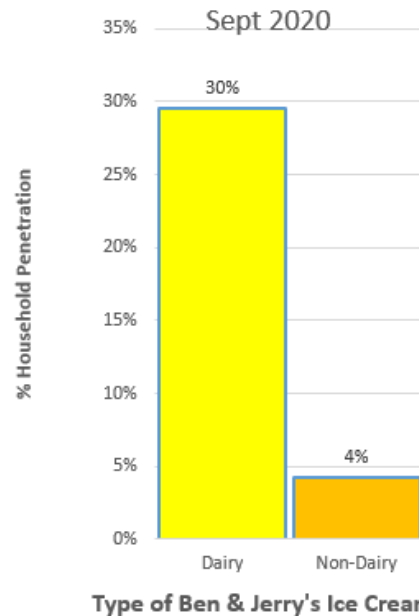
# Repeat household sales rates in the U.S. for Ben & Jerry's Non-Dairy ice cream show high customer loyalty



**Percentage repeat household sales in the ~1.5 years between March 01, 2019 and September 30, 2020 for Ben & Jerry's Non-Dairy is more than half of Ben & Jerry's Dairy repeat household sales percentage.**

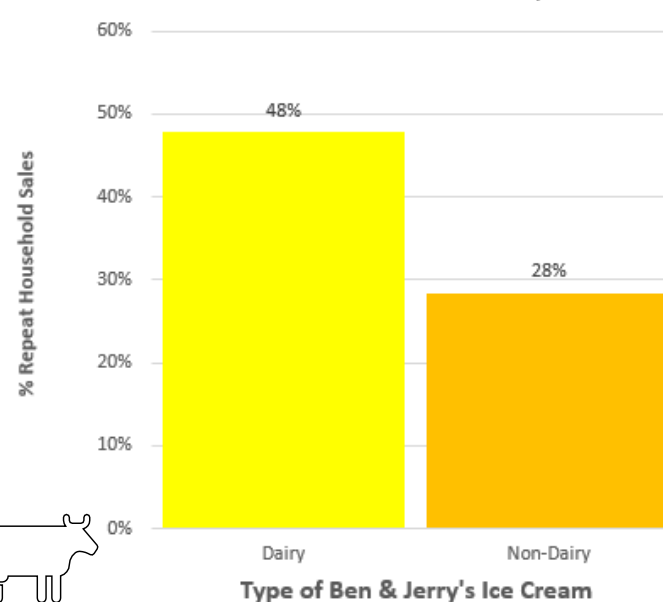
**%Repeat Household Sales = Of those who purchased an item, the percentage that bought that item more than once.**

% HHs For Dairy vs. Non-Dairy Ben & Jerry's Ice Cream for March 2019 - Sept 2020



% Household Penetration

% Repeat HHs For Dairy vs. Non-Dairy Ben & Jerry's Ice Cream for March 2019 - Sept 2020



% Repeat Household Sales



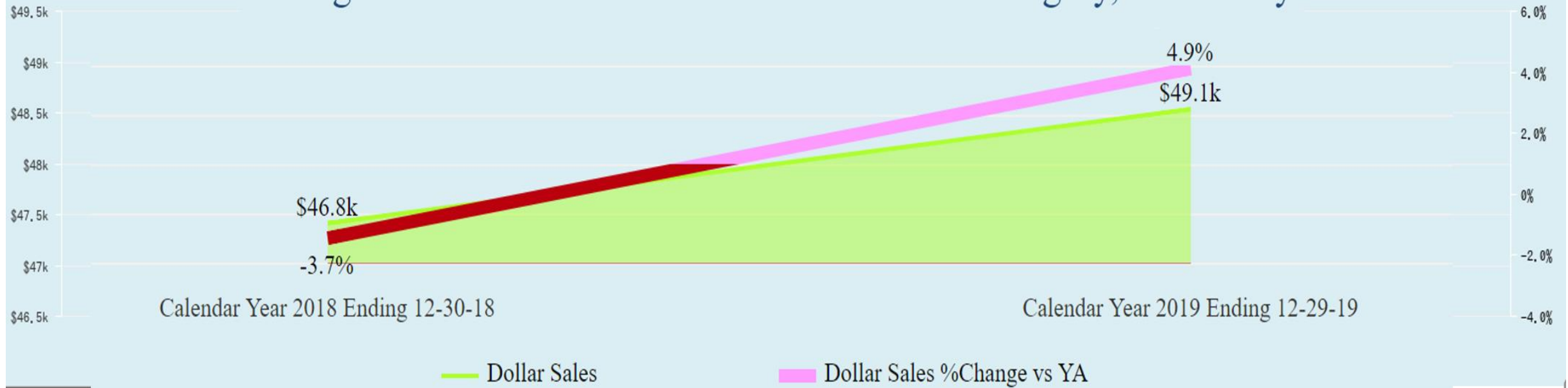
Numerator. (November, 2020). Shopper Metrics reports combined. Retrieved from <https://insights.numerator.com/>

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# The Marketplace

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## Change in Sales 2018 - 2019 for Ice Cream Subcategory, Non-Dairy



**According to IRI, dollar sales for the ice cream brands and flavors with a "No Dairy" claim have been increasing steadily since 2018.**



Information Resources, Inc. (2020). Dollar sales for Ice Cream subcategory - 2018 - 2019 - "No Dairy" Dairy Claim Value. Retrieved from <https://advantage.iriworldwide.com/unify-client/>





# Dairy alternative milks are popular, and not only because of intolerances or allergies!

## CONSUMERS ARE SEEKING OUT DAIRY ALTERNATIVES FOR A RANGE OF REASONS

### Dairy alternative usage motivations, March 2020

Over 40% of dairy alternative users cite a dairy/lactose allergy or intolerance as their motivation, indicating these products are relied on for physical wellbeing. Belief that plant-based products are healthier than traditional dairy is also a top motivator, and brands can appeal to consumers by emphasizing health benefits over both traditional dairy and competing dairy-free products.



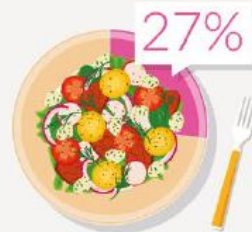
Any dairy/lactose allergy or intolerance\*



Think it is healthier than traditional dairy



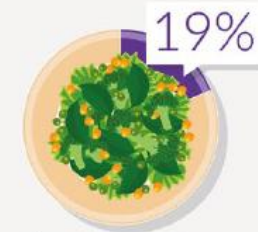
For variety in diet



Prefer the taste



Better for the environment



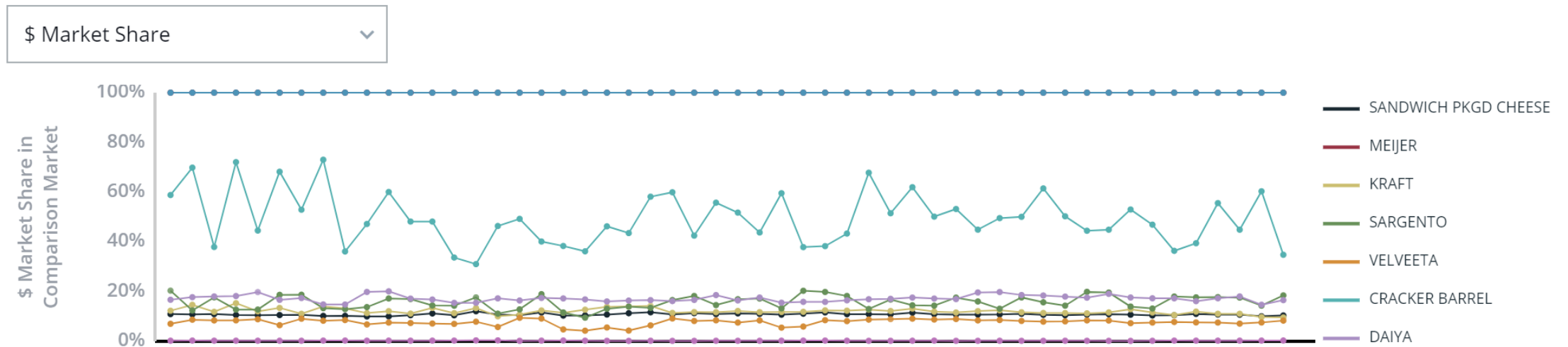
I'm managing my cholesterol

Note: \* net of dairy/lactose allergy or intolerance | Base: 806 internet users aged 18+ who have someone that uses dairy alternatives in the household | Source: Lightspeed/Mintel



# U.S. market share for Dairy Alternative (Daiya) sandwich packaged cheese steady and strong

## Meijer Central TA Market Share Trend Vs. XAOC Comp By BRAND



**Daiya brand dairy-free cheese has steadier and higher sales than all other brands except one.**



Nielsen Holdings PLC. (2020). Trended Share and Sales by Product, Sandwich Packaged Cheese. Retrieved from <https://ng2.answers.nielsen.com/>

## Why are consumers choosing dairy-free?

**65%** of the population has a reduced ability to digest lactose<sup>5</sup>

**15 MILLION AMERICANS** have food allergies<sup>6</sup>

**+600%** in veganism in last 3 years<sup>7</sup>

- 1 Global Market Insights, Inc. report
- 2 IRI Panel & Syndicated, MULO, 52 WK 7/15/18
- 3 Mintel, US Non-Dairy Milk Market Report, Sept. 2017
- 4 Fresh Direct; 2019 Grocery Trends article
- 5 US National Library of Medicine, Genetics Home Reference
- 6 foodallergy.org
- 7 GlobalData report, Top Trends in Prepared Foods 2017

## What is the hottest news in dairy?

Non-dairy ice cream market to exceed  
**\$1 billion** by 2024<sup>1</sup>

Dairy Free has grown 5.3M new households in the last year<sup>2</sup>

**% Household Penetration**  
Dairy Free Ice Cream & Novelties

YA **4.9%**  
L52 **7.1%**

**61%**  
growth in non-dairy milk sales over the last five years in the US.<sup>3</sup>

Berry, D. (2019, April 26). Berry on Dairy: Dairy Case Innovation: It's Spring! Look what's growing. Retrieved from <http://berrondairy.blogspot.com/2019/04/>



Karolina B. (2020). No cow on The Noun Project. Retrieved from <https://thenounproject.com/term/no-cow/2202172/>



Sergey. (2019, February 09). Ben&Jerry's Ice Cream in Young Adult (2011). Photo retrieved from <https://productionplacementblog.com/movie/s/ben-jerrys-ice-cream-in-young-adult-2011/>





# In the U.S., Ben & Jerry's Non-Dairy ice cream sells the most to young people, particularly aged 18 – 20 and 21- 24.



AGE (GENERATION)	% GENERATIONS, FOCUS	% ALL SHOPPERS, BENCHMARK	INDEX
Gen Z [> 1996]	7.8%	4.6%	170
Millennials [1982-1995]	29.2%	24.1%	121
Gen X [1965-1981]	35.4%	32.2%	110
Boomers [1945-1964]	26.0%	34.1%	76
Seniors [< 1945]	1.6%	4.9%	33

AGE (BRACKETS)	% GENERATIONS, FOCUS	% ALL SHOPPERS, BENCHMARK	INDEX
18-20	0.9%	0.4%	220
21-24	6.9%	4.2%	165
25-34	21.4%	16.7%	128
35-44	19.0%	18.5%	103
45-54	21.8%	18.6%	117
55-64	18.3%	19.9%	92
65+	11.7%	21.8%	54

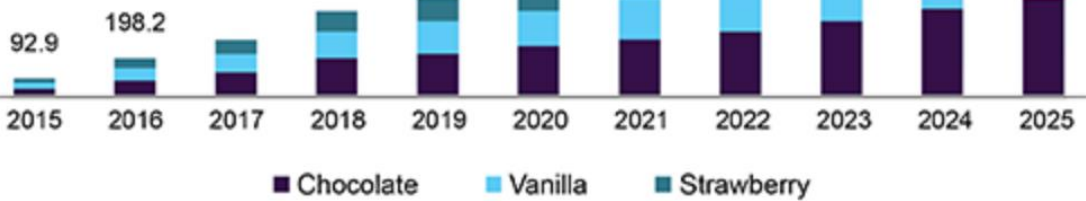
LIFESTAGE	% GENERATIONS, FOCUS	% ALL SHOPPERS, BENCHMARK	INDEX
New Family	1.7%	1.6%	108
Small Family	6.4%	5.3%	120
Large Younger Family	12.6%	13.3%	95
Large Older Family	9.9%	8.2%	120
Young Singles	13.1%	9.3%	141
Young Couples	7.7%	4.5%	169
Adult Singles	15.2%	15.9%	95
Adult Couples	20.4%	19.2%	106
Senior Singles	3.6%	7.3%	49
Senior Couples	6.2%	12.0%	52



Numerator. (November, 2020). Shopper Profile Report for 03-01-2019 to 03-01-2020. Retrieved from <https://insights.numerator.com/>

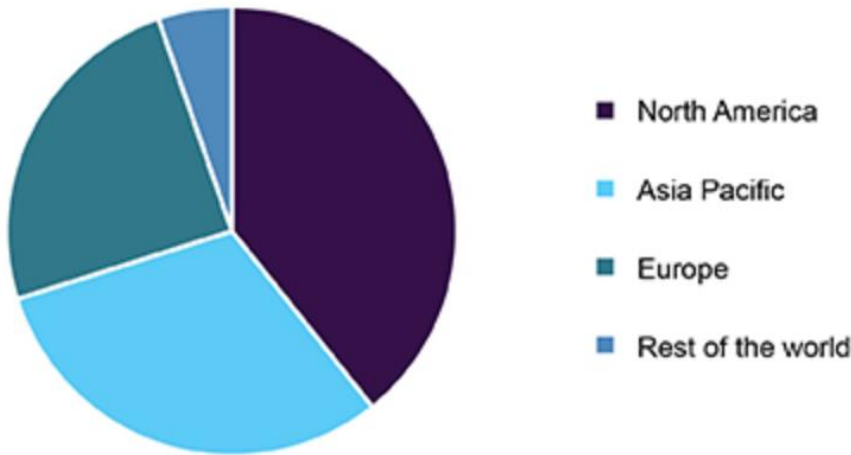
# Global Dairy-Free Ice Cream Options on The Rise!

Global dairy-free ice cream market size, by flavor, 2015 - 2025 (USD Million)



Source: [www.grandviewresearch.com](http://www.grandviewresearch.com)

Global dairy-free ice cream market share, by region, 2018 (%)



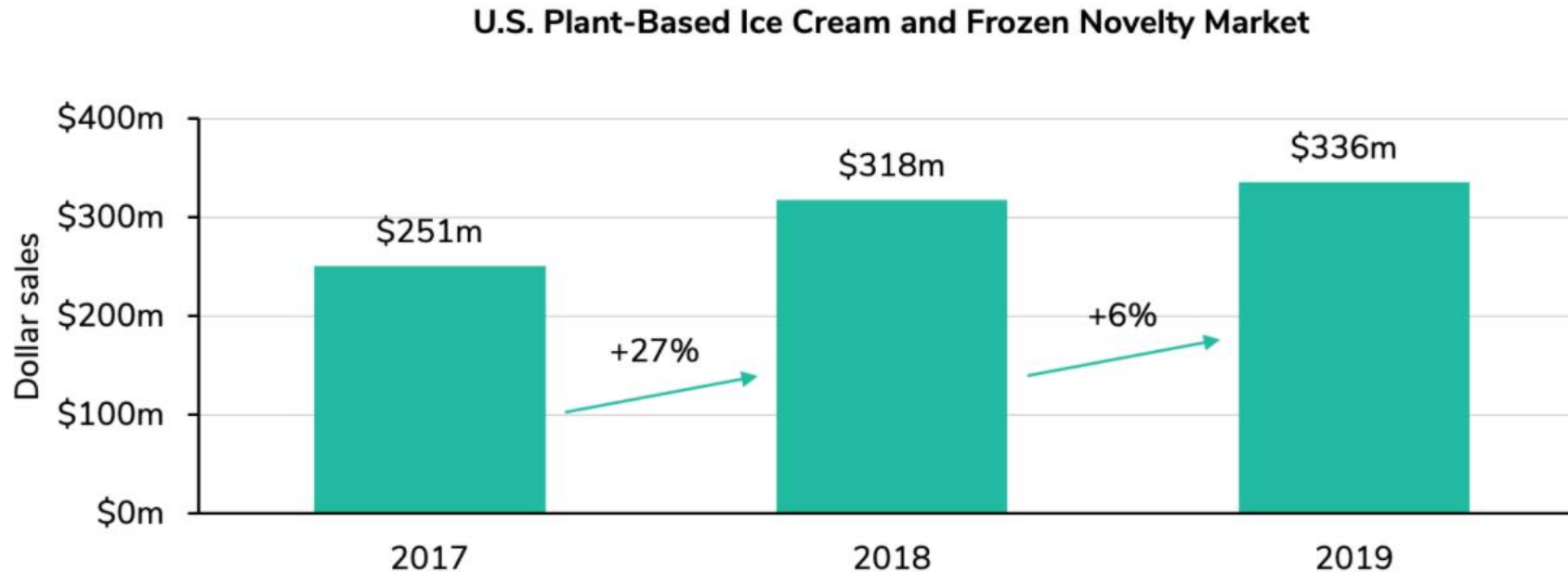
The largest share globally is North America.



Grand View Research. (2020). Dairy-Free Ice Cream Market Size & Share: Industry Report, 2019-2025. Images and info retrieved from <https://www.grandviewresearch.com/industry-analysis/dairy-free-ice-cream-market>



**Dollar sales of the plant-based ice cream and frozen novelty category increased by 33% between 2017 and 2019, and sales are expected to continue to grow 14.8% by 2025.**



Source: SPINSScan Natural and Specialty Gourmet (proprietary), SPINSScan Conventional Multi Outlet (powered by IRI), 104 weeks ending 12-29-2019

© 2020 The Good Food Institute, Inc.



Good Food Institute. (2018, November 27). U.S. Plant-Based Market Overview - New SPINS retail sales data. Retrieved from <https://www.gfi.org/marketresearch>

**The global dairy-free ice cream market was \$456M in 2018 and is \$601M in 2020, with a projected growth rate of 14.8% from 2019-2025.**

Grand View Research. (2020). Dairy-Free Ice Cream Market Size & Share: Industry Report, 2019-2025. Images and info retrieved from <https://www.grandviewresearch.com/industry-analysis/dairy-free-ice-cream-market>

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# Sugar

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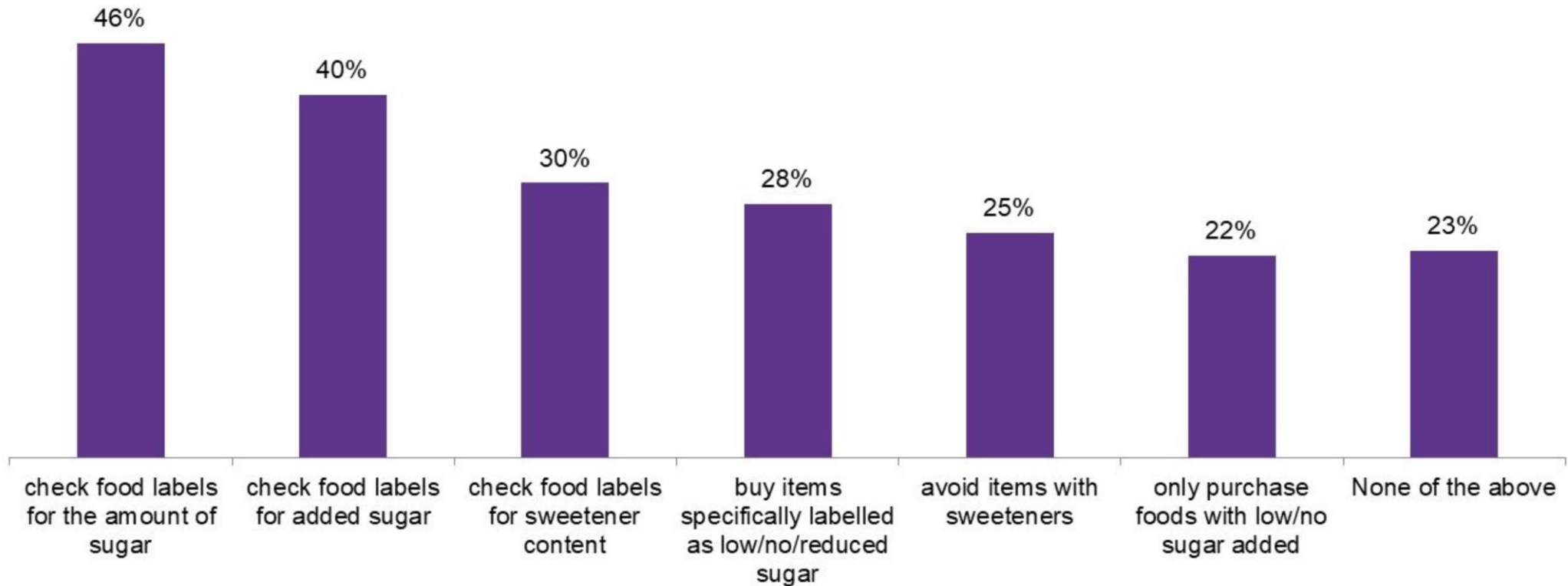


**28% of consumers look for a “low/reduced/no sugar” label on foods, and 22% purchase only foods with low/no sugar added assurances.**

Figure 35: Sugar/sweetener content and shopping behavior, October 2020

Base: 2,000 internet users aged 18+

"When choosing food and drinks, I... Please select all that apply."

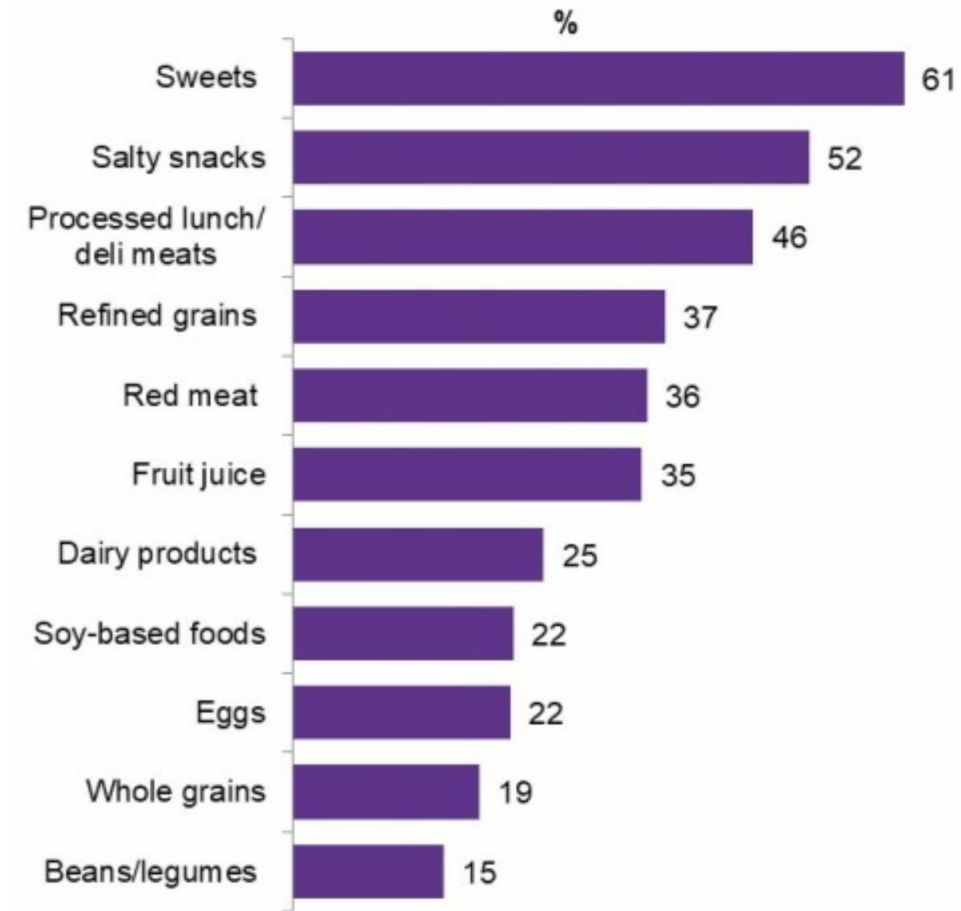


Source: Lightspeed/Mintel

Figure 44: Foods limited in diet, August 2020

Base: 1,868 internet users aged 18+ who put some effort toward healthy eating

"When planning meals you consider healthy/better for you, which of the following food types do you limit or eliminate? Please select all that apply."



Source: Lightspeed/Mintel

When planning healthy meals, sweets are the first thing to come off the table. -Mintel

70% of Americans are either somewhat or very concerned about the level of sugar in their diets. -Ipsos

Siegner, C. (2018, December 13). 70% of US adults are concerned about sugar consumption, study finds. Retrieved from <https://www.fooddive.com/news/70-of-us-adults-are-concerned-about-sugar-consumption-study-finds/543921/>



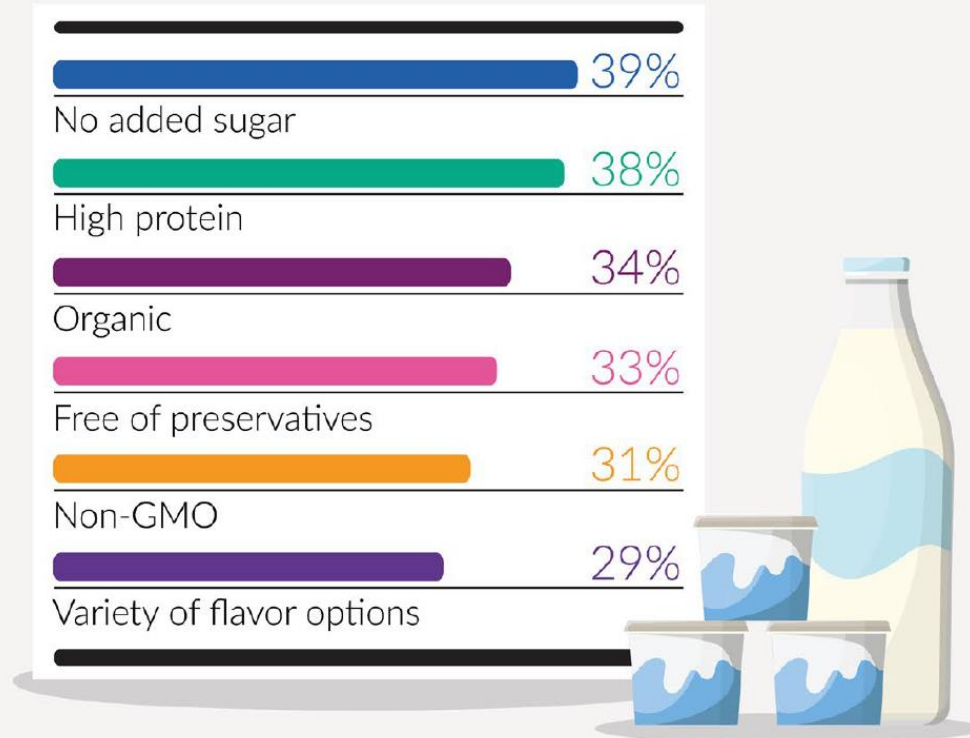
Foster, K. (2019, May 30). A Complete Visual Guide to 11 Different Kinds of Sugar. Retrieved from <https://www.thekitchn.com/a-complete-visual-guide-to-sugar-ingredient-intelligence-213715>

Formanksi, K. (2020, November). Better for You Eating Trends: Incl Impact of COVID-19 - US - November 2020. Retrieved from <https://reports-mintel-com.libproxy.library.wmich.edu/display/1051965>

# People look for no added sugar in dairy alternatives. High protein and flavor also important.



## DITCH THE SUGAR, BRING ON THE PROTEIN



### Important label claims for dairy alternatives, March 2020

No added sugar is a key feature for attracting consumers of dairy alternatives, and this is especially important in the most commonly used non-dairy products, such as milk and yogurt substitutes, which often contain added sweeteners. Additionally, users of dairy alternatives do not want to lose the high protein content that many traditional dairy products contain.

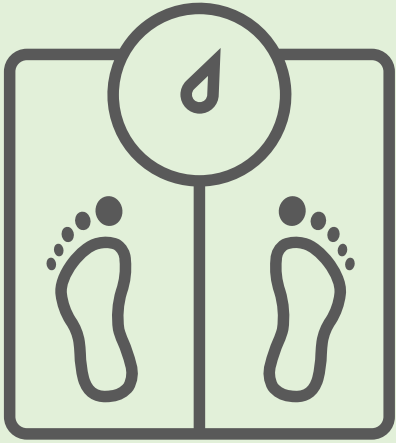
Base: 806 internet users aged 18+ who have someone that uses dairy alternatives in the household | Source: Lightspeed/Mintel



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# Pea Protein

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Reduce  
caloric intake  
by 12%



22 g  
protein per  
serving



Top 8  
food  
allergens



94% of  
daily iron



# Health Benefits of Pea Protein

# Pea protein: the hot "new" dairy/protein replacement

- The actual protein content in pea protein content can be **comparable to cow's milk protein content**.
- Pea-based protein powders are **already popular in the marketplace** for workouts and muscle building.

Fleming, A., Marry, Balaji, I., Jessa, & Julie. (2020, September 03). Ripple Dairy-Free Ice Cream Reviews & Info (Vegan Frozen Dessert). Retrieved from <https://www.godairyfree.org/product-reviews/ripple-dairy-free-ice-cream>

- Pea protein **contains all 9 essential amino acids that the body has to get from food sources**.
- Pea protein is also a great source of several branched-chain amino acids, including Arginine, which promotes **healthy hearts** and **blood flow**.

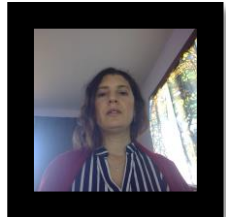


- Pea protein is one of the **more easily-digested** plant-source proteins. Also, **it reduces caloric intake by 12%**.
- Pea protein is a **great source of iron (94% of the daily recommendation)** and a good source of **calcium and vitamin D\***.

\* Kubala, J. (2018, September 29). Ripple Milk: 6 Reasons Why You Should Try Pea Milk. Photo retrieved from <https://www.healthline.com/nutrition/ripple-milk>

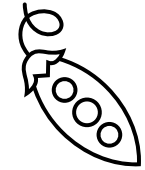
- Pea protein **does not contain any of the top eight food allergens**, which include peanuts, tree nuts, cow's milk, wheat and soy.

Julson, E. (2018, November 30). Pea Protein Powder: Nutrition, Benefits and Side Effects. Photo and info retrieved from <https://www.healthline.com/nutrition/pea-protein-powder>



"I hate almost every non-dairy ice cream I try because they have such a strong coconut flavor or the wrong texture, but this ice cream...is perfect!" (Fleming, 2020)

Fleming, A., Marry, Balaji, I., Jessa, & Julie. (2020, September 03). Ripple Dairy-Free Ice Cream Reviews & Info (Vegan Frozen Dessert). Retrieved from <https://www.godairyfree.org/product-reviews/ripple-dairy-free-ice-cream>  
Kubala, J. (2018, September 29). Ripple Milk: 6 Reasons Why You Should Try Pea Milk. Photo retrieved from <https://www.healthline.com/nutrition/ripple-milk>



100% VEGAN



LACTOSE FREE



GMO FREE



SOY FREE



CONTAINS GLUTEN\*

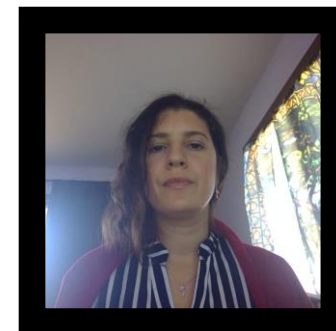


CONTAINS COCONUT

Yummy ripple 🍦 ice cream ... I'm so happy he doesn't have to feel left out... He loves it #mylittleman #rippleicecream #rippleforthewin #lovesripple #lifewithallergies #birthdaycelebrations 🍰🎂 [instagram.com/p/CFA-cwYg3gxz...](https://www.instagram.com/p/CFA-cwYg3gxz...)

My Info @NMoen911 (2020, September 11). Yummy ripple Ice cream ice cream ... I'm so happy he doesn't have to feel left out... He loves it #mylittleman #rippleicecream #rippleforthewin #lovesripple #lifewithallergies #birthdaycelebrations [Tweet]. Twitter. <https://twitter.com/NMoen911/status/1304567445177470976?s=20>

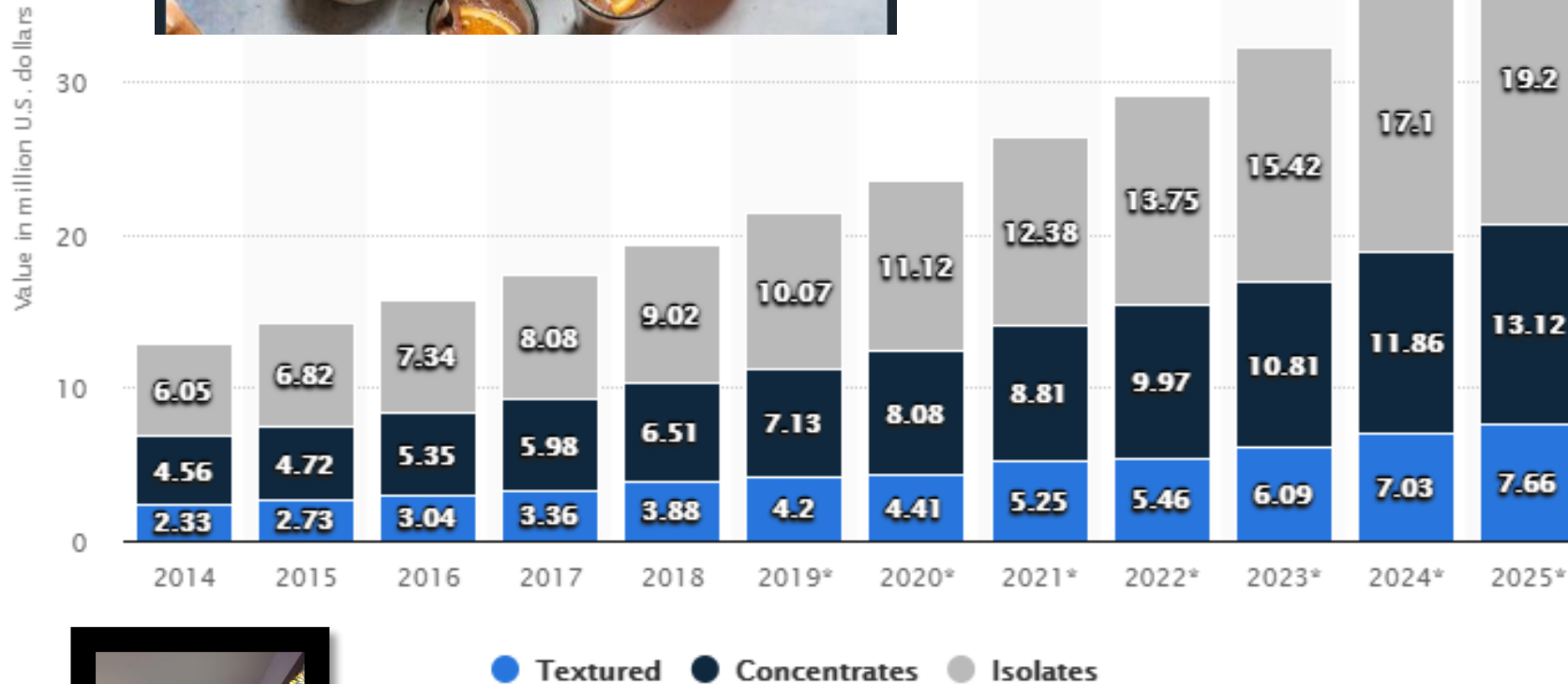
Michaelangelo Hindma @MichaelangeloHi · Sep 19, 2015  
Birthday celebrations @HIXRestaurants #hixchophouse #bakewelltart #rippleicecream #chocolatemousse #birthday #truffle



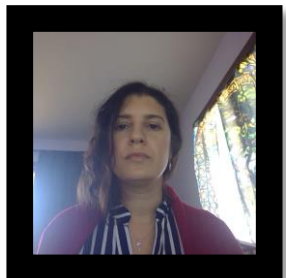
Michaelangelo Hindma @MichaelangeloHi. (2015, September 19). Birthday celebrations @HIXRestaurants #hixchophouse #bakewelltart #rippleicecream #chocolatemousse #birthday #truffle [Tweet]. Twitter. <https://twitter.com/MichaelangeloHi/status/645382723452936193?s=20>

Ripple Foods. (2020). Ripple Fan Favorites Frozen Dessert (6 Pack). Retrieved from <https://shop.ripplefoods.com/collections/all-products/products/ripple-fan-favorites-frozen-dessert-6-pack>





The projected U.S. pea protein market value reflects steadily increasing sales—from a total of ~24M in 2020 to ~40M in 2025 (almost double)!!



Wunsch, N. (2020, November 25). Pea protein: Forecast market value by type U.S. 2014-2025. Retrieved from <https://www.statista.com/statistics/1016951/value-of-the-us-pea-protein-market-by-type/>

statista



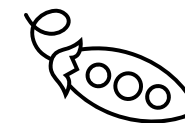
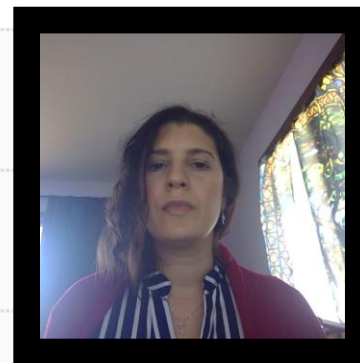




1 400

1 000

Value in million U.S. dollars



**The projected global pea protein market value reflects steadily increasing sales as well—from a total of ~430M in 2020 to ~810M in 2025 (almost double)!!**



statista

Wunsch, N. (2020, November 25). Pea protein: Market value worldwide 2017-2027. Retrieved from <https://www.statista.com/statistics/1016958/value-of-the-global-pea-protein-market/%E2%80%8B>

**Ben & Jerry's has a significant international presence (in at least 35 countries)!**

Ben & Jerry's Homemade, Inc. (2020). 2015 SEAR Report: Ben & Jerry's. Retrieved from <https://www.benjerry.com/about-us/sear-reports/2015-sear-report>



 Pea-protein meat company Beyond has been trending up overall in the stock market this last year.



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# Flavor & Texture

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DAIRY-FREE ICE CREAM SURVEY QUESTIONS--34 Respondents	Yes	No
1.If prices were equal and it were easy to find, would you buy a dairy-free ice cream over a dairy ice cream (if both options offered the flavor you were looking for)?	22	12
2. Have you ever tried a dairy free ice cream before?	26	8
3. If you were trying a new brand of ice cream that you were really excited to check out, would chocolate be a good flavor to buy?	26	8
4. Have you ever heard of pea protein?	24	10
5. Have you ever eaten anything made of pea protein before (e.g., the Impossible burger, Beyond meat, Ripple ice cream)?	20	14
6. Do you eat ice cream often (per your definition of "often")?	17	17
7. Is finding a dairy-free ice cream option something that interests you?	18	16
8. Would you be interested in having a healthy ice cream option?	31	3
9. If you had a healthy ice cream option, would you eat ice cream more often?	26	8
10. Is it important for you to have sweets that don't have (simple) sugar in them?	15	19
11. If you had to pay a little bit more for an ice cream that was sweetened with healthy and natural sweeteners (e.g., stevia or a complex sugar), would you?	19	15
12. Did you know that Ben and Jerry's has a non-dairy ice cream offering?	24	10
13. Have you ever tried Ben and Jerry's non-dairy ice cream flavors?	16	18
14. Have you ever heard of Ripple ice cream?	10	24
15. Have you ever tried Ripple ice cream?	4	30

## The majority of initial survey respondents view healthy ice cream favorably:

- 91% are interested in a healthy ice cream option;
- 76% would buy ice cream more often if it were healthy;
- 76% have tried dairy-free ice cream;
- 71% are aware that Ben & Jerry's has a non-dairy ice cream offering.
- 71% have heard of pea-based protein;
- 65% would buy a dairy-free ice cream all else equal;

Janson, TA. (2020, November). Dataset derived from self-designed alternative ice cream survey

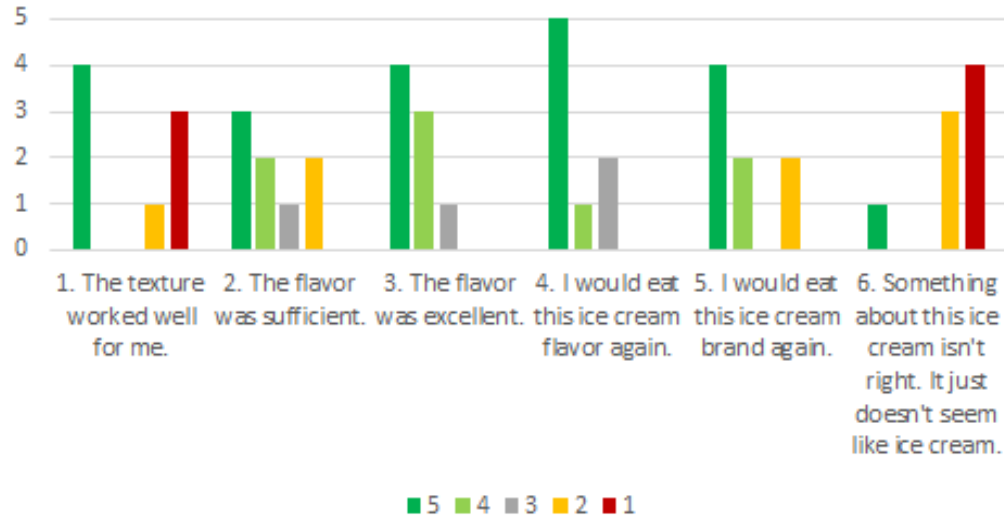


**76% of initial survey respondents agree that chocolate is a great flavor for ice cream.**  
**IRi data supports this, showing that chocolate is the **greatest-selling single flavor**.**

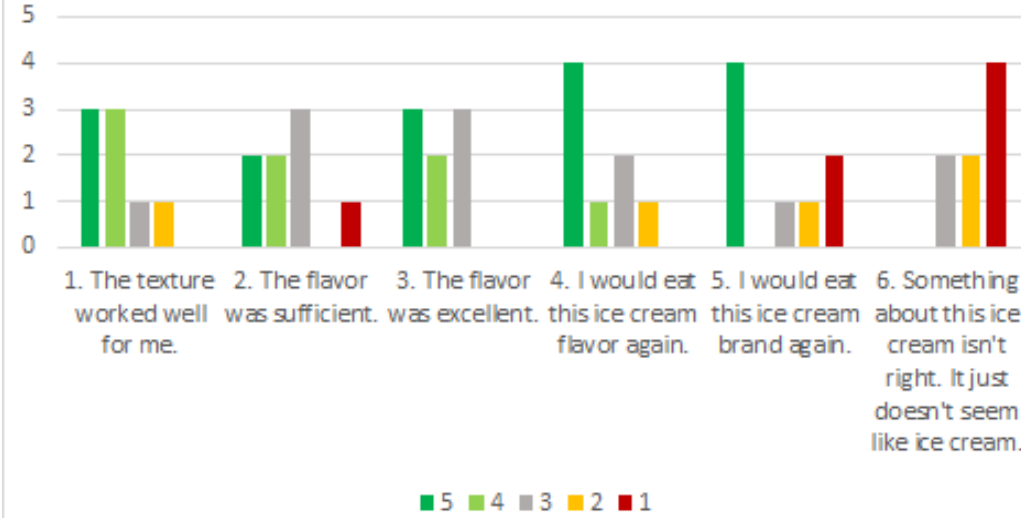




B & J (Almond Milk) Chocolate Fudge Brownie



Ripple (Pea-Based) Chocolate

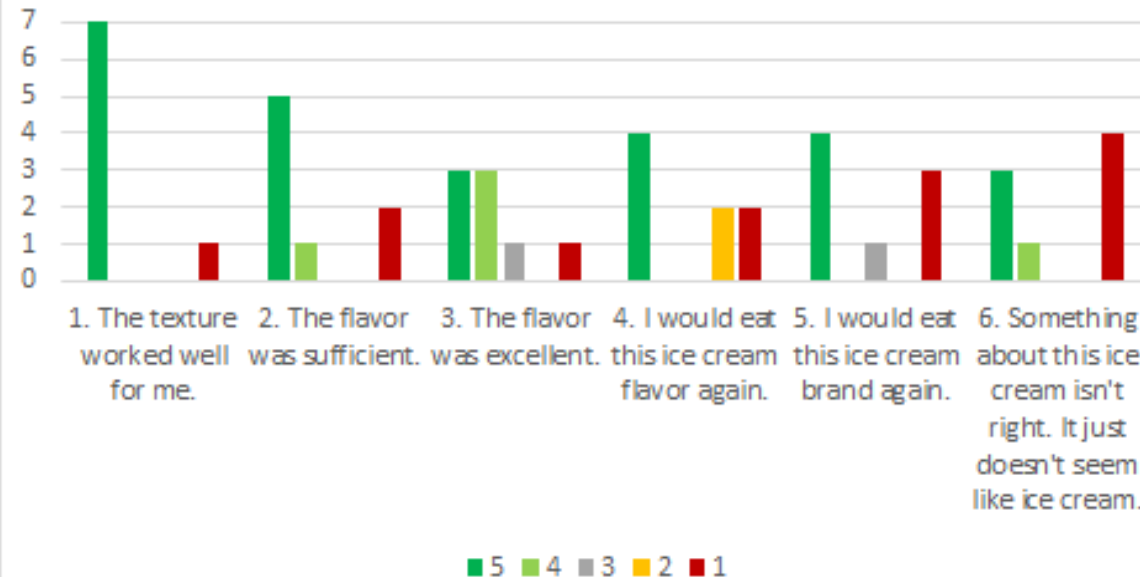


Eight-person  
"Chocolate" Ice  
Cream tasting survey,  
Thanksgiving 2020.

Column Color Key

	Fervently agree
	Somewhat agree
	Neither agree nor disagree
	Somewhat agree
	Fervently disagree

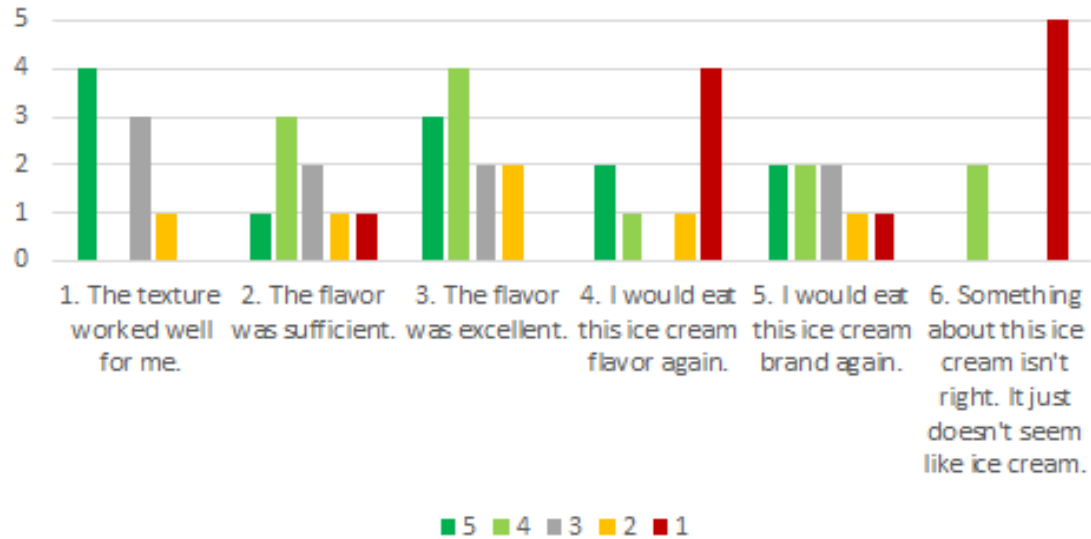
(Dairy) Purple Cow Death by Chocolate



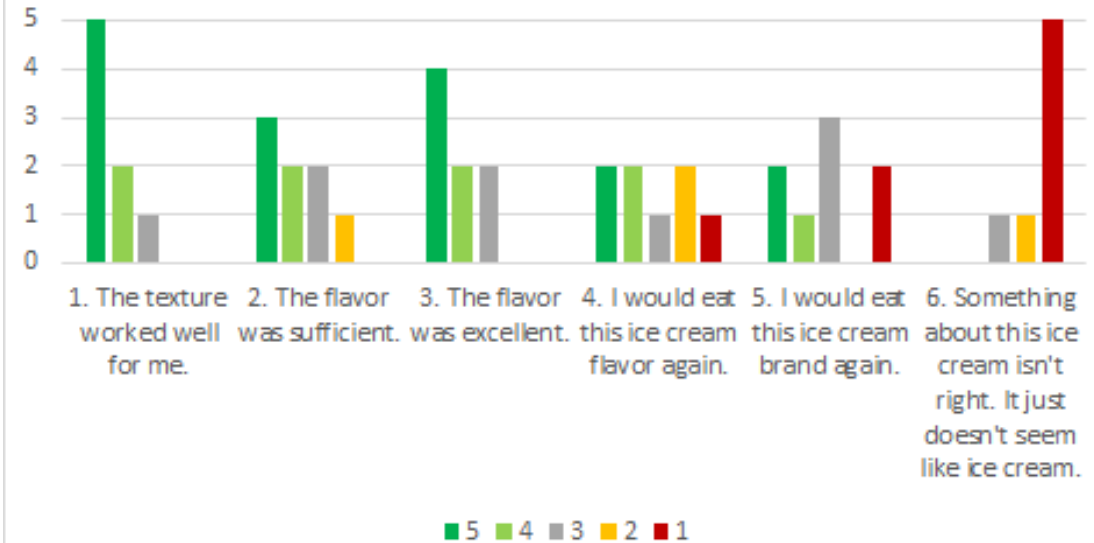
- Almond-based and pea-based ice creams performed comparably well in "excellent flavor", surpassing dairy.
- Ben & Jerry's (almond-based) and Ripple (pea-based) ice creams surpassed dairy in terms of projected repeat consumption.



### B & J (Almond Milk) Mint Chocolate Cookie



### Ripple (Pea-Based) Mint Chip



Eight-person "Mint Chip" Ice Cream tasting survey, Thanksgiving 2020.

Column Color Key

	Fervently agree
	Somewhat agree
	Neither agree nor disagree
	Somewhat agree
	Fervently disagree

### (Dairy) Dean's Mint Chocolate Chip



Pea-based "Mint Chip" ice cream performed best for texture and flavor when compared with similar almond-based and dairy options.

Janson, TA. (2020, November). Dataset derived from self-designed blind taste test,





## FURTHER RESEARCH

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- Panel and POS data from other countries that have health-conscious population and where Ben & Jerry's is already sold.
- Panel and POS data from Whole Foods (which lists 34 Ben & Jerry's pint flavors online in 2018), health food stores, stores with large health food sections and stores in states that have large health-conscious populations.
- Panel and POS data on Ripple Ice Cream.
- Clinical research on benefits of pea protein over nut-based protein.
- Clinical research on benefits of complex sugar alternative to simple (cane or beet) sugar sweetener.
- Stats for sales of pea protein products compared to other dairy and meat alternative products.

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Thank you!



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