Turning Taste into Trends: Data-Driven Revival for Conagra

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What's Holding Gardein Back?

◆ **Gardein's Challenge**

Despite offering a wide range of plant-based products, Gardein is losing ground. Consumers are reaching more often for other competitors —leaving Gardein with shrinking share and weaker brand recall in a fast-evolving market.

◆ **The Market Reality**

The plant-based category is no longer riding on novelty alone. With inflation tightening wallets and price sensitivity rising, consumers expect both taste and value—and they're more selective than ever. Gardein can't afford to blend into the freezer aisle.

◆ **Why This Project Matters**

What would convince a shopper to choose Gardein over better-known rivals? This project aims to uncover the flavor, promotion, and seasonality strategies that truly move the needle—helping Conagra reposition Gardein for stronger visibility, better alignment with consumer behavior, and ultimately, higher sales.

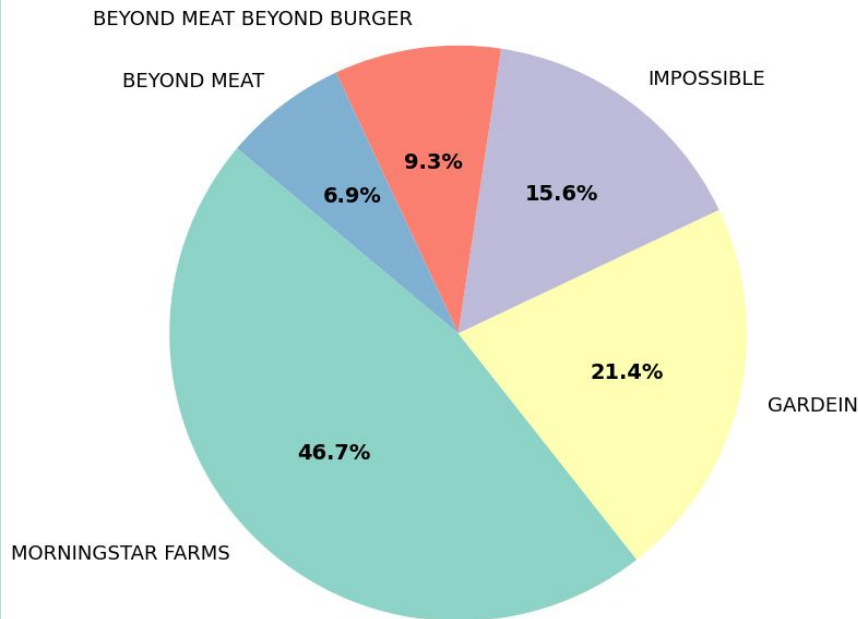# From #2 to #1? Bridging Gardein's Strategic Gap

Market Landscape Insight
Gardein is currently the #2 brand in the frozen plant-based meat segment, with 21.4% share. However, MorningStar Farms dominates nearly half the market, driven by strong mainstream positioning and established consumer base.

Strategic Gap
While Gardein outpaces newer entrants like Beyond Meat and Impossible, it lacks the brand recall, pricing flexibility, and promotional strength of MorningStar. Bridging this gap presents a key growth opportunity for Conagra.

Market Share by Brand (Total Dollar Sales)

- BEYOND MEAT BEYOND BURGER
- BEYOND MEAT — 6.9%
- 9.3%
- IMPOSSIBLE — 15.6%
- GARDEIN — 21.4%
- MORNINGSTAR FARMS — 46.7%

Consumer Insights Exploration

Uncovering Key Drivers of Gardein's Market Performance

Since consumer behavior, seasonal patterns, and marketing strategies significantly influence sales in the plant-based segment, our team aims to investigate the following questions to unlock data-backed growth opportunities for Gardein.

1. Which flavor profiles are driving the highest sales across the category?
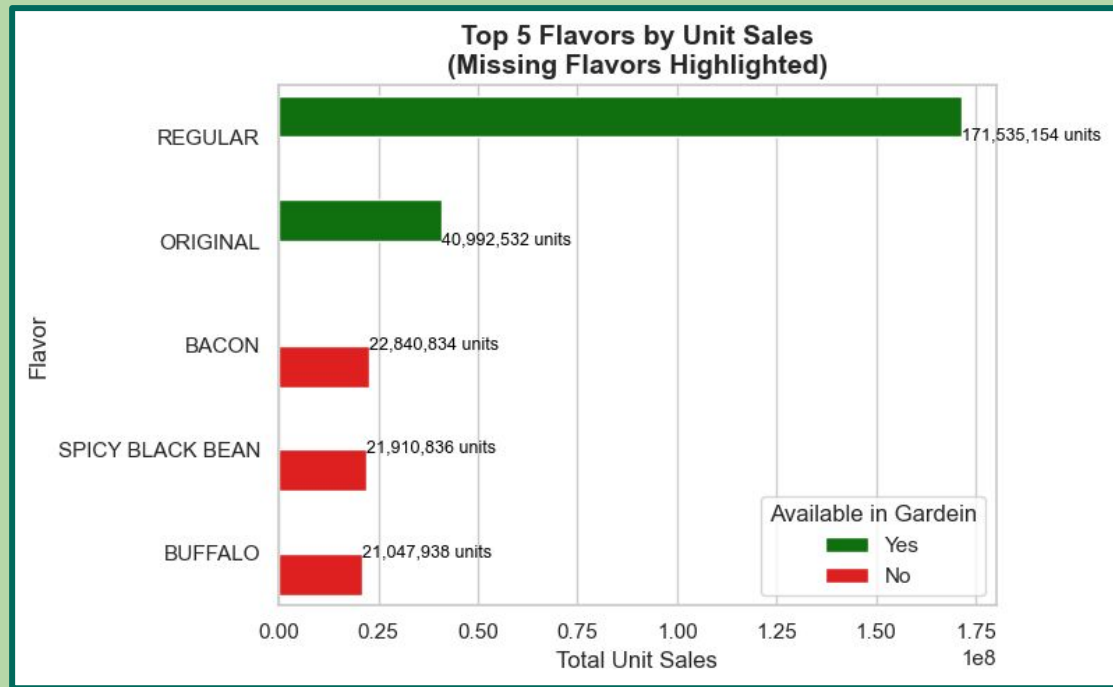
2. Which merchandising and promotional tactics deliver the strongest sales lift?

3. When are consumers most likely to purchase plant-based products?

4. How do flavor, promotion, and season interact to influence performance?

What's Missing from Gardein's Menu?

- The top 5 flavors in the category collectively drive over 275 million unit sales, but Gardein is missing 3 of them — Bacon, Spicy Black Bean, and Buffalo.
- These are not niche trends — they represent high-volume consumer preferences that competitors are capitalizing on.

Top 5 Flavors by Unit Sales
(Missing Flavors Highlighted)

REGULAR — 171,535,154 units

ORIGINAL — 40,992,532 units

BACON — 22,840,834 units

SPICY BLACK BEAN — 21,910,836 units

BUFFALO — 21,047,938 units

Flavor
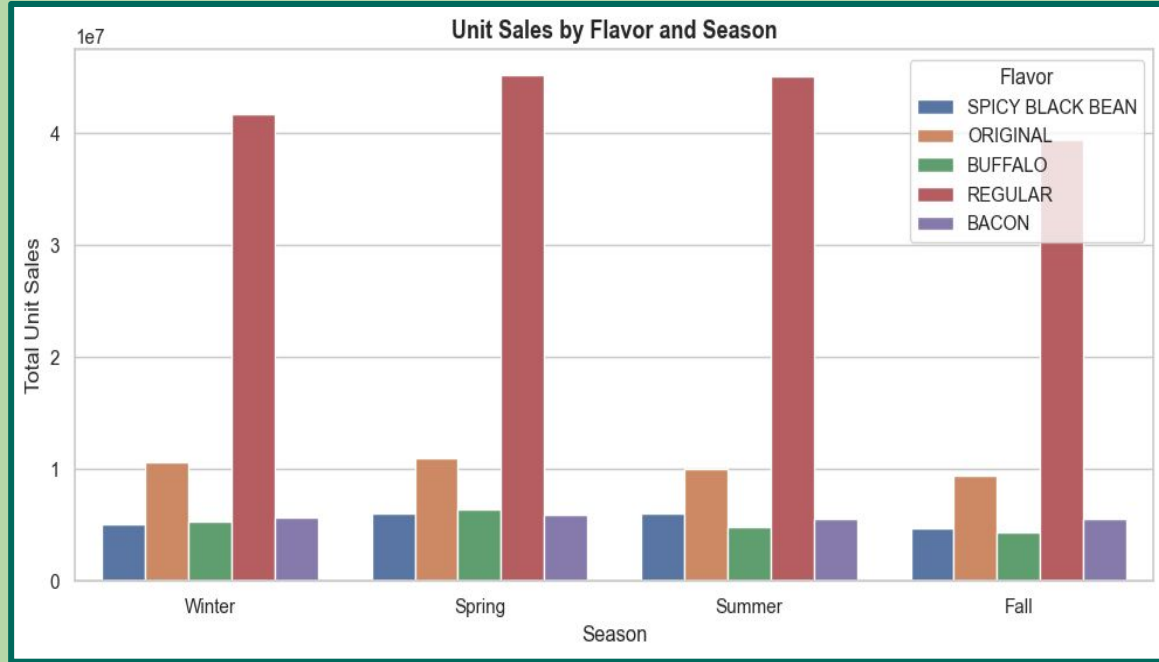
Total Unit Sales

Available in Gardein
- Yes
- No

Spring Flavor Surge – A Missed Opportunity?

Spring Surge in Flavor Demand
Sales for Original and Bacon
flavors spike in Spring, revealing a
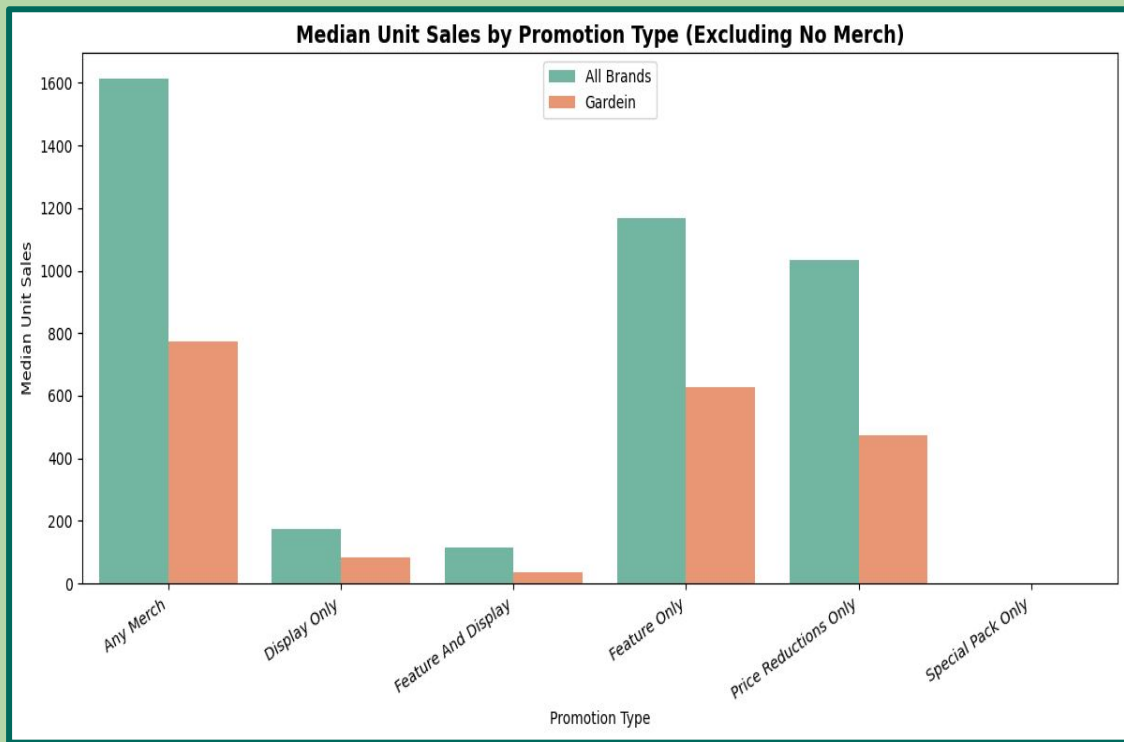seasonal opportunity.
Capitalize with:
- Targeted Spring promotions
- Limited-time bundles
- Flavor-focused in-store displays

Unit Sales by Flavor and Season

Numbers Don't Lie—Your Next Best Sellers Await!

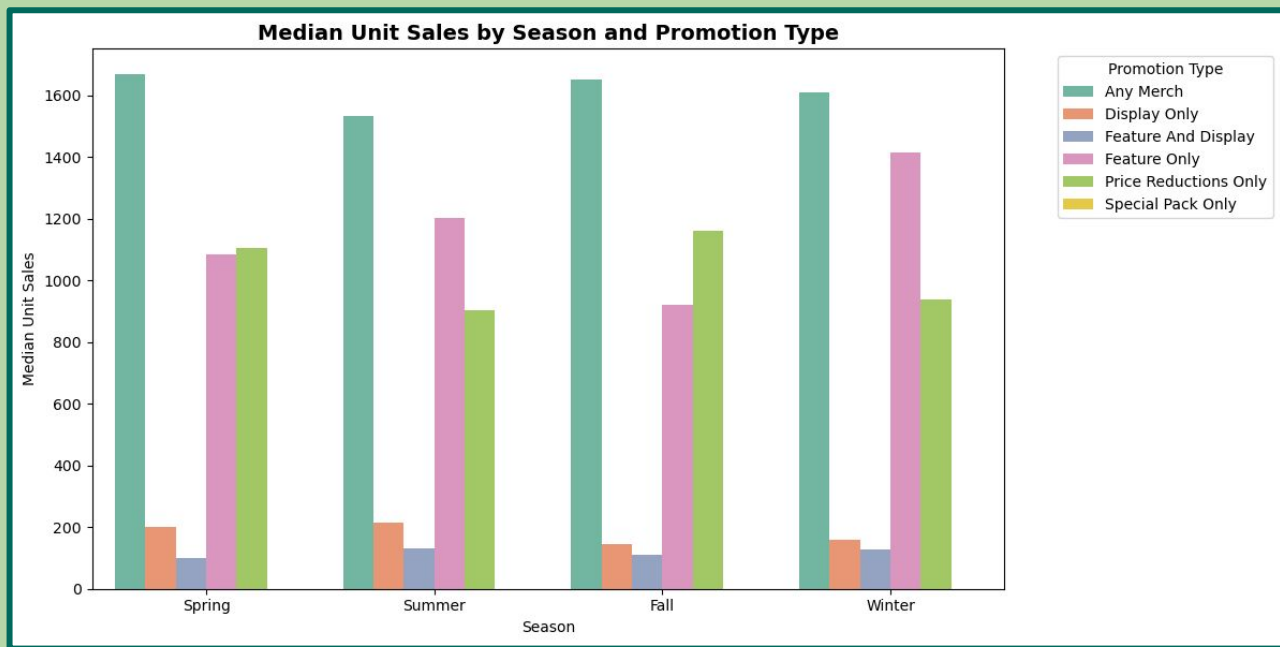Promotion Gaps = Missed Opportunities

- "Feature Only" and "Any Merch" drive high unit sales across the category.
- Yet Gardein consistently underperforms — often by $2\times$ or more — in these high-impact promotion types.

Median Unit Sales by Promotion Type (Excluding No Merch)

Timing Is Everything: Align Promotions with Seasonal Demand

- "Feature & Display" and "Price Reductions Only" generate the highest median unit sales in Winter and Spring, indicating strong seasonal responsiveness to these tactics.
- In Summer, "Feature Only" becomes the most effective standalone promotion.
- These patterns confirm that aligning promotional strategies with seasonal peaks can significantly boost product visibility, trial rates, and sales performance.

Promotional impact is not static — it shifts seasonally.

Median Unit Sales by Season and Promotion Type

Behind the Numbers: Key Factors Driving Unit Sales

To quantify the key drivers of product sales, we built a LASSO Regression Model incorporating individual and combined effects of flavor, season, merchandise, and category.

Mathematical Model Equation:

Sales per Unit = Flavor + Season + Merchandise + (FlavorCluster × Season) + (Season × MerchandiseCondition)

Main Effects: Sales are directly influenced by flavor, season, and promotion type.

Interaction Effects:

FlavorCluster × Season: Certain flavors sell better in specific seasons.

Season × MerchandiseCondition: Promo success varies seasonally.
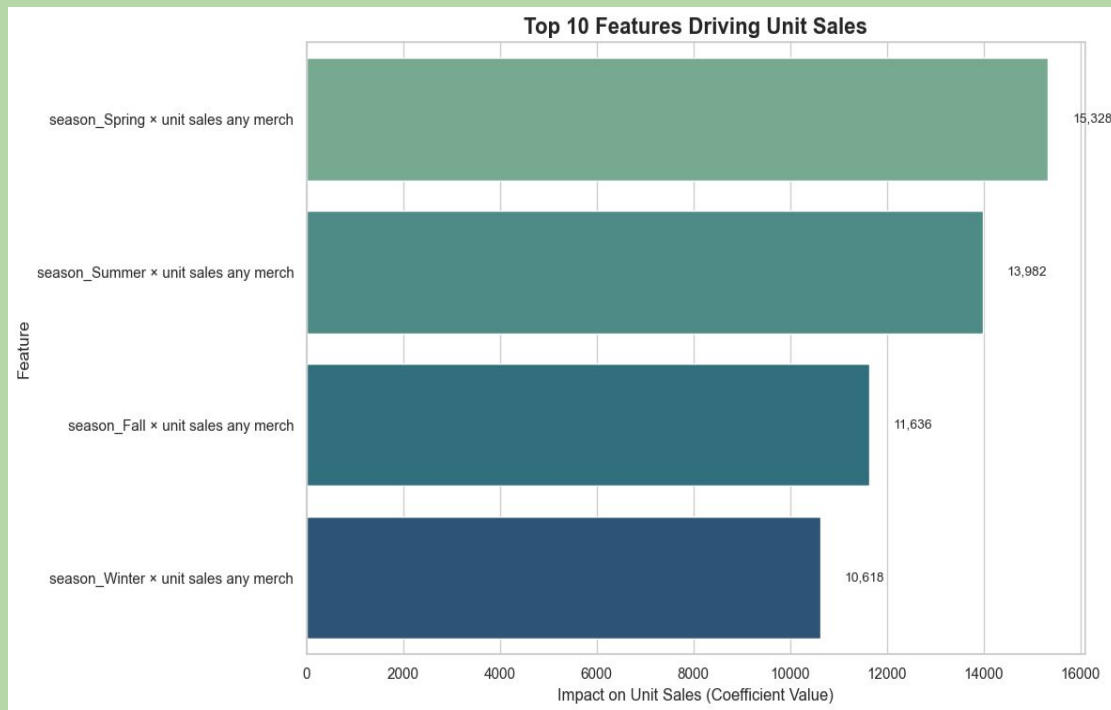
From Math to Meaning: Top Sales Drivers Revealed

Model Used: LASSO Regression (with cross-validation)

Training R² Score: 0.88

Test R² Score: 0.87

Adjusted R² Score: 0.85

The model captures 85% of the variation in unit sales

Top 10 Features Driving Unit Sales

Feature	Impact on Unit Sales (Coefficient Value)
season_Spring × unit sales any merch	15,328
season_Summer × unit sales any merch	13,982
season_Fall × unit sales any merch	11,636
season_Winter × unit sales any merch	10,618

Accelerating Gardein: Predictive Levers for Market Leadership

"What's Cooking? The Next Viral Flavor."

"The Classic You Love + A Surprise You'll Crave"

"Win the Aisle Before the Cart: Make Gardein Unmissable Where It Matters Most."

"Smart Eating Starts with Gardein."

"Spice It Up with a Twist: Gardein x [Hot Brand] = Sizzle on Every Shelf."

"Gardien is poised to lead with insight-driven innovation, bold merchandising, and precise pricing - turning today's market shifts into tomorrow's leadership wins"

Thank You

Thank you for the opportunity to shape the future of Gardein.

This journey wasn't just about building a strategy — it was about unlocking leadership in the plant-based movement.

With bold flavors, data-driven focus, and consumer-first thinking, With bold moves now, Gardein won't just grow — **it will lead**.

Let's open the floor — what questions can we answer?