

2026: New Product Competition

Developing Innovative,
Dairy-Based Products
for Health & Wellness
Consumers

The statements made and information provided in the current and subsequent slides are based on consumer insights and cannot be used to make product claims. Claims must be truthful and not misleading, supported by scientific data and aligned with regulations in the current marketing environment.



DISCLAIMER

THE USE OF BRANDS AND IMAGES OF BRANDED PRODUCTS IS INTENDED ONLY TO PROVIDE EXAMPLES OF CONCEPTS BEING DISCUSSED, AND DOES NOT IMPLY ENDORSEMENT OF ANY BRAND OR PRODUCT

2026 New Product Competition

Develop a modern, dairy-forward product for consumers concerned with their BMWs:

- **B**one Health
- **M**uscle Health
- **W**eight Management

Your innovation may target just one or all three of the health and wellness conditions above.

For more details, see competition rules and guidelines here: <https://www.usdairy.com/research-resources/new-product-competition>

Target Consumer:

Who is the BMW consumer?

“BMW” Consumer

“I pay attention to what I put into my body so it continues to perform the way I want. I seek out foods and beverages that help me reach my goals so I can keep doing the activities I enjoy.”



Source: DMI Strategic Intelligence

Note: This information provides consumer insights and cannot be used to make product claims. See disclaimer on first slide.

Target Consumer:

What benefits do they seek?

The “BMW” consumer looks for these primary benefits:

Bone Health	Muscle Health	Weight Management
<ul style="list-style-type: none">▪ Keep bones strong▪ Maintain bone density	<ul style="list-style-type: none">• Help build muscles• Improve athletic performance• Help muscles recover	<ul style="list-style-type: none">▪ Help losing weight▪ Help maintaining weight▪ Help improving metabolism



Dairy + the Bone Health, Muscle Health & Weight Management consumer?

Visit usdairy.com/dairy-nutrition to see how dairy plays a role in these health and wellness benefit areas consumers are looking to treat and/or prevent.

Source: DMI Strategic Intelligence

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Target Consumer:

What are they using now and why?

Top Foods & Beverages to Address Goals*:

Bone & Muscle Health



Milk, Eggs



Protein Shakes



Protein Bars

Weight Management



Fresh Fruit &
Vegetables



Leafy
Vegetables



Nuts



Yogurt

Top Product Attributes*:



Nutritional
Value



Taste



Ingredient
Quality

*Top foods used to address a health objective with 120+ index; + *Attributes assigned 1,2 or 3 ranking (on 7pt scale); 1 = most important attribute for deciding what to eat & 7 = least important attribute for deciding what to eat

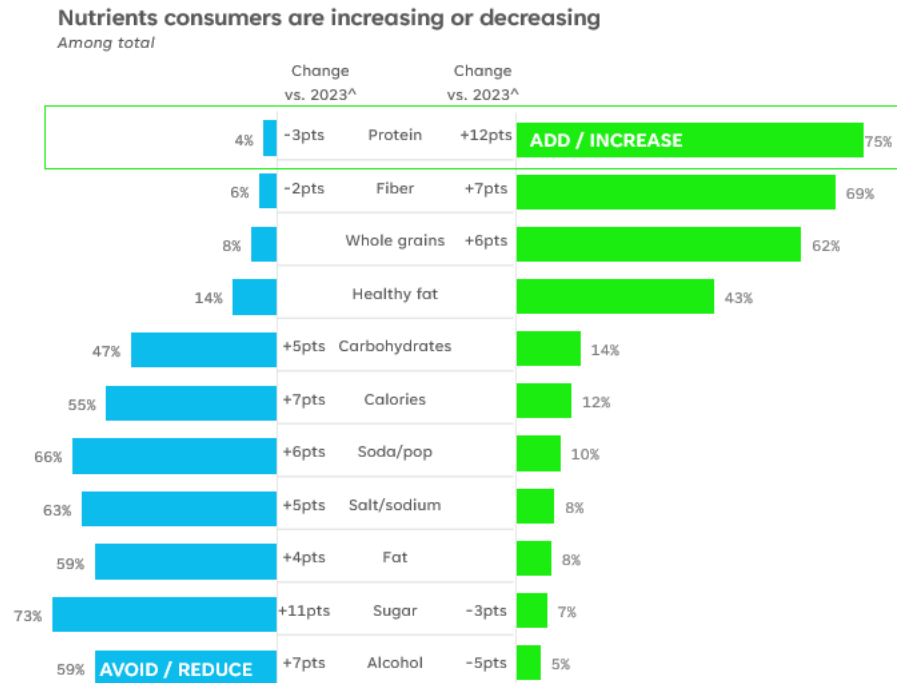
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Source: DMI Strategic Intelligence

Trend: Vitality and Longevity are Inextricably Linked

With rising average lifespans and a more sophisticated approach to wellness, longevity is being redefined as “vitality span”. A greater percentage of consumers are actively adding and avoiding various nutrients in the interest of vitality and longevity.

- 81% of consumers agree maintaining a **high level of VITALITY** is important to me
- 72% of consumers agree the desire for **LONGEVITY**, living a healthier life for longer, plays a big role in my lifestyle today



^Statistically significant change vs. 2023.

Source: Hartman Health & Wellness Report 2025; DMI Strategic Intelligence

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Trend: Protein for Baseline Performance

Protein is evolving beyond fitness into an everyday performance nutrient. Consumers now view protein-enriched foods as essential for sustained energy, daily vitality, metabolic health and anti-aging, muscle boosting – driving mainstream adoption across food and beverage categories.

- 71% U.S. adults are seeking to **add or increase their protein** in 2024, up from 59% in 2022 ¹
- **High protein snacking** is a trend, with 63% of people consuming a high protein snacks at least weekly²



Source: DMI Strategic Intelligence

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Trend: GLP-1 Agonists and Impact on Food & Beverages

As the barriers of accessibility, availability and affordability continue to fall, GLP-1 will leave its mark on consumers' total well being. Some predictions have GLP-1s growing to a market size of \$100 billion by 2030.

- 82% of American adults are engaged in some form of weight management¹
- By 2035, 7% of individuals and 13.6% households are projected to be using GLP-1²
- GLP-1 users are eating less food overall, smaller portions and seek nutrient dense foods

Companies creating GLP-1 specific food and beverage solutions



Source: ¹Mintel, ²Circana, DMI Strategic Intelligence, Vital Pursuit, Boost, Healthy Choice, Smoothie King/Dairy Foods Magazine.

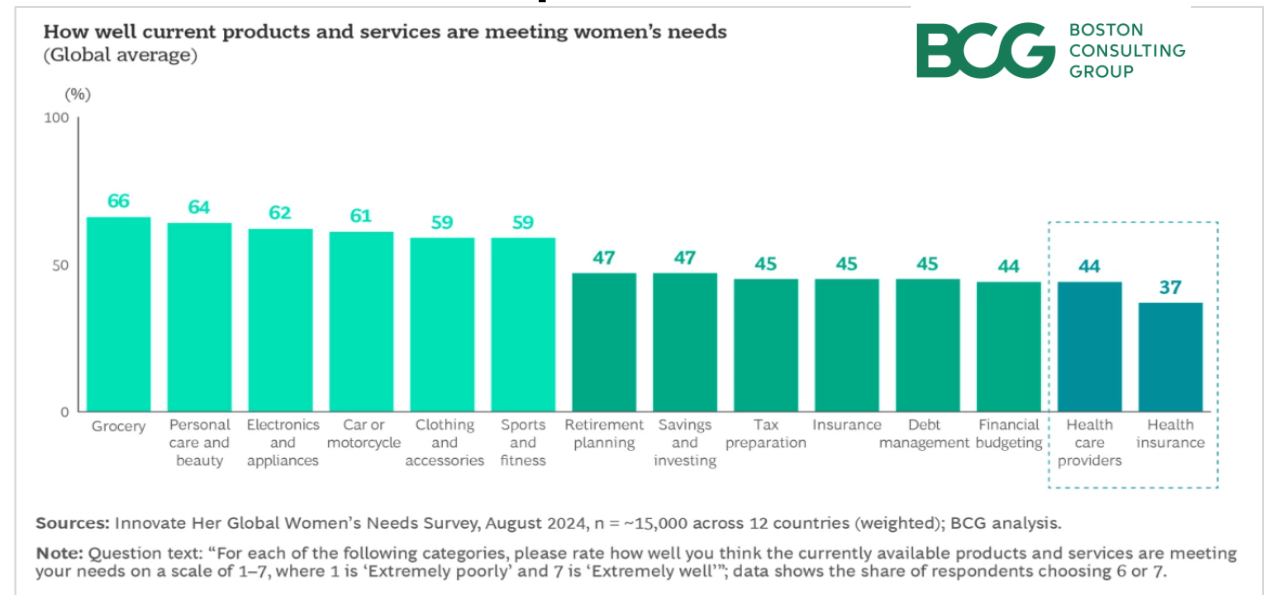
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Trend: Demand for Women's Health Solutions Remains Unmet

Culture is moving away from sweeping stigma laced conditions under the rug and putting them directly into the light. Women need different messaging, different products (with different nutrition), and different resources at each life stage.

- Control **75% of discretionary** spend
- Are **3X** more likely than men to **miss** hitting their **protein** needs
- **Significantly** more **seek** weight management **solutions vs men**
- Bones **build slower** and **decline faster**¹

Despite managing \$31.8 T in global spending, women don't feel products meet their needs



Source: [The Boston Consulting Group - The \\$32 Trillion Opportunity in Women-Focused Products and Services](#); DMI Strategic Intelligence; ¹ May 2024 AlgaeCal References: www.ncbi.nlm.nih.gov/books/NBK109827/
www.niams.nih.gov/Health_Info/Bone/Osteoporosis/bone_mass.asp

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Market Inspiration

“A quick protein pick-me-up with 10g protein, 0g added sugar, and vitamins B2, B6, and B12”



“A protein smoothie packed with real fruit and veggies, almond butter, collagen, 12g of protein, and lions mane mushroom.”

“Multigrain cereal helps build and maintain strong bones with an excellent source of Vitamin D and Calcium in every serving.”



“A unique combination of protein, net carbs and sugar with a focus on carefully selected ingredients to keep you going throughout the day.”



“Great tasting, on-the-go Vitamin D3 to aid the immune system, muscles and bones.”



“Creamy frozen Greek yogurt dunked in a chocolate, crunchy, quinoa-crisped shell.”



“The first real food calcium chew made from 4 real foods with highly bioavailable calcium, vitamin D, phosphorus, magnesium, and protein for better bone health.”



“Creamy, indulgent milkshake-like satisfaction for a delicious protein boost anytime.”



“High-protein drinkable oatmeal”

Source: [Oikos](#), [Seën](#), [Reup](#), [Quest](#), [Life](#), [zooki](#), [oats overnight](#), [ratio](#), [Yasso](#),

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- Consumer perception of different product “benefits” may differ from the scientific and regulatory views.

For example:

- The regulatory definition of “energy” is calories (food energy).
- The regulatory definition of “healthy” is defined. Additionally, FDA is providing enforcement discretion here.
- “Natural”/“All Natural”/“Made With Natural Ingredients” is not defined, but is being reviewed by FDA. A cautious approach is recommended.

- Products in the marketplace convey “benefits” in a variety of ways including by product name, ingredients or images.

Therefore

- ✓ Substantiation of product benefits must include support for all express and implied claims
- ✓ The substantiation must be truthful and not misleading and include a review of the totality of the scientific evidence and reflect the strength of the science at the time the claim is made
- ✓ Substantiation may include proprietary (non-public) research results
- ✓ It is advisable to seek the advice of counsel before making claims
- ✓ For further considerations, please see this link

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