

Better-for-You Tortillas



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OBJECTIVE & TOPICS



OBJECTIVE:

Inspiration for Innovation in Better-for-You

TOPICS:

- Market Landscape & Consumer Attitudes & Drivers
- Innovation – What, Why, How?
- Zoom In For Awareness A New Ingredient Innovation

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There is a growing emphasis on **health-conscious** consumption. The drive for convenience, variety, and taste – continue to reign.

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Better-for-you Driving Premium Sales Growth

Better-for-You Tortillas

Growing at **7.6%** CAGR, outpacing the 5.3% growth of the total tortilla market¹.

Sources: 1) [grandviewresearch.com](https://www.grandviewresearch.com) and [marketresearch.biz](https://www.marketresearch.biz) 2) [Snackandbakery.com](https://www.snackandbakery.com)



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**Better-for-you Driving
Premium Margins**

Average retail selling price
2X higher
than conventional tortillas.



Sources: 1) [grandviewresearch.com](https://www.grandviewresearch.com) and [marketresearch.biz](https://www.marketresearch.biz) 2) [Snackandbakery.com](https://www.snackandbakery.com), (\$1.11 vs. \$0.53 per ounce, a +109% price premium).



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**Better-for-you High Protein,
Fiber-Rich, and Low-Carb
Driving Growth**

Consumers actively seek high-protein or fiber-rich tortilla options, with **double-digit growth** in the **low-carb** segment².



Sources: 1) [grandviewresearch.com](https://www.grandviewresearch.com) and [marketresearch.biz](https://www.marketresearch.biz) 2) [Snackandbakery.com](https://www.snackandbakery.com), logos shown owned by their respective owners, shown for illustrative purposes only



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+ High or Added Protein

+112%



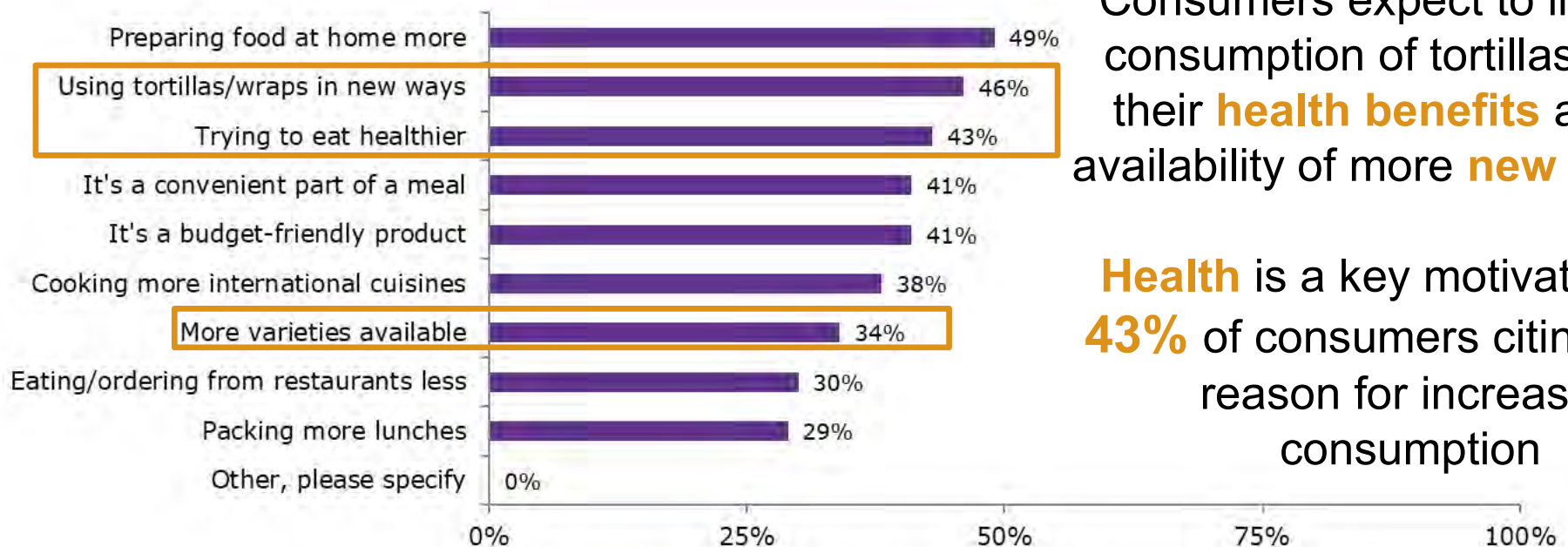
+ Vitamins & Minerals

+183%

Source: Mintel GNPD. Change Over Time of Top Functional/Plus Claims for NA Tortillas (Jan 2020-December 2024)



Consumer Interest in Tortilla Features and Benefits



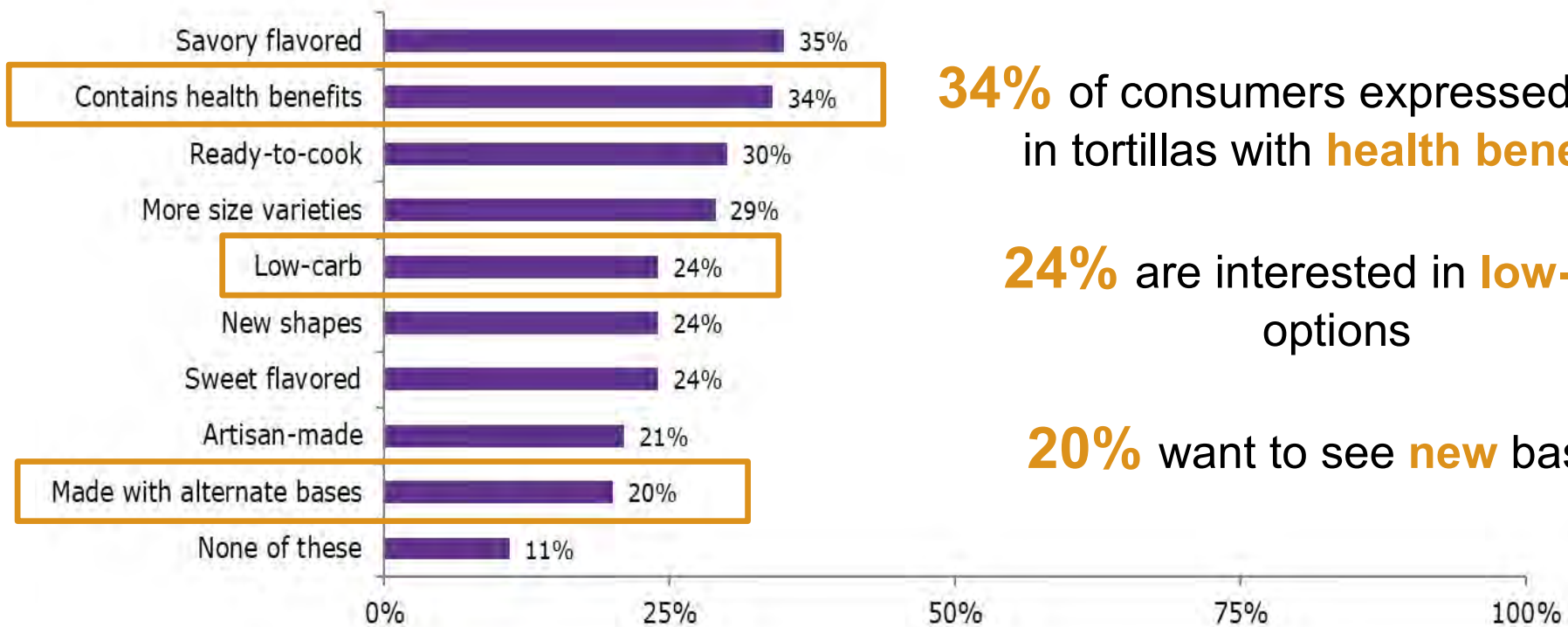
Consumers expect to increase consumption of tortillas due to their **health benefits** and the availability of more **new options**.

Health is a key motivator, with **43%** of consumers citing it as a reason for increased consumption

Source: Mintel's Global Consumer, March 2023 n=: 446 internet users aged 18+ who anticipate increased household tortilla or wrap consumption, Why do you anticipate your household will eat more tortillas/wraps in the next 12 months?



Consumer Interest in Tortilla Features and Benefits



34% of consumers expressed interest in tortillas with **health benefits**

24% are interested in **low-carb** options

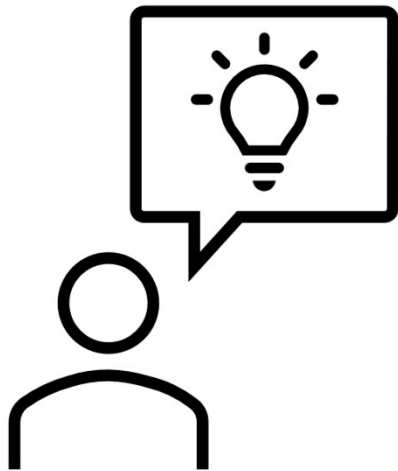
20% want to see **new** bases!

Source: Mintel's Global Consumer, March 2023 n= 1,811 internet users aged 18+ who used tortillas or wraps in the past six months, Which of the following types of tortillas/wraps are you interested in seeing more of at the store?

INNOVATION



Yeah, but *what*
aspect of innovation
to focus on?



Have to think about:
Consumer Positioning and Labeling
Sustainability
Cost
Share of Shelf
...and more!

INNOVATION



Today We'll Look At Solutions Related To:

Protein

Fiber

Plant-based

Lower Carb

Great Flavor but *with* benefits

INNOVATION: 3 TYPICAL APPLICATION CHALLENGES



Dough Characteristics

- Processability
 - Stickiness
 - Dry / brittle
- Gluten development
- Moisture Content
 - Shelf life
- Processing conditions



INNOVATION: 3 TYPICAL APPLICATION CHALLENGES



Eating Characteristics

- Texture
 - Softness / rollability / flexibility
 - Fluffy – not gummy or sticky
- Flavor
- Shelf life



INNOVATION: 3 TYPICAL APPLICATION CHALLENGES



Nutritional Considerations

- Protein
- Fiber
- Specific dietary needs



PROTEIN TO INNOVATE & RENOVATE



Protein For Tortilla Bases

- Plant proteins
- Animal Proteins
- New & Novel



CONSIDERATIONS WITH PROTEIN



- Protein quality
- Sodium content
- Allergens
- Production
- Dough consistency
- Water activity
- Taste & texture



FIBER TO INNOVATE & RENOVATE



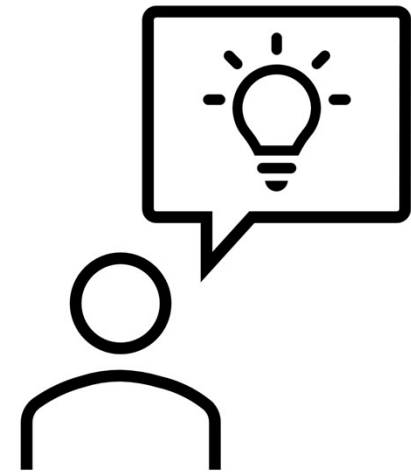
- Dietary fiber (soluble vs insoluble)
- Net Carbs (total carbs – dietary fiber = net effective carbs)
- Low Carbohydrate / Keto Friendly





GENERAL CONSIDERATIONS

- Regulatory status
- Certifications for your brand (organic, Gluten Free, Non-GMO, Kosher, Vegan, etc.)
- Labeling
- Target market (shelf stable, premium, refrigerated, etc.)





CASE STUDY & NEW LAUNCH

*"I am a protein-centric consumer and tend to avoid carbs whenever possible. When I eat Mexican, I typically skip the tortilla. Now I don't have to. **It tastes and bites like an authentic flour tortilla.**"*

- Donna Berry

NEW

The tortilla wrap that has it all

- 7g of protein, 4g of fiber, low net carbs
- No compromise on taste or texture
- Soft and flexible – just like a classic flour tortilla



A no-brainer choice

When you can enjoy the **same great taste and texture** – but with **2x the protein, 2x the fiber and 3x fewer net carbs** than a regular flour tortilla, why settle for less?



**Let's work together to make the planet a better place for everyone,
now and for future generations!**

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