

# Protein powers onwards

NewNutrition  
Business



# About New Nutrition Business

- New Nutrition Business is a **specialist provider of strategic and market insights into the business of food, nutrition and health.**
- Based in the UK, **we do 90% of our business in mainland Europe, Asia and USA.**
- **We interview more than 600 senior executives**, worldwide, in foods, beverages and ingredients every year, giving us an informed, first-hand, global view of what works, what doesn't work - and why.



# 5 MEGA-TRENDS & 10 KEY TRENDS 2025



# Content

1. Some mega-trends
2. Animal protein
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4. Emergent opportunities: “new proteins”, GLP-1, blood glucose management

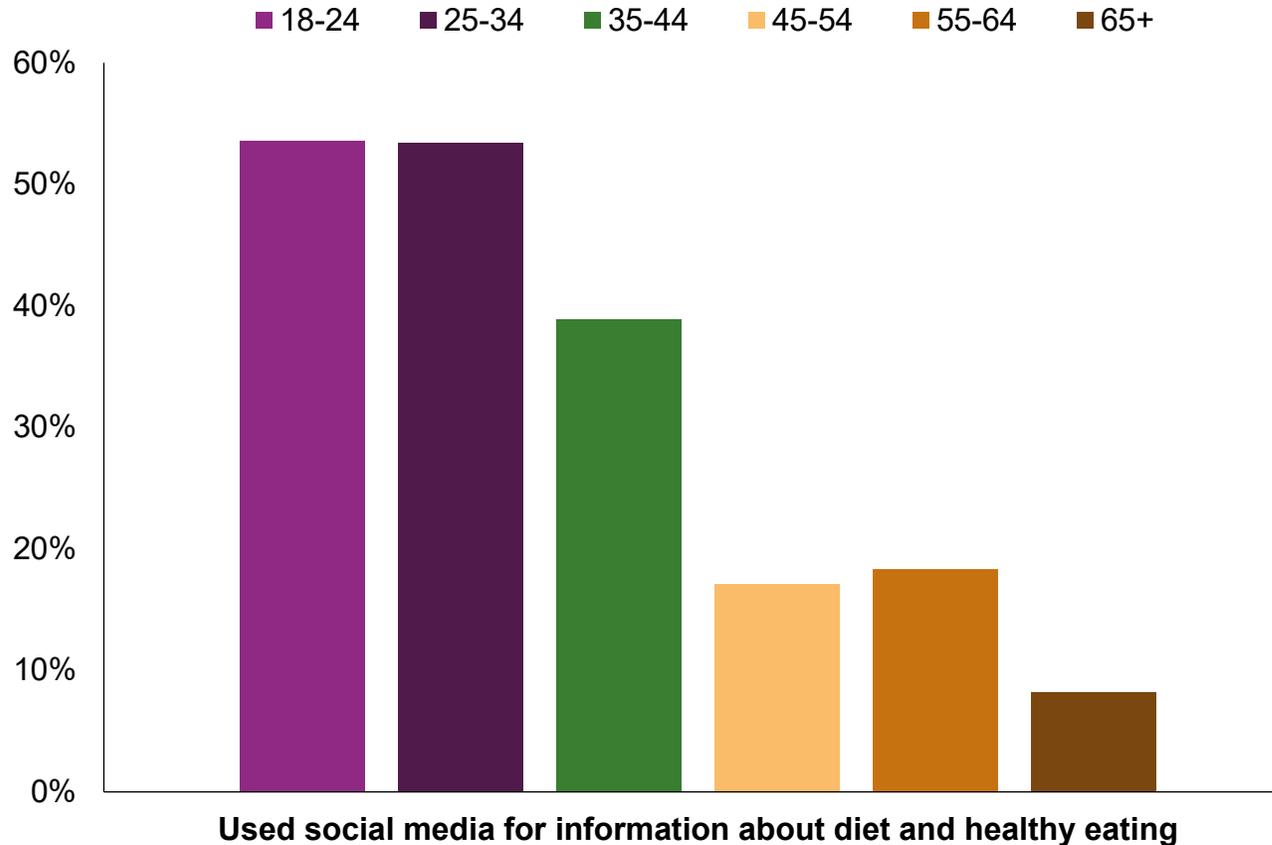
# Mega-trends

# The growing diversity of consumers' beliefs about food, nutrition & health is one of the most far-reaching Mega-Trends

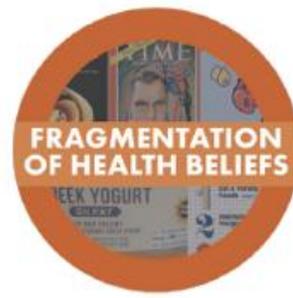


**For younger consumers, social media is mainstream media**

**“When you want to know more about food and health, which of the following have you used in the past 6 months?”**



# Declining faith in experts thanks to changing and often contradictory messages has helped drive fragmentation of beliefs



## Are eggs good for you or not?

By American Heart Association News



Is dairy bad or good for you? New study has surprising results



FOOD & DRINK

## No Shock Here: Lose Weight by Eating Less Fat



HEALTH & FITNESS

## Why Experts Now Think You Should Eat More Fat

## Experts change their minds...



“The guidelines maintain an unfounded hostility towards saturated fats, ignoring the last decade’s worth of evidence challenging their link to heart disease.

“Failure to update this science has meant the continued unjustified demonization of nutrient-dense foods such as eggs, meat and full-fat dairy, which together play a crucial role in a healthy diet.”

*Source: Janet C. King, PhD, Professor Emeritus of Nutritional Sciences at Berkeley University, Chair of the 2005 Dietary Guidelines Committee*

# Mega-Trend: sustainability is part of every company's strategy.

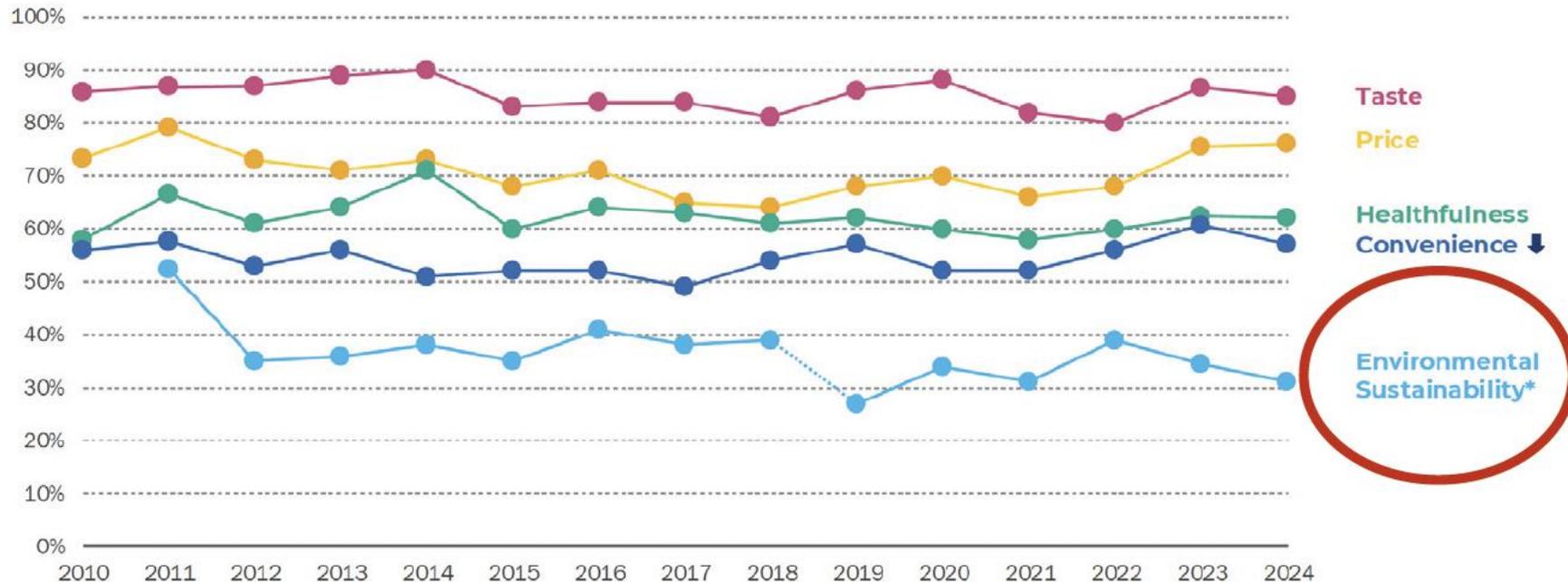


Taste and price consistently outrank sustainability as purchase drivers of foods & beverages

## USA

## EU

Food and Beverage Purchase Drivers Over Time  
(% reporting impact of 4 or 5 out of a 5-point scale)



2024 survey of 19,642 consumers in 18 European countries by the European Institute of Innovation and Technology (EIT), found **only around 50% of Europeans claim to consider the sustainability of what they eat.**

EIT's Report shows a **significant decline in consumers' intention to eat sustainably from 2020 to 2024**

Source: IFIC survey

# Key trends



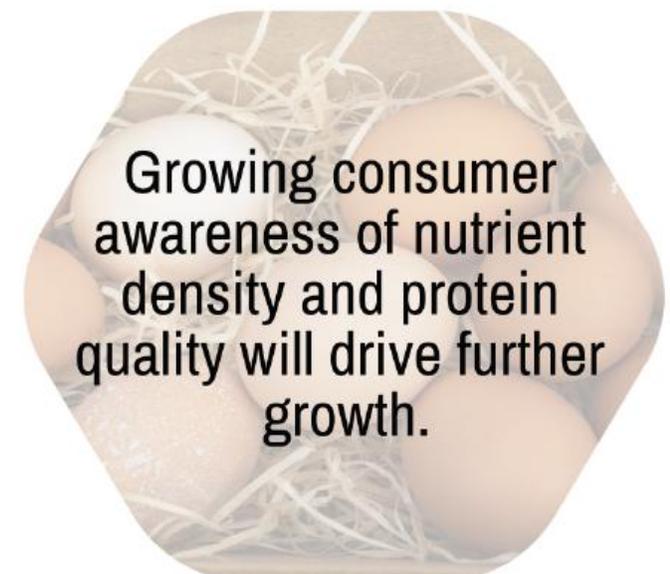
# ANIMAL PROTEIN POWERS ON



Worldwide demand for animal protein, particularly dairy, is strong and growing.

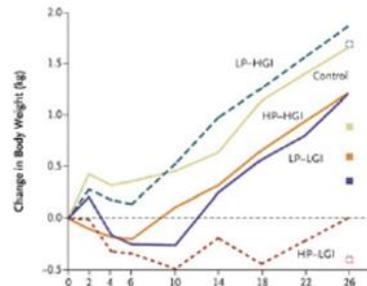
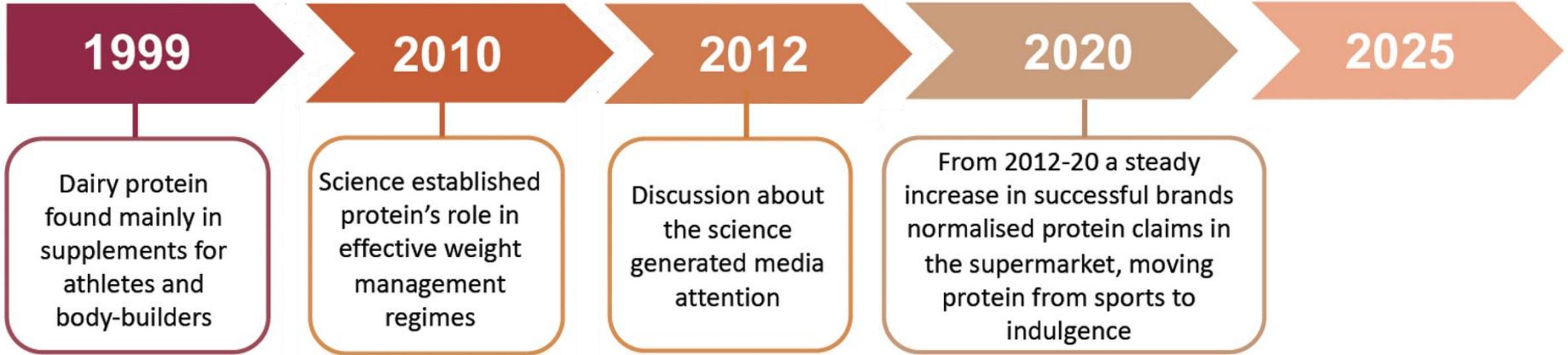


Leading-edge consumers are embracing meat-based products with compelling benefits.



Growing consumer awareness of nutrient density and protein quality will drive further growth.

# DAIRY HAS BEEN THE LEADER IN CONSUMER INTEREST IN “MORE PROTEIN”



## 18 Delicious High-Protein Foods That'll Help You Lose Weight

### Everything To Know About Eating A High Protein Diet For Weight Loss

RDs explain how much protein you should eat per day and what the best sources are.



# Protein Power Up

US supermarket chain Whole Foods Markets says:

***"Consumers are looking to incorporate more protein in their diet...with an emphasis on ramping up protein consumption at meal-times and with 'whole food' snacking...with consumers now prioritising animal protein."***



- ✓ 2024 cottage cheese sales in Sweden, UK up by 30%.
- ✓ Quark up 30% in Europe. Arla building a new factory to handle demand.



**Spain:** biggest white cheese brand adds a protein message and gets 12% growth in 2024



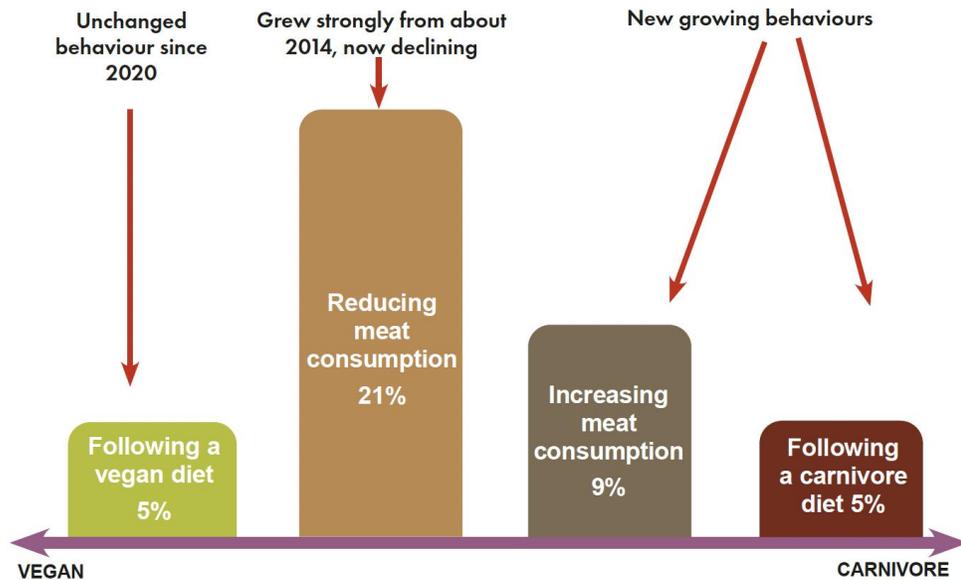
**Fage** biggest Greek yogurt brand in Europe.

2024 sales up 40% in UK to \$130 million



**Europe:** Ehrmann puddings became an €600 million brand with high protein+low sugar+ great taste

# Red meat is back, driven by Gen Z

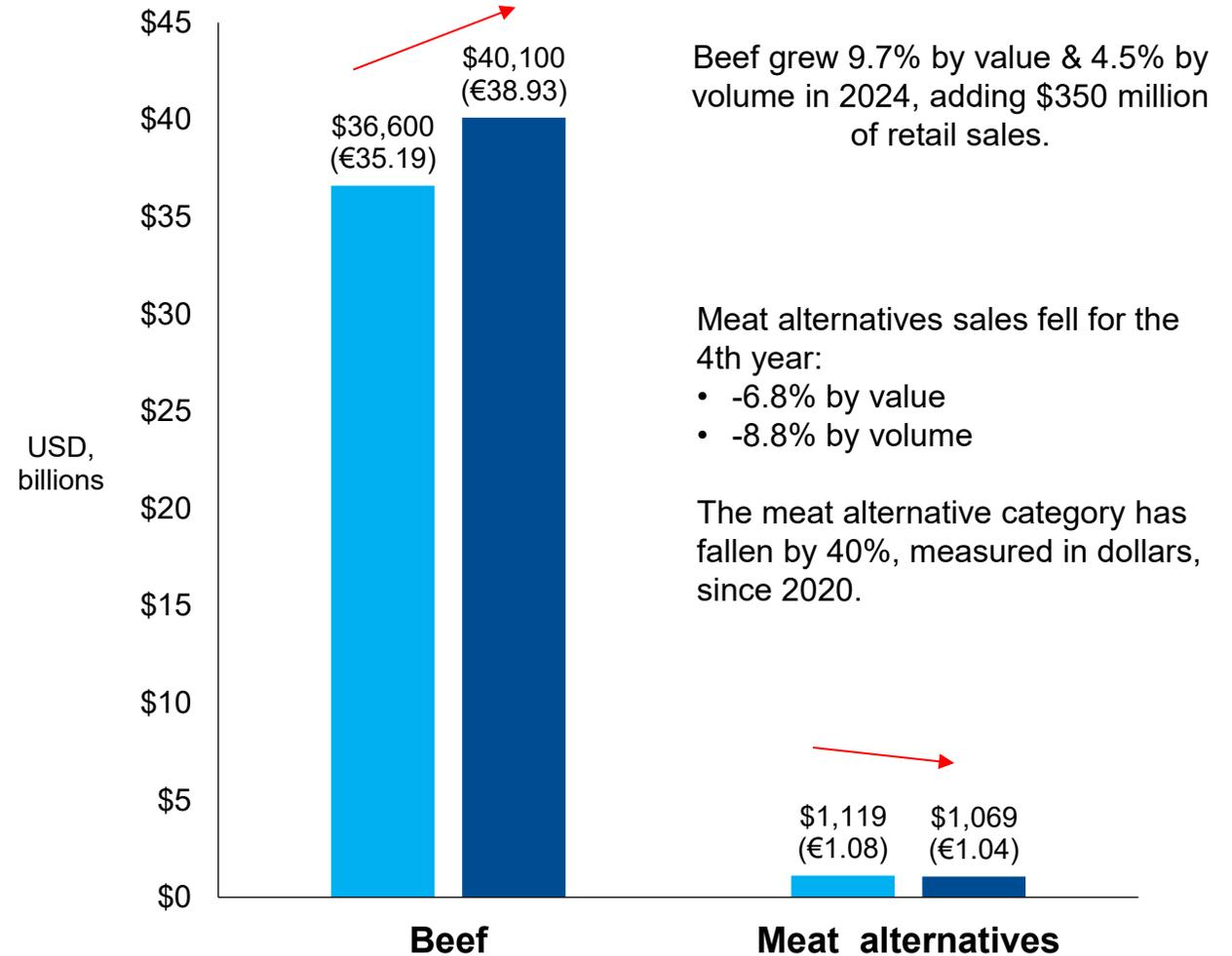


Source: NNB 5-country consumer survey

Animal protein quietly gaining among younger consumers.

Meat consumption among young men increasing in most countries: Spain (8%) and Sweden (20%).

## Beef sales up in US



Source: Circana supermarket data

# The diversity of beliefs is illustrated by the shifting approach to meat consumption



Chart 3: % of consumers reducing meat consumption

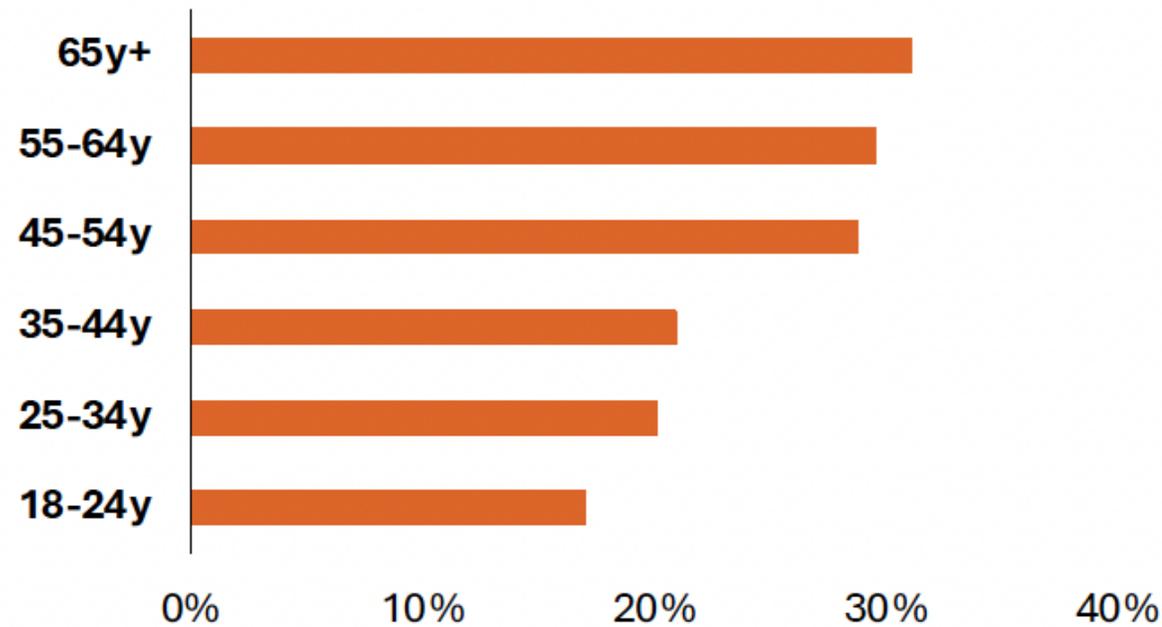
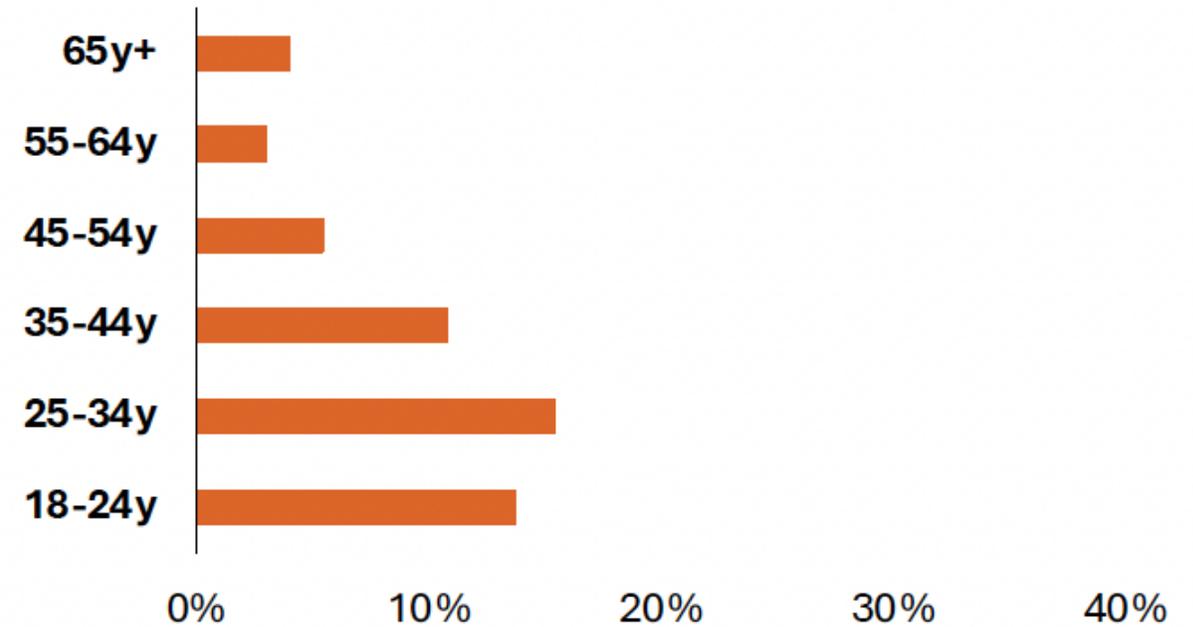


Chart 4: % of consumers increasing meat consumption



Source: NNB 5-country consumer survey

# Consumers' increasingly seek convenient animal protein

Launched in 2013, by 2023 the **Chomps** brand had hit \$245m in sales and was expected to reach \$400m in 2024.

7th fastest-growing consumer brand in America in 2023. Grass-fed meat snacks, free from nitrates and sugar, the brand's main market is women aged 25-45 – who accounted for 70% of sales until recently.



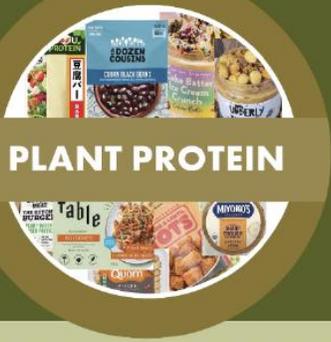
**FUEL FOR YOU AND ALL YOU DO**

**PROTEIN PORTIONS FOR EVERY OCCASION**

Big or small, we've got it all. Our full-size sticks power even the busiest days, while our mini Chomplings give you that much needed final mile fuel.

# So strong is the desire for protein...





PLANT PROTEIN

# PLANT PROTEIN

## Plant proteins benefit from:

- ✓ A naturally functional health halo
- ✓ A stream of positive attention on social media
- ✓ A positive back-story of traditional usage

Consumers enjoy both animal & plant proteins



## Traditional food reinvented

With tofu consumption declining in Japan, leading maker Asahico created the tofu bar.

*Simple ingredients, extreme convenience, interesting flavours to meets the needs of younger consumers.*

Tofu Bar is in almost every store in Japan with annual sales of over \$200 million.

# Some meat substitute markets niche but growing

Germany is the biggest market for meat substitutes in Europe, worth around €650 million (up 4% vs 2023). A 4% share of protein market.

Rügenwalder Mühle introduced its first vegetarian products on the German market in 2014 and today has a range of more than 50 vegetarian and vegan meat alternatives. They now account for around 60% of the company's sales.



# “Real” plant proteins made convenient



US meals and sauces brand A Dozen Cousins has grown rapidly by focusing on whole foods and authentic flavours.

Products are centred on beans and pulses, vegetables and avocado oil.



Australian brand **Fable Foods** uses shiitake mushrooms as the basis of its dishes. The flagship ingredient is easy to understand and the ingredient list is short.

Recently launched in US, already on 700 restaurant menus in Australia as well as Singapore and the UK.

# Actual Veggies: growth through taste, texture, “realness” and consumer trend connections

In the US **Actual Veggies** brand delivers a meat-free burger made with real vegetables.



**Emergent**

# New proteins becoming a reality



**2024 Singapore, Ajinomoto** launched ice creams made with Solein – the presence of the protein is for function (taste, texture) not nutrition.

**2025** widening the range.

Finland-based Solar Foods makes Solein and is supplying Ajinomoto and a US company

s+lein

WILL IT COOK?

**Pick a food.  
Any food.**

Solein can be an ingredient in all the dishes you know and love.

s+lein

WHAT IS SOLEIN?

**The mother of all proteins.**

Solein is an edible microbial protein alternative to soy, eggs, milk, meat, you name it. Might even make the food tastier.

# GLP-1a (weight-loss drugs). A driver of protein demand.



The key opportunity is in addressing consumer problems, side-effects often increase the need for certain nutrients.

1

## Protein

“For every 10 kg of weight lost, **4kg are from muscle** while 6 kg are from fat.”

Mostly brands are signposting existing products.



↑ Fage Greek yogurt sales grew by 40% and reached £105 million.

2

## vitamin D, B-vitamins, calcium, iron, potassium

Sales of Danone Oikos Greek-style yogurt sales surged **40% in 2024** Danone attributes to **GLP-1 users**.



## Our Approach to a GLP-1 Lifestyle

We're dedicated to supporting GLP-1 consumers on their nutrition journey with a range of nutrient-rich, delicious foods and beverages. As a leading food and beverage company with one of the healthiest, most exciting, and nutrient-dense portfolios in the industry, we have GLP-1 friendly choices that feature protein to help maintain muscle, fiber to support digestive health, and key vitamins and minerals for optimal nutrition.

3

## Digestive Wellness

GLP-1 users intestinal transit slows down to about **one fifth of the normal pace!**

Not necessarily “more fibre”.

Probiotics can play a role (kefir & Activia sales up in US may be connected).

**Digestive enzymes may have more potential than fibre:**



Lipase



Actinidin

EMERGENT BLOOD SUGAR FRIENDLY

# EMERGENT BLOOD SUGAR-FRIENDLY

An emergent trend. Growing consumer interest is not in relation to diabetes but to:



zzz Sleep

Anxiety

Depression

Focus

Hormonal health

Energy

Weight wellness

Blood glucose is a major focus of research and there is a growing body of evidence which shows connections between blood glucose, mood and mind

SCHOOL OF PUBLIC HEALTH  
UNIVERSITY OF MICHIGAN

Is Your Mood Disorder a Symptom of Unstable Blood Sugar?

This also connects to the GLP-1a frenzy.



CATEGORIES THAT CAN CONNECT TO THE BLOOD SUGAR TREND:

Dairy

Fats

Protein

Better grains

Snacks & bars



## Some take-aways

1

Consumer beliefs about food & health have become more diverse. There are many more “tribes” you can aim at than in the past – and many more opportunities.

2

Connecting a product to multiple consumer needs & health interests = greater chance of success

3

Consumer interest in protein shows no sign of slowing down.

# Thank you!

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