

# A surrogate for health

*The mainstream evolution of high protein products and foods*

June 2025



# The proliferation of protein

From *powder*, to *supplements*, to *convenience*, to *everyday food*

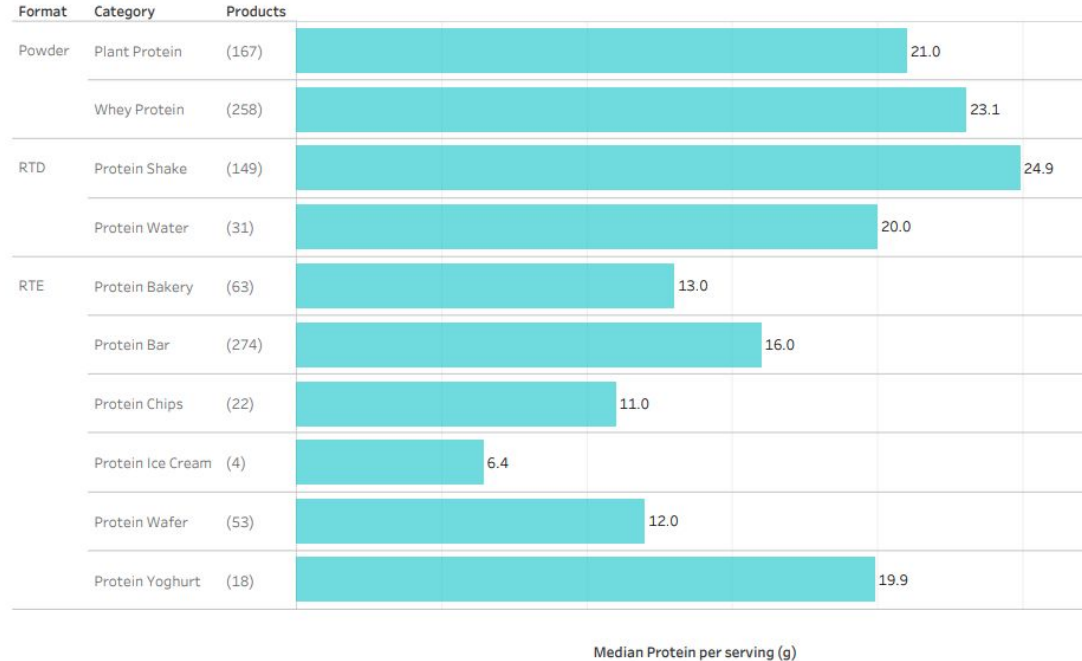
Sports

Wellness



Figure 1. The mainstreaming of high protein products; from performance to health

# How much protein is enough protein?



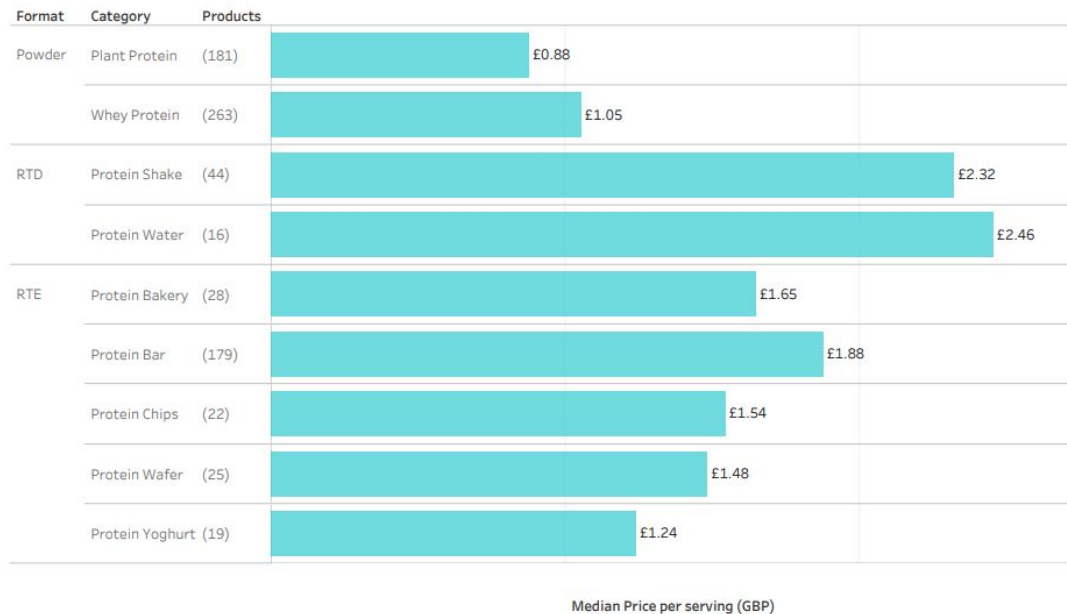
# Protein powder and drinks (RTDs) continue to offer the consumer the gold standard 20g of protein per serve.

# Protein bars provide slightly less protein at 16g, albeit this median value is based on a large dataset, with many iconic brands at ~20g.

# All other high protein snacks, based on our sample data, provide closer to 10g of protein with the exception of dairy.

Figure 2. The median amount of protein per serving for primary protein formats

# How much would you pay for protein?



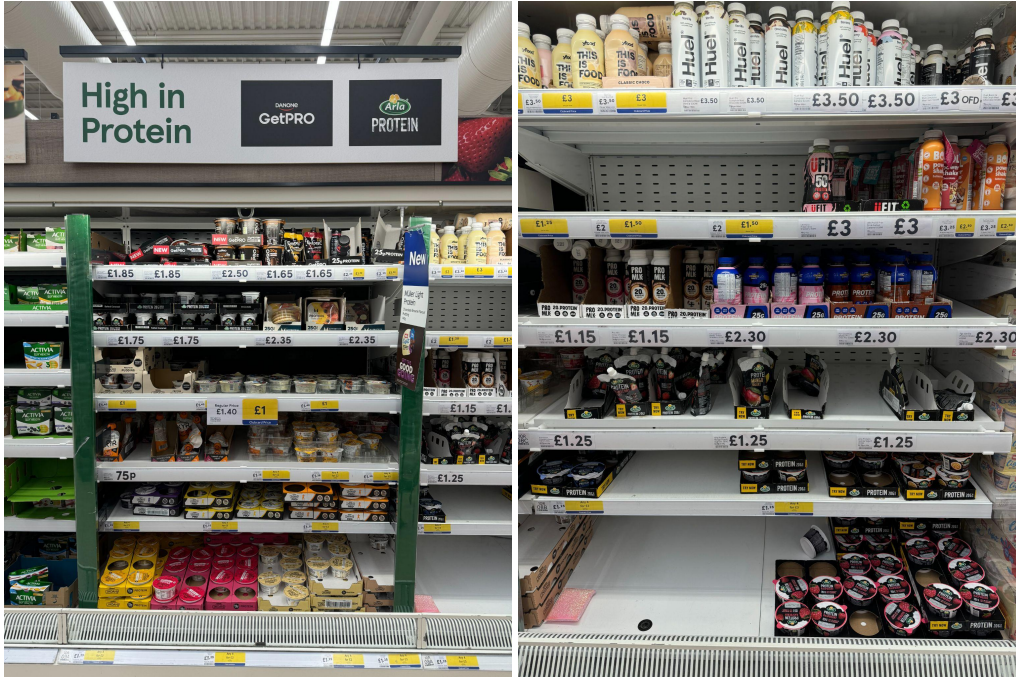
# Protein powder provides the most cost efficient way to add protein into your diet at ~ £1.00 per serve.

# Conversely, protein drinks takes advantage of the impulse decisions of consumers and is the most expensive form of protein.

# The interesting comparison to note is that dairy is the most cost effective protein format whilst also providing close to 20g of protein.

Figure 3. The median price per serving for primary protein formats

# *A naturally functional* dairy aisle



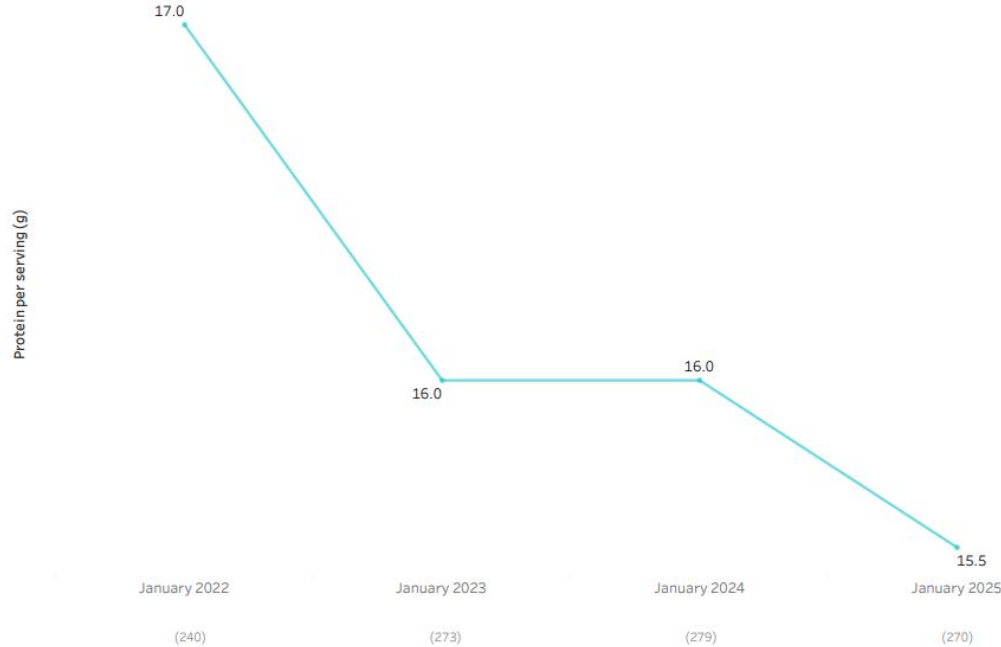
# In UK grocery stores, there is a clearly defined 'high protein' dairy point. This is owned by Arla and Danone.

# Other brands exist, and collectively they are offering yoghurt, skyr and puddings. Both in traditional pots and also pouches.

# The dairy aisle also retails adjacent to the high protein drinks - which is logical. Brands like Huel, YFood and For Goodness Shakes.

Figure 4. The impact of high protein dairy in grocery (UK)

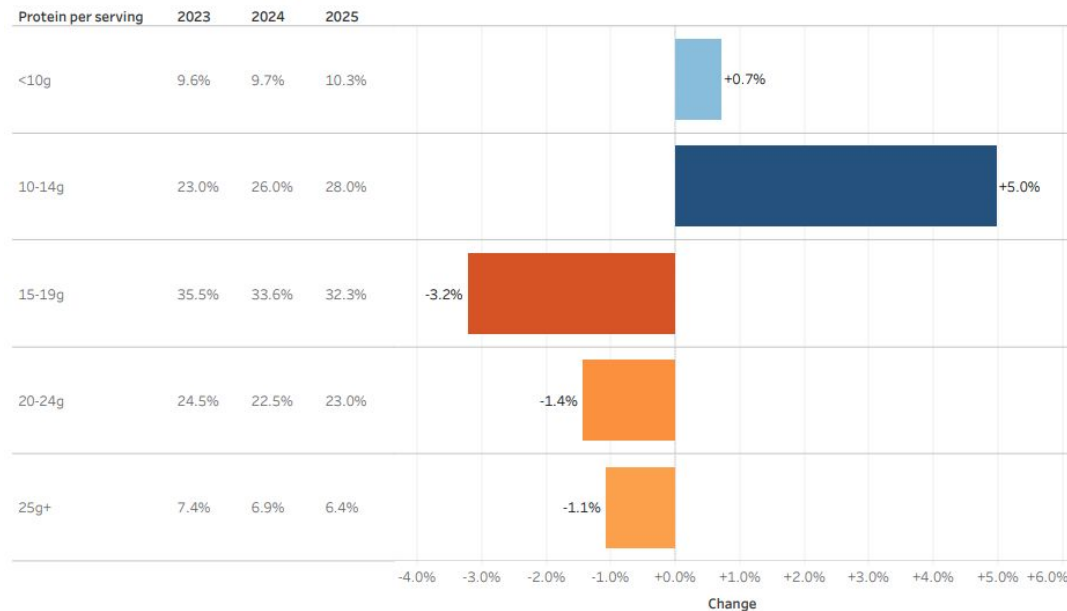
# A drive to be more accessible?



# Over the last three years, protein bars have been getting smaller and offering less protein per bar.

Figure 5. The median amount of protein per serving for protein bars over time

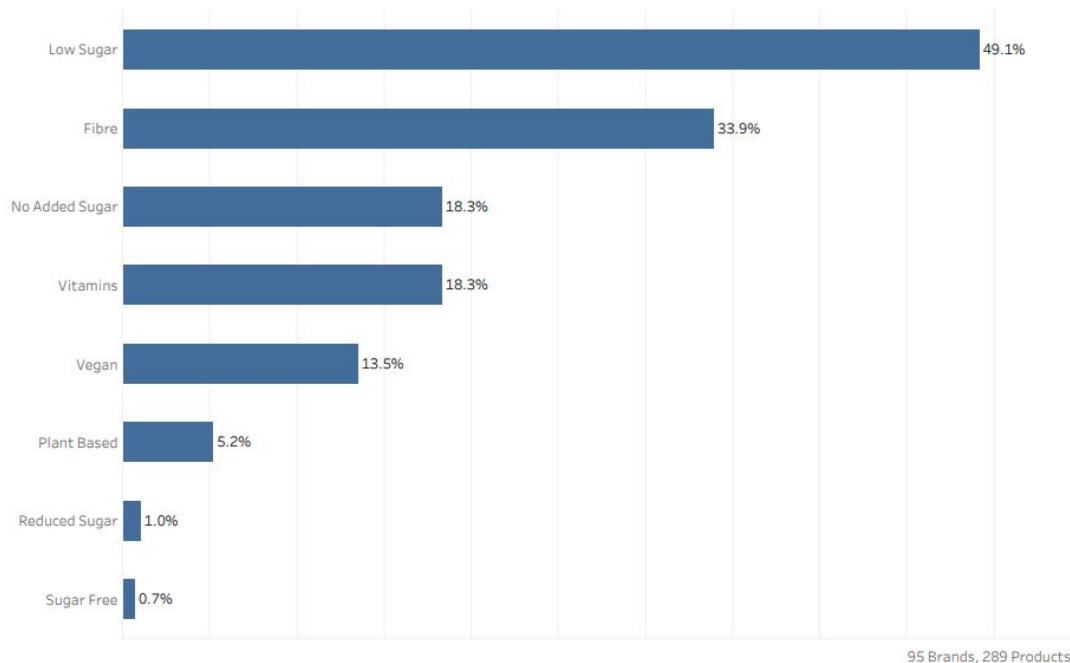
# A drive to be more accessible?



# Over the last three years, protein bars have been getting smaller and offering less protein per bar.

Figure 6. The change in protein bars available based on the amount of protein per bar

# Good nutrition rather than function



# Protein snacks focus on macronutrient based cues rather than function, particularly sugar.

# There is an number of products adding additional actives for the purpose of 'function'.

Figure 7. The top 8 claims made communicated by protein bars.



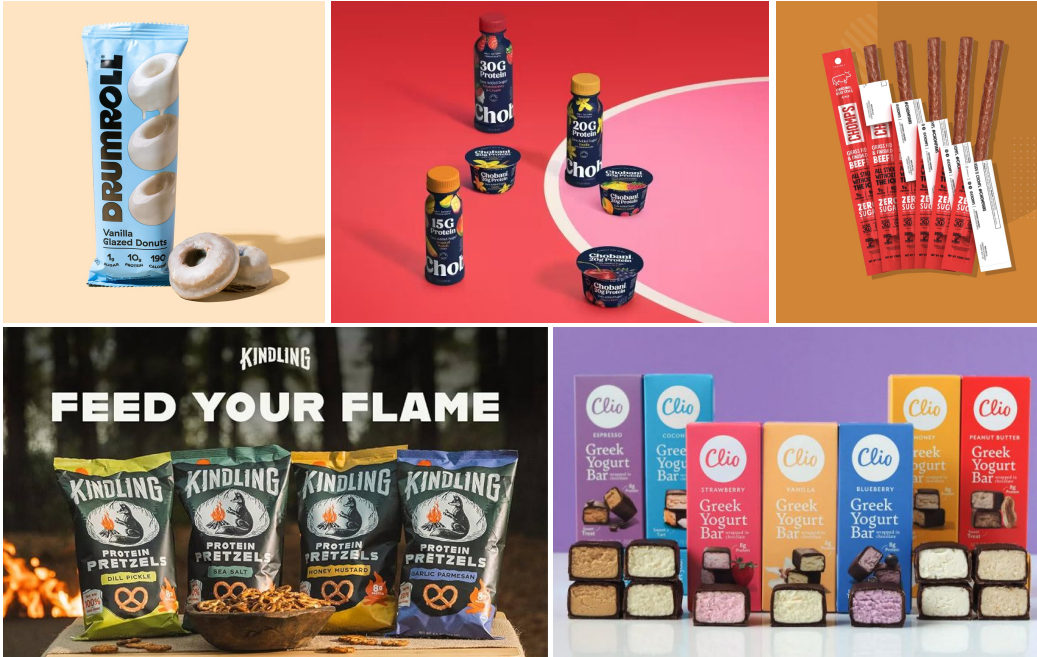
# Dairy, plant or both?



# In general, dairy protein dominates the category based on the number of products available.

# However, it is important to note that protein bakery and protein bars flavour more protein blends in their formulations.

# Protein in the US



# Consumers are leaning into food based formats (vs supplements), driven by younger households (Expo West communication)

Figure 9. High protein snacks available in the US at Expo West

# General Mills and *protein* Cheerios

DIVE BRIEF

## General Mills boosts protein levels in new Cheerios

The CPG giant is turning to the nutrient to help keep the legacy brand relevant as many consumers ditch cereal for other breakfast alternatives.

Published Dec. 16, 2024



“Cinnamon Cheerios Protein treats you and your family to an O-so-delicious taste with 8g of protein per serving.

This sweetened oat and pea protein cereal delivers satisfying cinnamon flavor in every bowl.

Each serving of this gluten free cereal contains 12g whole grain (at least 48g recommended daily), with no artificial colors or flavors

However you enjoy Cheerios Protein, General Mills cereals spread goodness from *tots to grown-ups*”.

# The role of protein and GLP-1

## GLP-1 SIDE EFFECT LOSS OF MUSCLE

40% of weight loss from semaglutide is muscle

- Less muscle can lead to weight regain and saggy skin (e.g. "GLP-1 face")
- Help decrease muscle breakdown with **HMB**\*
- Fuel muscle and boost workouts with **creatine**\*

\*These statements have not been evaluated by the Food and Drug Administration. These products are not intended to diagnose, treat, cure, or prevent any disease.

## GLP-1 SIDE EFFECT LOSS OF MUSCLE

Reduced protein intake can lead to muscle breakdown.

- Resistance-based exercise can help maintain muscle, but working out also increases the body's demand for protein.
- When appetite and food intake are decreased, try an easy **protein supplement**.

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muscle guard  
protein

helps prevent muscle breakdown

3g myHMB + 20g whey protein

maintains strong and healthy bones

prebiotic fiber supports gut health

youtheory  
DR. FORMULATED  
MUSCLE GUARD  
protein  
GLP-1 SUPPORT  
protects muscle & bone when reducing calories

net wt. 17.1 oz (485 grams)  
dietary supplement

vanilla flavor

Figure 11. A GNC approach to GLP-1 (L) and You Theory Muscle guard (R)

# A subtle shift in protein messaging



# Premier Protein - A protein bar aligning to GLP-1 and weight loss but in a subtle way through messaging.

# Biocare - A protein bar included as part of the solutions from a 'GLP-1' focused brands. Its USP - 15g of protein plus vitamins and minerals.



# A subtle shift in protein messaging

### What makes Blueprint Supplements better than other leading supplement brands?

You get clinically relevant doses

Triple tested

We publish our CoAs, so you can check the exact quantities of active ingredients in each supplement



It's common for companies to not have the levels of ingredients they say on the label

### What is in Blueprint Longevity Protein?

Protein powder with 26G plant based protein per servings, with elite polyphenol density.

- Omega 3 & 6**  
Supports skin, hair and nails
- Polyphenols**  
Supports heart health
- Plant protein**  
Supports muscles
- High in Fiber**  
Supports digestive health



**Does not contain additives or fillers.**

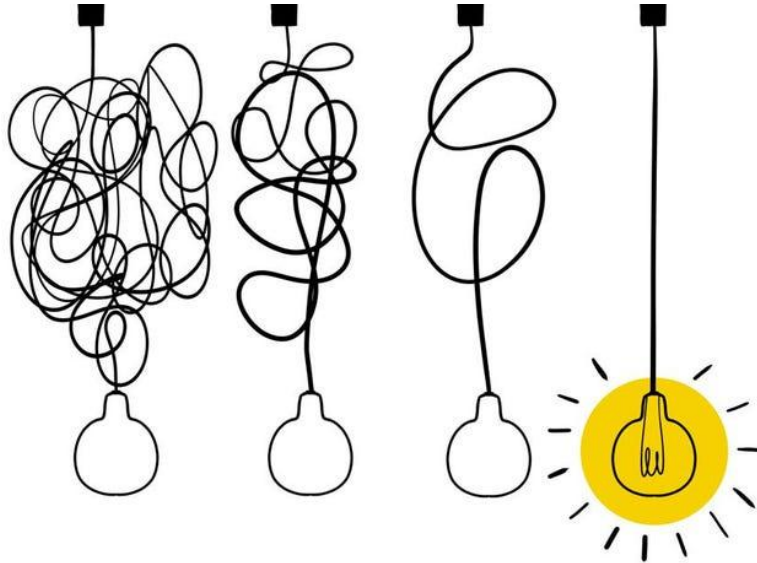
THESE STATEMENTS HAVE NOT BEEN EVALUATED BY THE FOOD AND DRUG ADMINISTRATION. THIS PRODUCT IS NOT INTENDED TO DIAGNOSE, TREAT, CURE, OR PREVENT ANY DISEASE.

# From health ageing to longevity - a subtle but significant shift in targeting proactive consumers focused on today *for* tomorrow.

Figure 13. Longevity protein from Blueprint

# To summarise

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# There is a significant & continued evolution of high protein products - in all formats - available to consumers.

# Increasingly, high protein products are focused on health and nutrition and are dissociated from sports nutrition.

# Products inevitably need to balance quality (dose, source) and accessibility, whilst also standing out from the crowd.

# Longevity and GLP-1 and the renaissance of weight management represent new opportunities for protein to evolve further.

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