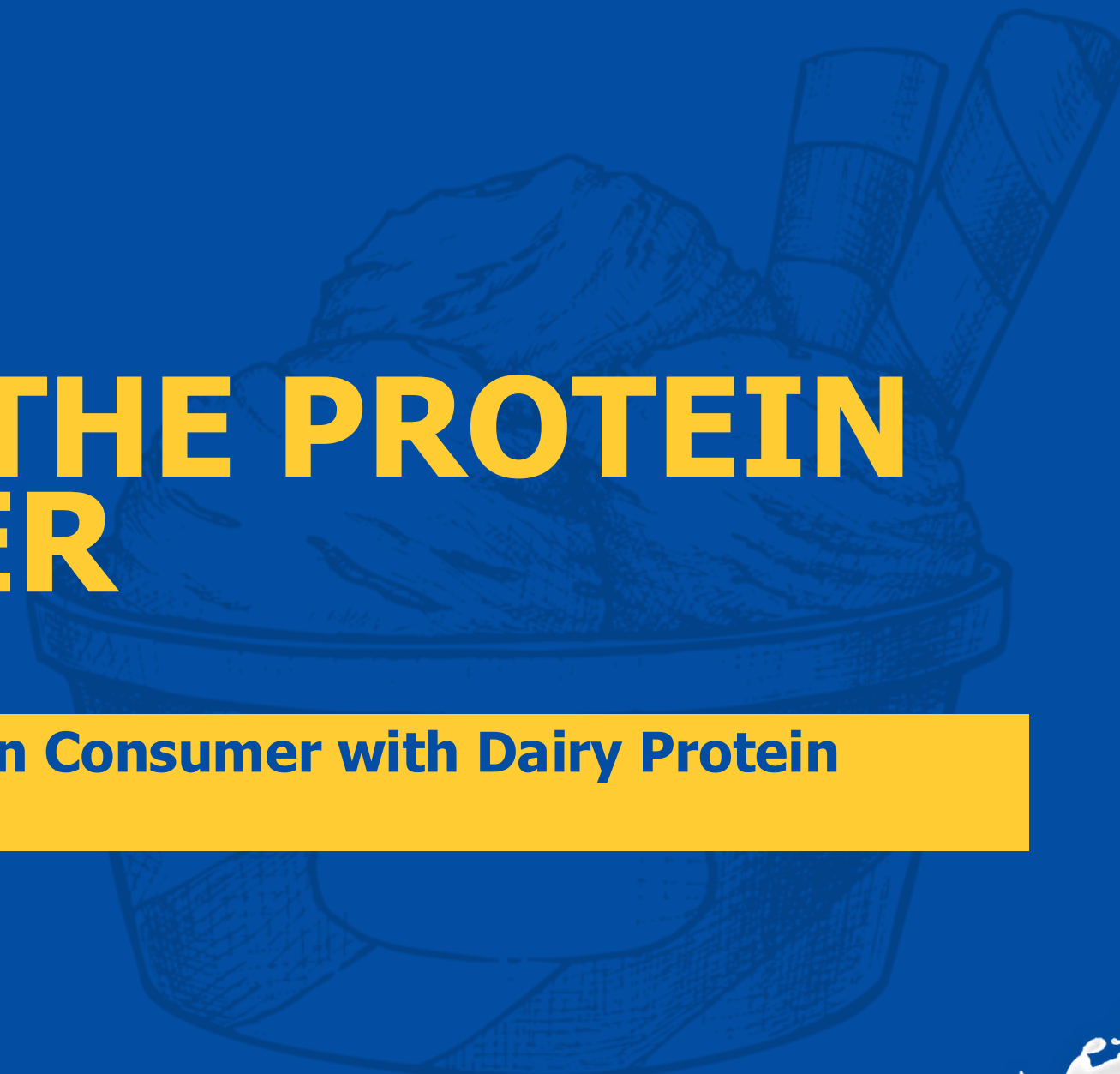


DAIRY & THE PROTEIN CONSUMER



Winning Over The Protein Consumer with Dairy Protein Claims

Webinar June 25, 2026



SESSION OBJECTIVES

- By the end of this session, you will understand...
 - Which protein claims are dairy processors leveraging in product innovation?
 - Which protein claims are other food & beverage categories leveraging in product innovation?
 - How can dairy leverage protein claims to boost sales?



AGENDA

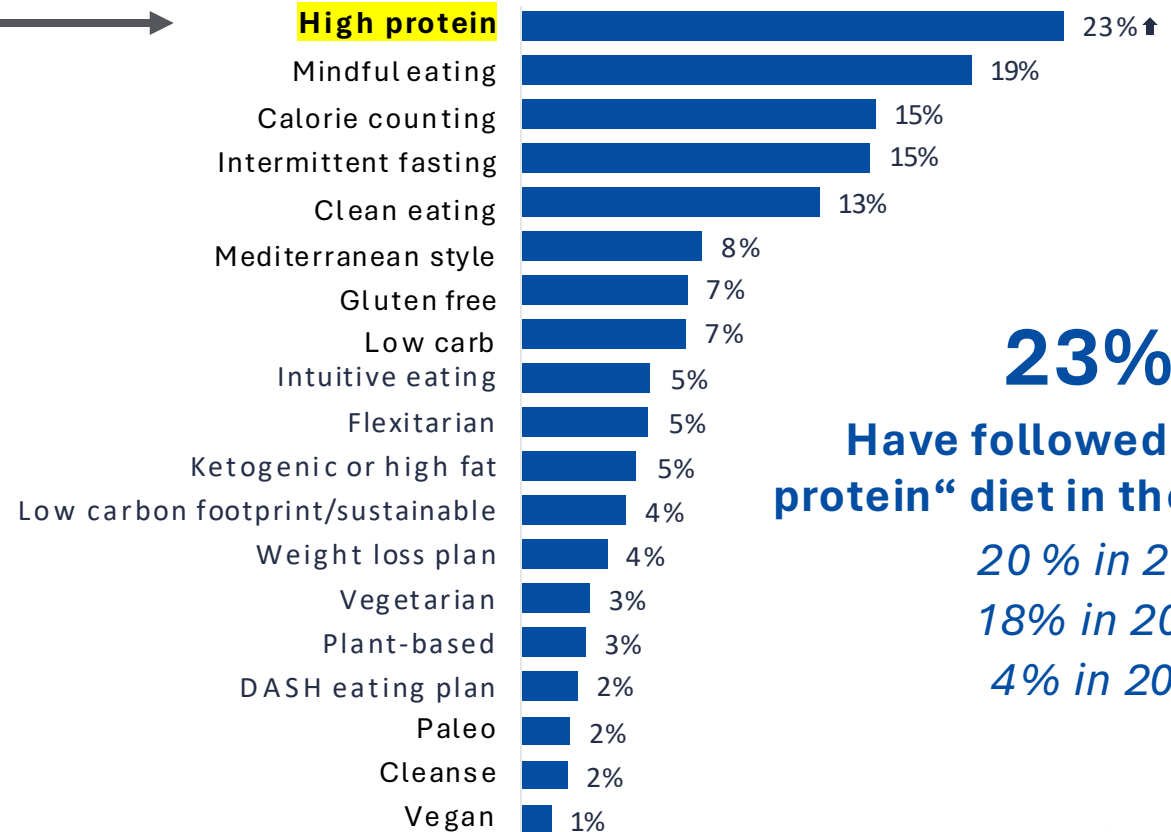
- Protein Consumer Mindset
- Protein Claims Trending in Dairy
- Protein Claims Trending in Adjacent Categories
- Recommendations: Leveraging Dairy's Protein



MORE AMERICANS REPORT FOLLOWING “HIGH PROTEIN” DIETS, CONTINUING A THREE YEAR UPWARD TREND

For the third straight year, “high protein” is the most common diet Americans are following

Followed Eating Pattern/Diet in Past Year



23%

Have followed a “high protein” diet in the past year

20 % in 2024

*18% in 2023**

*4% in 2018**

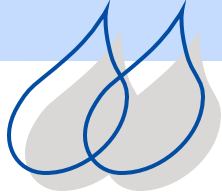
IFIC Food & Health Survey 2025 [TREND 2018-2025] N3 Have you followed any specific eating pattern or diet at any time in the past year? Select all that apply. (n=3000)

*High protein was not assessed from 2019-2022. Note: Arrows in the charts indicate significance vs. the previous year. Arrow in the callout box indicates significance of 2025 vs. years noted.

Note: “Other” is not shown.



Nearly three dozen CPG companies have mentioned GLP-1 drugs on their earnings conference calls this year

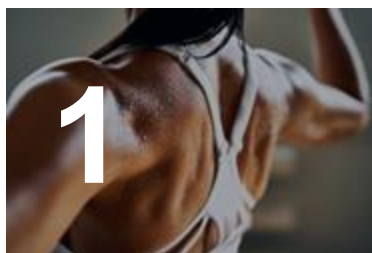


"We expect GLP-1 and other anti-obesity drugs to have a **lasting influence in the food and nutrition landscape**, nudging some consumers towards smaller portions and more nutrient-dense protein and fiber-forward foods."

General Mills' CEO Jeffrey Harmening at CAGNY 2026

**THEY
PRIORITIZE
PROTEIN
FOR
STRENGTH,
RESILIENCE,
AND
SATIETY**

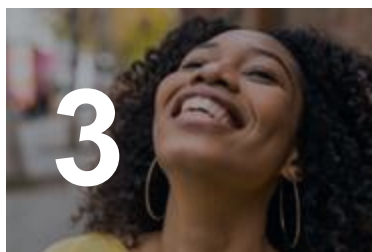
| Top 3 Motivations for Protein Consumption |



Builds or maintains
muscle



Keeps my body
strong as I age



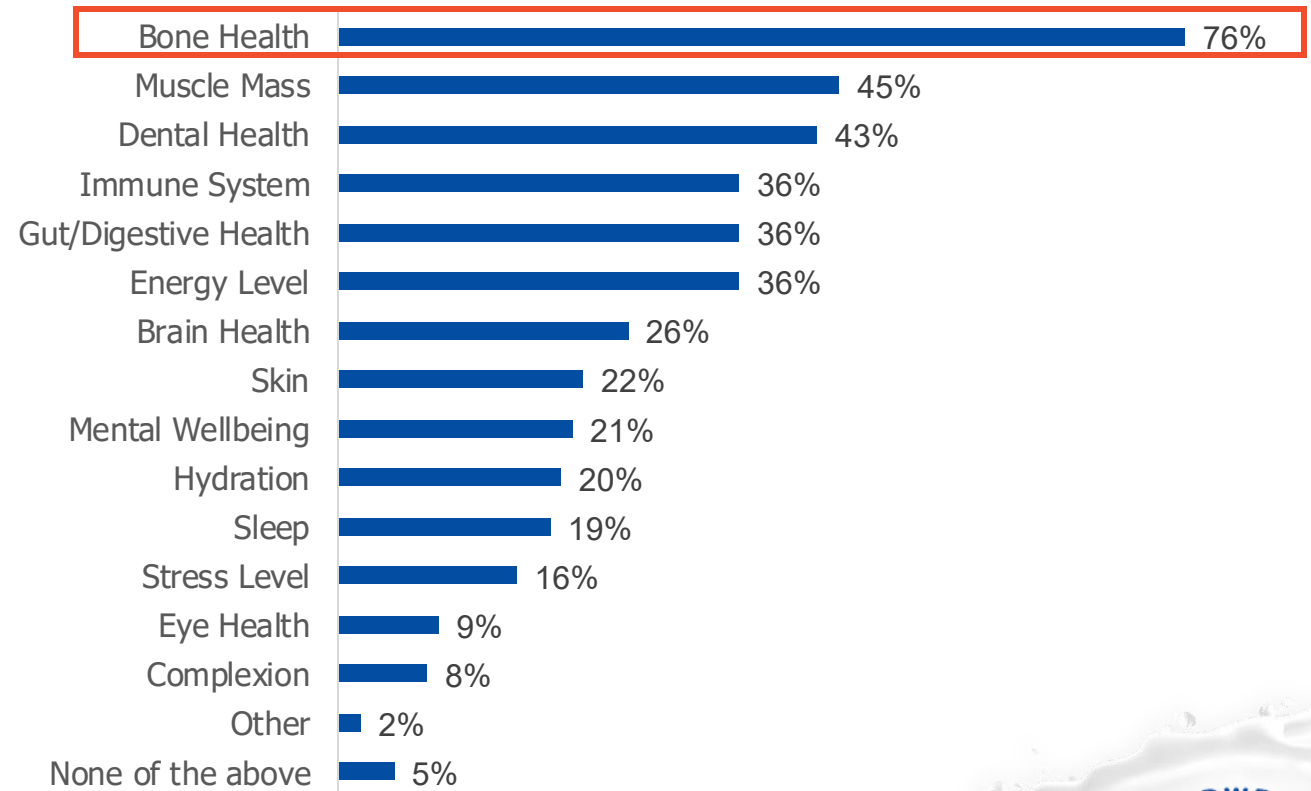
Helps me feel **satisfied**
throughout the day

HEALTH BENEFITS OF DAIRY: BONE HEALTH

Consumers rely on dairy to deliver a wide-variety of health benefits, especially bone health.



Consumer Perceptions Top Health Benefits of Consuming Dairy



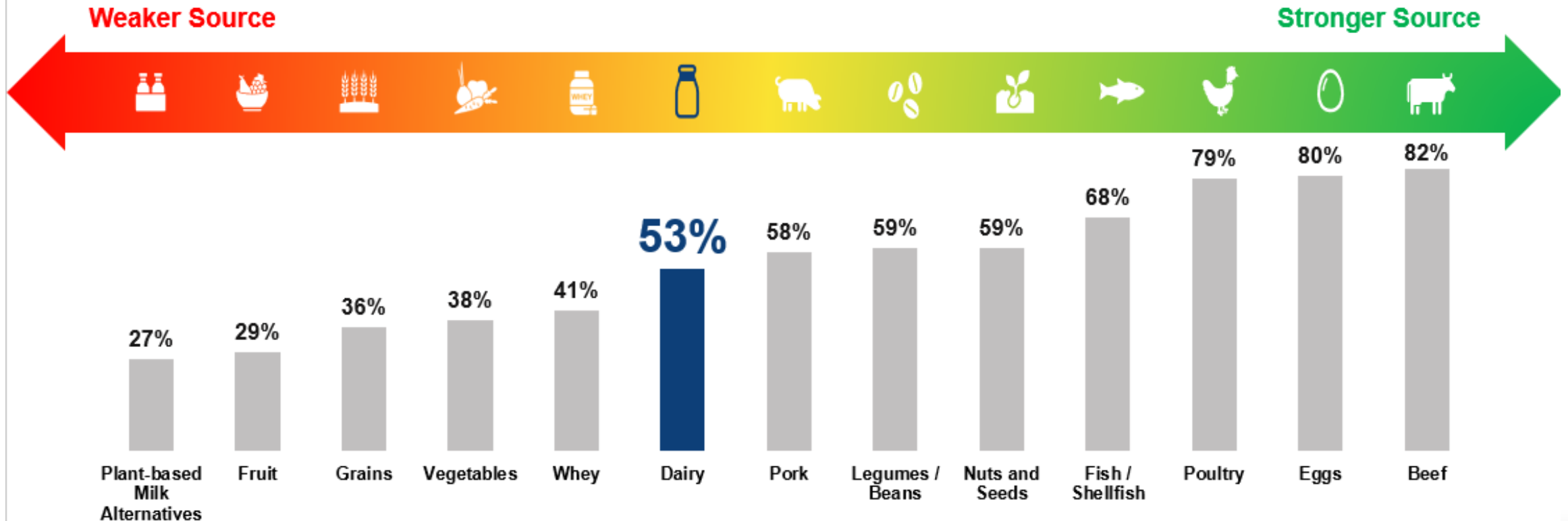
Source: Total Respondents in Midwest Dairy Region (n=1000)

Q25 Please select the top FIVE benefits that you feel dairy products provide for your personal wellness. Dairy products improve my...



PROTEIN AWARE CONSUMERS CONSIDER DAIRY A MID-TIER SOURCE OF PROTEIN

| ONLY 53% CONSIDER DAIRY TO BE A GOOD SOURCE OF PROTEIN |





INNOVA
MARKET
INSIGHTS

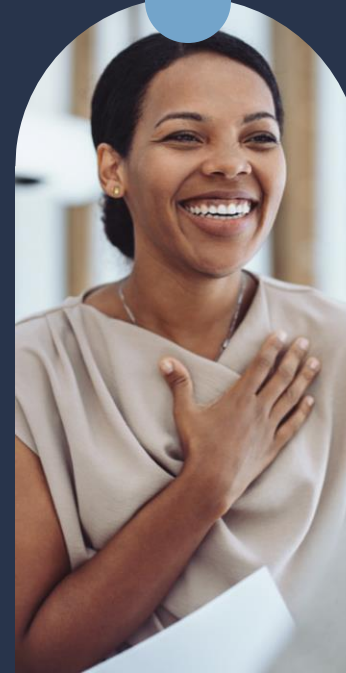
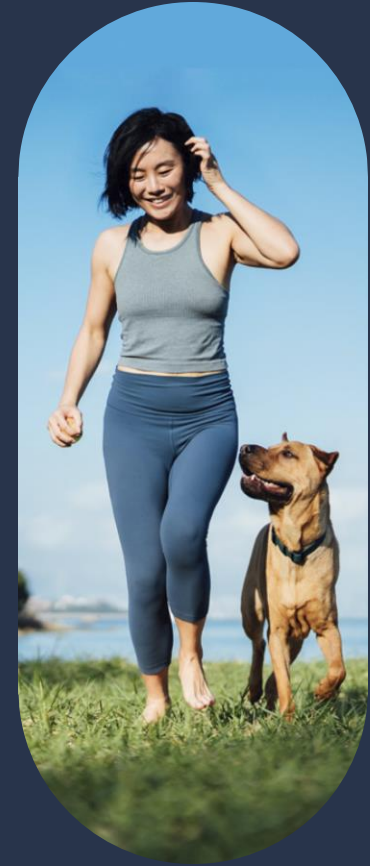
Innova Market Insights

Dairy & Protein: Trends and perspectives

INSPIRE INNOVATION DRIVE GROWTH

Presented by Tom Vierhile, tom@innovami.com

INSIGHTS
360





Instagram

Se connecter S'inscrire

BBC

INTELLIGENCE | THE CUT | VULTURE | THE STRATEGIST | New York | CURBED | DRUG STREET

the
Strategist

May 6, 2025

We've Tried Dozens of Protein and These Are the Best Included and plant-based protein powder different flavors.

By Michael Zhao, a senior writer at the Strategist covering applied style. 📌

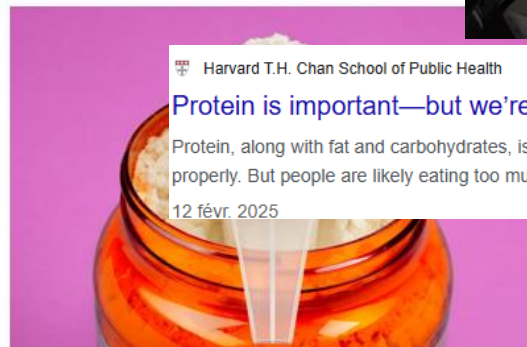


Harvard T.H. Chan School of Public Health

Protein is important—but we're eating too much, experts say

Protein, along with fat and carbohydrates, is key to keeping the body functioning properly. But people are likely eating too much of it, according to experts.

12 févr. 2025



The Protein Scramble Bowl in test at Chick-fil-A. | All photos courtesy of the brands.

There's no end in sight for the protein-mania that's sweeping the country. Chick-fil-A has always had a protein focus with its chicken-centric menu, but now the fast-food chain is doubling down. Other brands are into protein too, with chicken, beef, shrimp and protein-enhanced beverages hitting menus this week. Speaking of beverages, make way for more refreshers.

Video Live

ed to

re Save



Serenity Str



**HIGH PROTEIN
CHICKEN
WRAP**

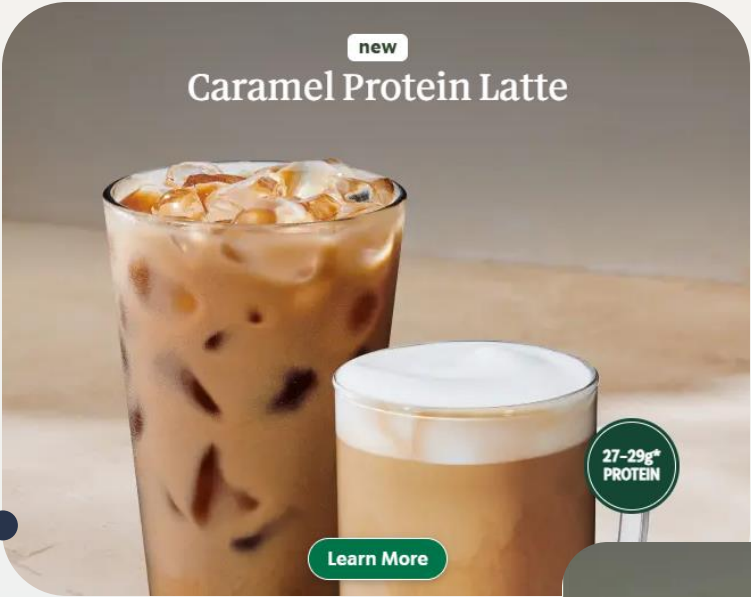
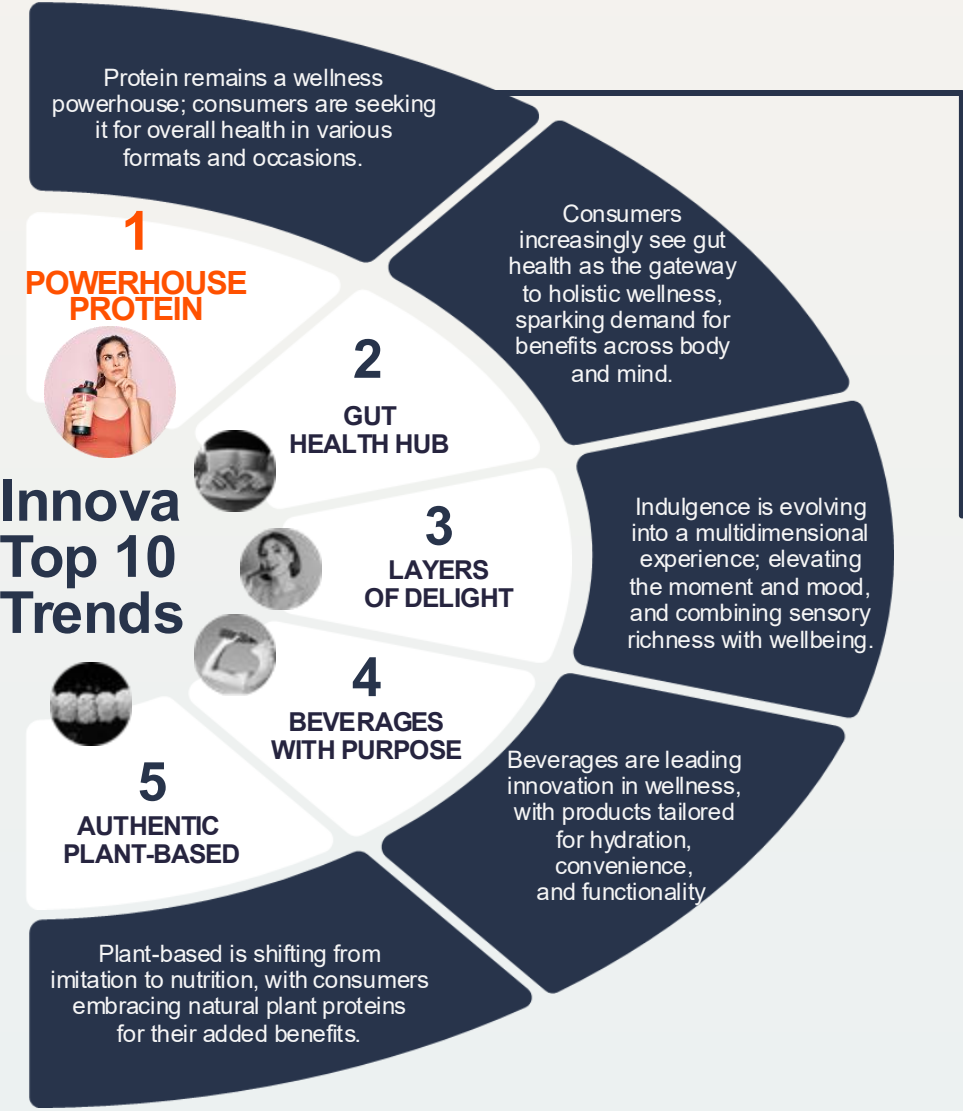
52G Protein Chicken Wrap
🍔 (354 cals)

9,7 M de vues

INSPIRE INNOVATION DRIVE GROWTH



Protein has evolved from a niche sports nutrition benefit ingredient into a mainstream wellness cue



Starbucks high protein latte

*The flavors you crave and the nutrition you need
Lattes, leveled up
Our **high-protein lattes** are crafted with **Protein-boosted Milk**, delivering up to 36g of protein and flavors worth savoring, like vanilla, caramel, and more.*



Source: Innova Database, [Buffet Proof](#)

Protein's appeal is as high as ever, for consumers of all ages

59%

of US consumers are
**actively including
protein** in their diet

Boomers 66%
Gen Z 59%



54%

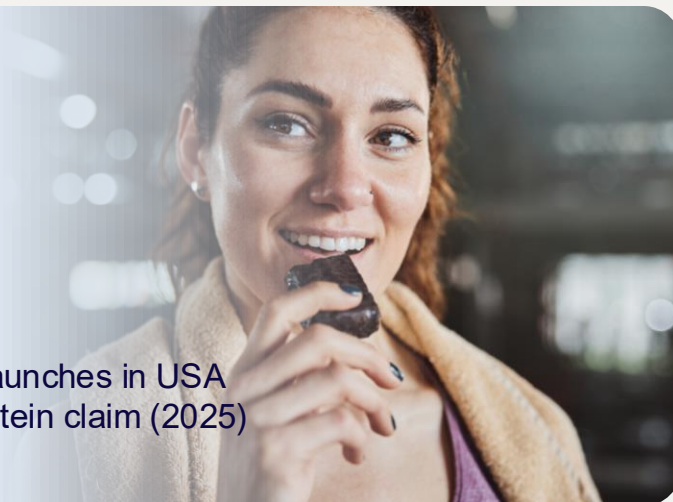
of US consumers are
paying attention to
protein in their diet

Boomers 62%
Gen Z 52%

From mega trend to a new normal

14%

of new **Food and Beverage** launches in USA include a high or source of protein claim (2025)

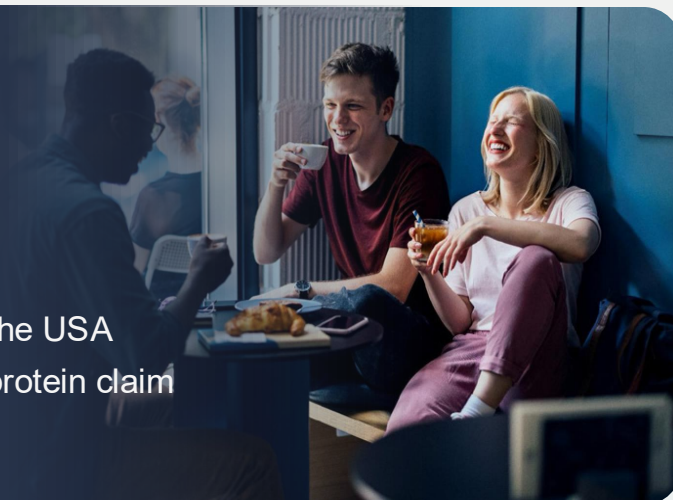


Protein puffs
15g protein.
GMO free. 0 sugar. Gluten free.
Guilt free.

 USA, Dec 2025

+4%

growth of new F&B launches in the USA that include a high or source of protein claim (YoY 2024 VS 2025)



Each individual snack cup contains **10g fiber, 20g protein, and 9 essential amino acids.**

 USA, Nov 2025

Protein is permeating every major category



SPORTS NUTRITION



USA, Mar 2026

+9% CAGR, 2021-2025

“Every linear bar is made of 20g of premium whey protein isolate.”



READY MEALS & SIDE DISHES



USA, Mar 2026

+3% CAGR, 2021-2025

“Protein 27g per serving 42% DV.”



SNACKS



USA, Mar 2026

+7% CAGR, 2021-2025

“Delicious three cheese blend. Contains 6g protein per serving.”



DAIRY



USA, Mar 2026

+4% CAGR, 2021-2025

“It is rich in protein and calcium a wonderfully delicious way to snack.”



Protein in Dairy

Protein dairy is gaining ground on both fronts; strong consumer pull and rising innovation momentum



% penetration of dairy innovation* with
high or source of protein claims
(USA, 2025 VS 2021)



The most purchased product making protein claims is

US Consumers

Yogurt & Yogurt Drinks

38% of American consumers purchased in the
past 12 months



**Siggis Simple Ingredient Skyr
Tropical Yuzu**

*Made with real fruit.
Simple ingredients. Artisanal yogurt.
Crafted with less.
High quality protein - contains 15g
protein.
Low fat.*

USA, Jan 2026

Source: Innova Database
Note: *excluding dairy alternatives and vegan products

Yogurt has become the home of protein in the dairy space

54%

Spoonable and drinking yogurt innovation featuring a high or source of protein claim

USA, 2025

+1%

Growth of spoonable and drinking yogurt with a high or source of protein claim

CAGR, USA, 2021-2025



Siggis Yogurt Pouch
Made with real fruit.
Contains 8g protein per pouch.
45% less sugar and 2x the protein
compared to leading kids' yogurt. With other natural flavor. Reduced fat.



**45% less sugar
& 2X the protein**
compared to leading kids' yogurt.
Contains 16% more of the Daily Value of Protein

USA, Apr 2026

Protein-forward milk is growing by double digits over time

46%

New flavored and unflavored milk innovation featuring a high or source of protein claim

USA, 2025

+16%

Flavored and unflavored milk with protein shows strong long-term momentum

CAGR, USA, 2021-2025



Meadow Gold Milk **With Extra Protein**
*87% more protein (14% more of the DV for protein than regular milk). Protein content of regular milk is 8g per serving, protein content of milk with extra **protein** is 15g per serving. Fresh and local dairy.*

USA, Apr 2026

Cheese emerges as the new growth engine for protein innovation

23%

of new cheese innovation
features a high or source of
protein claim

USA, 2025

+17%

Cheese with protein shows
healthy long-term momentum

CAGR, USA, 2021-2025



Simple Truth **Protein**
Reduced Fat Monterey
Jack Cheese
*Good source of protein.
Good source of calcium.
7g protein per serving.
Non-GMO.
5% less fat than regular.
Great for on the go
snacking.*

USA, Mar 2026

7g
PROTEIN
PER SERVING

GOOD
SOURCE OF
PROTEIN

GOOD
SOURCE OF
CALCIUM

Creamers may be protein's last white space opportunity in dairy

Only **1%**

of creams & creamers
feature a high or source of protein
claim

USA, 2025



Nurri Protein Creamer

**5g protein and 1g sugar
per 4 tbsp.**

**Made with real milk and
cream.**

USA, Apr 2026

Not just for new category innovation: internationally, protein offers opportunities to rejuvenate recipes in traditional categories

Cottage cheese



Driven by social media and the appeal of protein, cottage cheese has been showing strong dynamism.

Skyr



Mostly in Europe, Icelandic Skyr is positioning itself as a strong functional dairy option.

Cancoillote



Driven by TikTok trends, cancoillote, a traditional French recipe, is experiencing sudden renewed popularity for its low fat / high protein profile.



More than numbers

How can a product stand out once protein has become the baseline?

The protein-content race is maxing out



Lifeway Kefir Cultured Low Fat Milk
With Holiday Cookies

🌐 USA, Jan 2026



Sprouts Farmers Market Low Fat Plain
Greek Yogurt

🌐 USA, Mar 2026



Oikos Pro Peach Cultured Dairy Drink

🌐 USA, Feb 2026

More protein content per serving

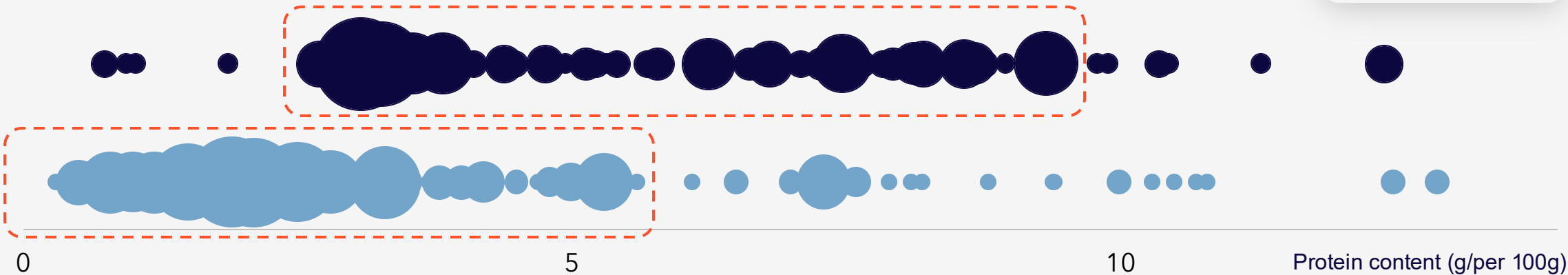
In the Dairy protein vs Plant-based protein race: Dairy leads in protein amount



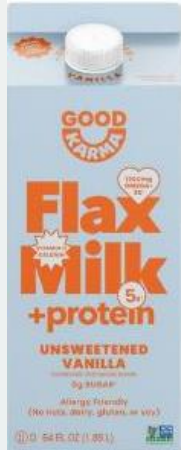
DAIRY VS ALTERNATIVES (MILK & YOGURT): PROTEIN CONTENT

Protein content (g/per 100g) of dairy and alternative dairy products tracked with a protein claim (Bubble size = # of launches USA, 2021-2025)

- Dairy
- Dairy alternatives



Lala Plus Mango Yogurt Drink
Excellent source of **calcium**.
Contains **11g protein**. Contains 4g fiber.
Contains active probiotics.
Good source of protein.
USA, Apr 2026
(5.3g protein/100g)



Good Karma Flax Milk Plus Protein
Source of **vitamin D and calcium**.
Contains **5g plant protein from karmically powerful peas**.
Our flax milk blends plant-powered nutrition with thoughtful intention for a creamy, feel-good sip.
USA, Mar 2026
(2.1g protein/100g)

Effectiveness and digestibility emerge as key differentiators

What factors are the most important to you when choosing food and drinks to get protein?

25%

of US consumers are concerned about how well the body absorbs or uses protein (Effectiveness of protein type)



MULU's Proprietary Protein

This unique two-layer formulation boosts the protein content and provides both fast and sustained fuel.

 USA, Apr 2026

Protein is increasingly supporting a multi-benefit health platform

“I controlled my protein intake to improve the following **physical health areas** in the past year”



78%
#1 WEIGHT

15g Protein.
Creamy & Delicious.
At :ratio™, we do the math, so you don't have to. Our unique trio of 15g protein, 0g added sugar*, and 3g carbs adds up to a creamy and delicious snack to help fuel your day.



77%
#2 HEALTHY AGING



10 G
GRASS FED
COLLAGEN

100%
NATURAL

98%
ABSORPTION RATE

CURB CRAVINGS | IMPROVE
METABOLISM | HEALTHIER HAIR, SKIN,
NAILS, & JOINTS

76%
#3 HEART HEALTH

Supports heart health
& overall wellness

- all-natural
- rich in antioxidants
- no added sugars



What's next?
**What can we learn from
innovation in adjacent categories?**



Inspiration #1 - Fit in consumers' regular routines: Clear protein innovation unlocks occasions in refreshing drinks



USA, Dec 2025

Passion guava flavored protein water.
A blend of functional benefits including electrolytes for hydration, and **10g clear whey protein** and BCAA's to hit your daily protein goals.



USA, Sep 2025

Orange flavored sparkling clear protein:
say goodbye to chalky protein shakes and hello to **smooth, ultra-filtered whey protein isolate**.



USA, Aug 2025

Watermelon wave flavored clear protein powder. Zero sugar. 22g protein per serving.

Inspiration #2 - Keep it natural: Winning formulations from nuts are backed by clean-label and natural sourcing credentials



44%

of **nut spreads** launches include a high or source of protein claim (USA, 2025)



Top **health claims** in snack nuts & seeds and nut spreads with high or source of protein claims
Global, 2025

% penetration of **health claims** in snack nuts & seeds and nut spreads with high or source of protein claims
USA, 2025

#3	No additives /preservatives	21%
#4	Natural	13%
#5	Organic	9%

6G OF PROTEIN*



PREMIUM MONTEREY VARIETY

USA, Apr 2026

*Protein boost. Packed with good stuff.
Premium Monterey variety. 6g of protein.*

Inspiration #3 – Grassfed ingredients: Highlighting grass-fed turns protein into a quality-and-provenance story



+21%

Growth of new sports nutrition launches that include a high or source of protein & a grassfed claim (USA, CAGR, 2021-2025)



USA, Mar 2026

GRASS-FED
WHEY PROTEIN ISOLATE

Hosstile Iso H1 **Grass Fed** Whey Protein Isolate Protein Powder
100% pure whey isolate: delivers **26g of premium grass-fed protein** per serving.

+ 21 grams of grass-fed protein and 12 grams of essential amino acids per serving

Legion Whey Plus Protein Isolate Dietary Supplement
Grass-fed milk from Ireland that's **gentle on the stomach, easy to digest**, and doesn't cause **bloating or discomfort**.



USA, Mar 2026

Inspiration #4 – Weight management’s reinvention: GLP-1 is creating a structural tailwind for daily protein



50% of current GLP-1 users

consumed **more protein ingredients** in their diet after starting to use GLP-1 based weight loss methods



 USA, Nov 2025

Shaklee Lemon Lime Sparkling Protein

*This sparkling protein is crafted with **40g of clean, ultra-filtered, grass-fed BLG whey protein** with boosted leucine and a superior amino acid profile, making protein goals **easy to meet and enjoy**.
neutralizing cravings for longer by **naturally raising your GLP-1 levels**.*



 USA, Mar 2026

Biocare High Protein Cheddar Cheese Double Bites

***High quality protein** to preserve lean body muscle mass.
Perfect companion to your biocare beverage and your **GLP-1 meal plan**.
Low in calories & made with what your body needs.
Grab & go nutrition.*

Key takeaways: Protein in Action

Building on strength, unlocking new value, shaping the next era of dairy innovation



Protein: The new normal

Protein claims are now table stakes in the dairy space; differentiation must come from protein +.



In dairy, the protein growth engine is uneven

Growth is uneven across categories, creating clear leaders and new white-space opportunities.



Future growth is about more than numbers

Future value will be driven by quality, efficacy, targeted benefits, and format innovation.



EXPLORING OPPORTUNITIES THROUGH OUR 360 INSIGHTS



NEW PRODUCT DATABASE

Track thousands of products. Benefit from the detailed analysis using solid data.



EXPERT REPORTS

Specialist analysis and future perspectives, from macro-level to detailed analysis.



CONSUMER INSIGHTS

We capture 35 million data points annually, thanks to our series of global surveys.



CUSTOM PROJECTS

Our team of consultants can help you identify opportunities for your business.



QUESTIONS?





THANK YOU
REACH OUT MORE

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www.innovamarketinsights.com



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THANK YOU



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