

Market trends and growth drivers

We operate in large and growing markets

Global consumer megatrends are driving unprecedented demand for protein and functional nutrition. Glanbia’s products are uniquely positioned at the centre of these high-growth protein and functional nutrition categories.

Our key addressable markets



Performance nutrition focuses on maximising athletic performance across product formats and occasions including protein powder, ready-to-drink (“RTD”) and ready-to-eat (“RTE”).



Lifestyle nutrition focuses on improving physical and cognitive health through functional products across all formats including vitamins, minerals and supplements.



Functional beverages allow consumers to improve and maintain energy levels through convenient RTDs delivering functional benefits including energy and hydration.

Our opportunities

Market-leading portfolio of brands and ingredients

- **PN:** Optimum Nutrition is the world’s #1 sports nutrition brand.
- **H&N:** Serves customers across performance nutrition market with great-tasting nutrition solutions.
- **DN:** Leading protein expertise to support both performance and everyday athletes.

Megatrends



Functional products and ingredients to make life healthier

- **PN:** Dedicated portfolio of lifestyle brands including Isopure and think! to support consumers’ nutrition.
- **H&N:** Custom premix solutions that deliver vitamins and minerals to lifestyle consumers across formats (e.g. gummies, powders).
- **DN:** Leading whey protein solutions and bioactives that help people live more healthy energetic lives.

Megatrends



High-quality ingredients to deliver functional benefits

- **PN:** Position in energy RTD with Optimum Nutrition Amino Energy. In 2025, launched Isopure Protein Water.
- **H&N:** Create great-tasting, clean-label beverages with vitamins and minerals for customers.

Megatrends



¹ Source: Euromonitor.

Our markets are accelerated by powerful megatrends

Consumer needs



1 Protein demand rapidly expanding

Fitness is no longer an occasional activity: it is now a lifestyle choice. A growing focus on active lifestyles, new innovations in weight management and a greater understanding of the link between diet, exercise and health has led to the mainstreaming of protein with demand accelerating globally across all consumer groups as people prioritise protein intake on a daily basis.

US consumers prioritising protein on a daily basis

80%

Source: Nielsen IQ protein trends



2 Demand for functional benefits from nutrition growing

A desire for improved health and physical wellness is driving the demand for functional ingredients. Consumers are searching for better, healthier and smarter nutritional and functional ingredients that support everything from energy and focus, to muscle repair and gut-health.

US consumers who now consider wellness a top or important priority in their everyday lives

84%

Source: McKinsey Future of Wellness Survey



3 Cleaner products gaining consumer preference

Today's consumers are increasingly seeking greater transparency on the ingredients within their food with demand for clean-label and minimally processed foods on the rise.

Global F&B launches featuring a clean label in 2025

30%

Source: Innova Market Insights

Consumer behaviours



4 Extension of health benefits across occasions

Consumers are increasingly seeking functional nutrition outside of traditional occasions, driving the growth of new high-protein formats (e.g. protein coffee, protein cereal, etc).

Increase of high-protein products outside of traditional categories

26%

Source: Nielsen IQ protein trends



5 Pleasure with purpose emphasising taste and texture

Consumers want to indulge in taste and texture while staying aligned with health and wellness goals. This is often challenging as producers seek to include difficult to work with functional ingredients and molecules into great tasting food.

UK and US consumers who say that taste is a key priority when deciding what to eat

92%

Source: Attest



6 Experience culture fusing digital and real world

Consumers are looking for better integration of physical wellbeing with digital tools. Experience culture is rising with digital and real world fusing together and consumers seeking health and wellness experiences outside of traditional channels.

US consumers willing to share personal health data for better personalised care

69%

Source: Verily