

Belgium

Suzanne Mulier

Plant-Based Director  
Danone Benelux

Living Consumer Intelligence | [business.yougov.com](https://business.yougov.com)



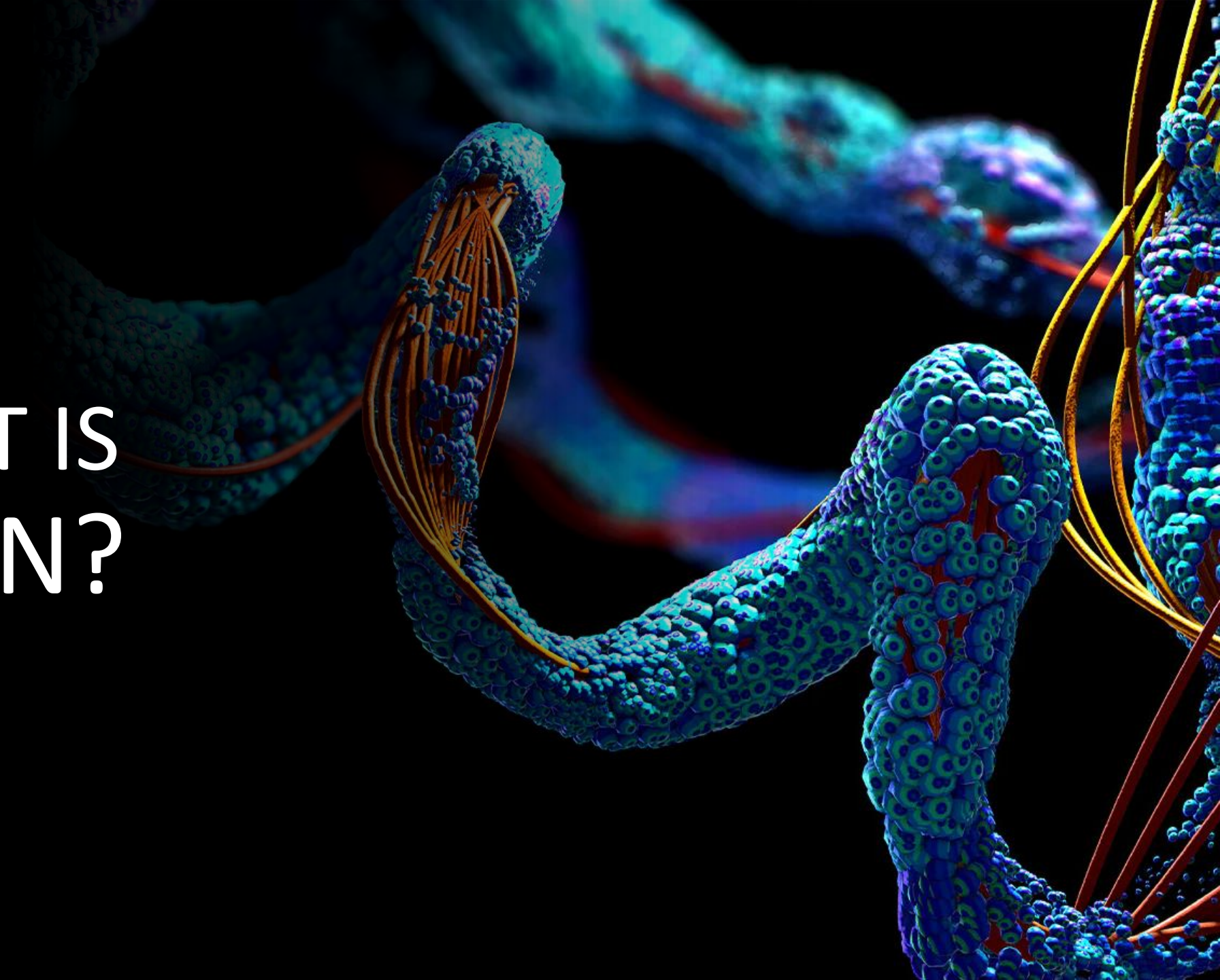


# THE RACE TO PROTEIN

Suzanne Mulier  
MKT DIR Alpro Benelux



SO WHAT IS  
PROTEIN?





Proteins are **complex biological molecules** that are synthesized in all cells and living organisms



They are **important functional and structural components** in all cells, tissues, and organs of the body, such as the **skin, hair, muscles, or hormones**



Proteins are also an important component of our diet. They provide, among other things, **nitrogen and amino acids**.





Proteins consist of  
**20**  
different **amino acids**



**9**

So-called essential  
amino acids must be  
provided by the diet.



Isoleucine, leucine, lysine,  
methionine, phenylalanine,  
threonine, tryptophan,  
valine, histidine

**11**

amino acids can be  
produced by our own  
body



The body of a 70 kg adult contains approximately 10-12 kg of proteins:

42% in the skeletal muscles

15% in the skin & the blood

10% in the visceral organs



Contribute to the maintenance and growth of muscle mass\*

The quality of a protein depends on the amount of EAA & the digestibility of the protein source

**PROTEINS**



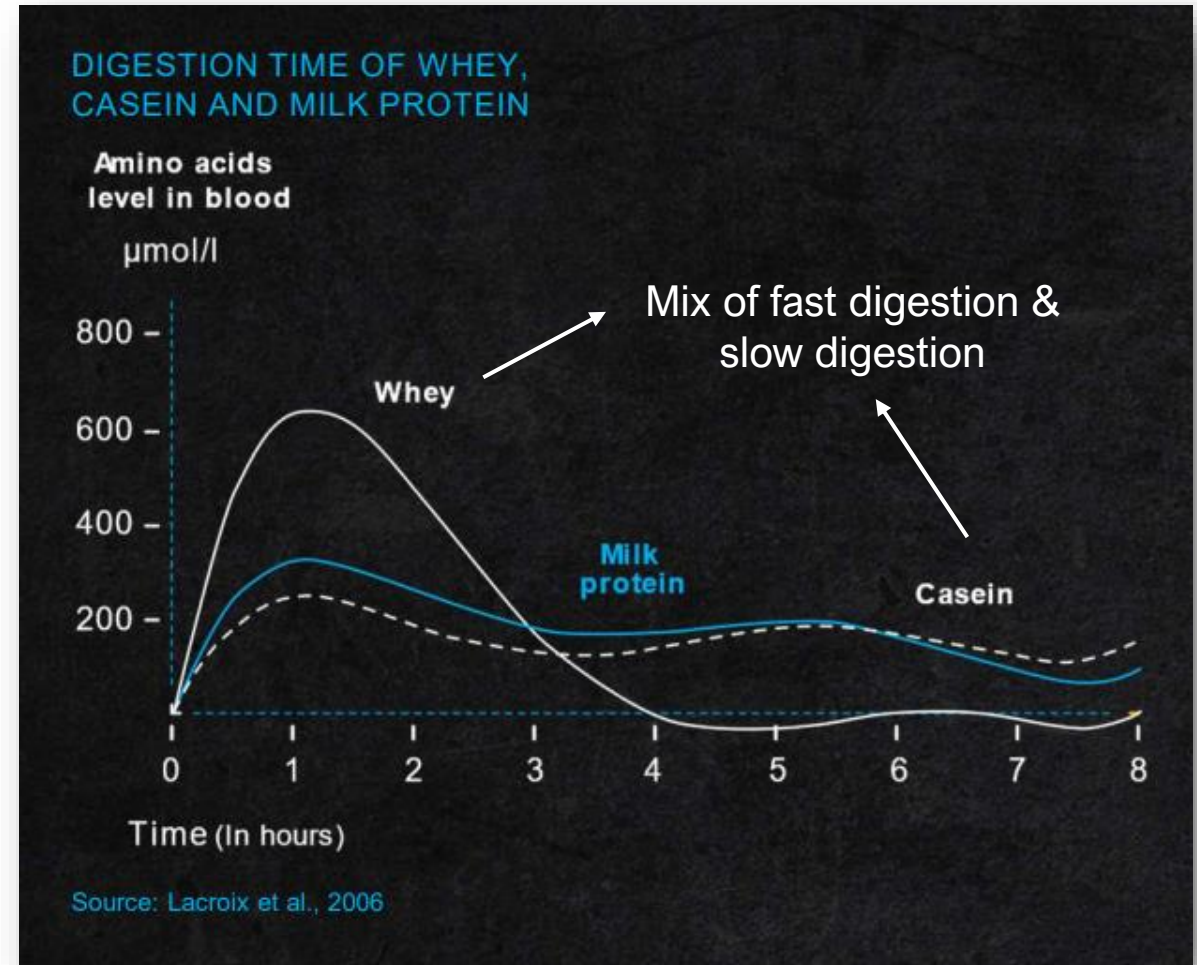
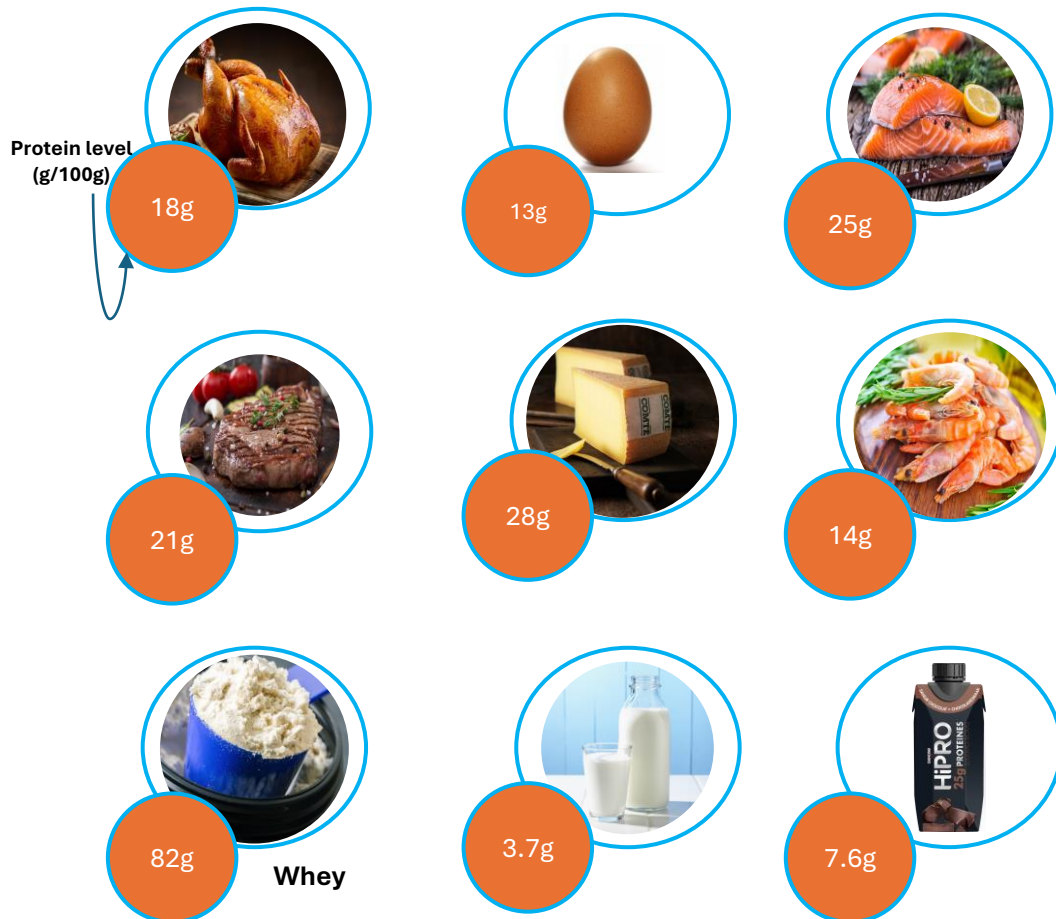
Can be a source of energy  
(4 kcal/g protein)



Contribute to the maintenance of normal bones\*

# DIFFERENCE IN QUALITY & SOURCE OF PROTEINS IS RECOMMENDED

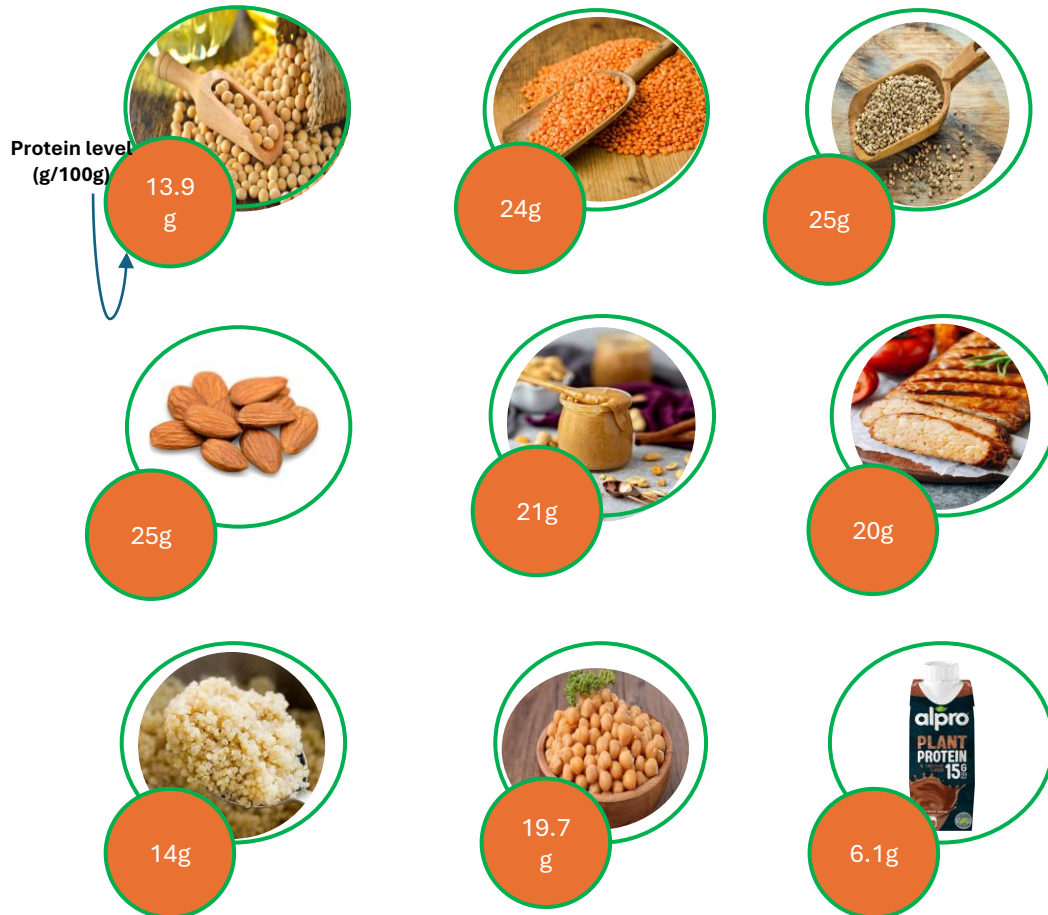
## DAIRY PROTEIN





# DIFFERENCE IN QUALITY & SOURCE OF PROTEINS IS RECOMMENDED

## PLANT-BASED PROTEIN



Source: Nubel

### Soya proteins



A soya bean contains 38 to 40% proteins



COMPLETE  
protein



DIGESTIBLE  
protein

**Soya** is the only plant-based protein source that contains **all 9 essential amino acids** and has **good digestibility**. Therefore, it is an excellent source of high-quality plant-based proteins!



# NEW GUIDELINES ON BALANCE BETWEEN ANIMAL & PLANT PROTEIN



**31% of Belgians  
eat Flexitarian diet**

As part of a healthy diet, respecting nature's resources; it is essential to improve the proportion between animal-based & plant-based protein



**25% of Belgians would like  
to eat more plant-based  
protein in the future**

New guidelines:  
Choosing to eat plant-based food during half of your week is a big step forward for your health & the planet



VLAAMS INSTITUUT  
**GEZOND  
LEVEN**



**Vlaamse  
overheid**

BUT WHAT DOES IT  
MEAN FOR OUR  
CONSUMER?





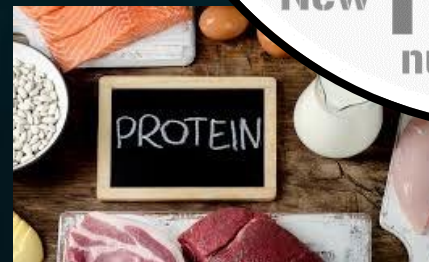
# WHITE PROTEIN

SKYR



# PERFORMANCE PROTEIN

BLACK PROTEIN





# PROTEIN IS THE FASTEST GROWING SEGMENT IN DAIRY & PLANT-BASED

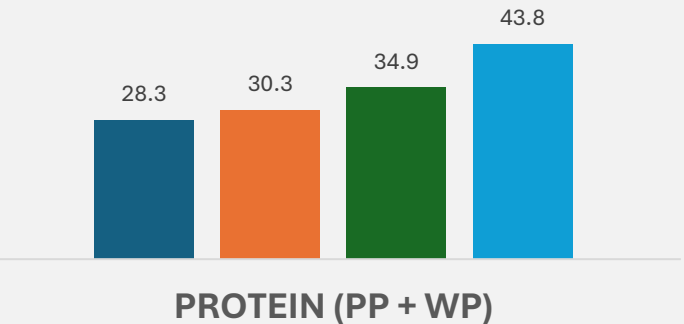
## DOUBLE DIGIT GROWTH YTD

**+42%** WHITE PROTEIN

**+28%** PERFORMANCE PROTEIN



## DRIVING FAST RECRUITMENT



■ MAT Jun 2021 ■ MAT Jun 2022 ■ MAT Jun 2023 ■ MAT Jun 2024

## WITH THE POTENTIAL TO FURTHER CONVERT

PENETRATION	
Plain	76.9
YAF	74.9
Greek	56.8
WHITE PROTEIN	28
PERFORMAN CE PROTEIN	22



1 OUT OF 5 NON-BUYERS  
CONSIDER TO BUY  
HIGH PROTEIN IN FUTURE

# BUT WE WANTED TO GET A DEEPER UNDERSTANDING WHY PEOPLE BUY

Purchasing  
data reveal:

- **patterns**
- **switching**
- **trends**
- **predictions**



What is  
bought

360° - we complete the shopper picture



What is  
thought

Integrated  
survey insights go  
beyond and tell  
you **what shoppers**  
**think and feel**



**YouGov**

N=1.300 buyers & acceptors  
of (plantbased and/or dairy) **high protein**  
in the past 12 months

# WHO ARE YOUR PLANT-BASED PROTEIN BUYERS AND USERS?

## In terms of sociodemo?

Plant-based high protein buyers / users:

**Rather young** i.e. <39y

Living in the **North** of the country

**Higher social class** than the average population

Consumed rather by **female users**

## In terms of lifestyle, habits and diet?

Plant-based high protein buyers and users are slightly **more heavy sporters** compared to the other buyer groups. They especially have **broader sports interests and habits**, practicing more different disciplines and **a.o. more strength training and free bodytraining**.

In terms of diet, plant-based protein buyers eat in a **slightly less traditional** way than dairy black and especially than non protein buyers – suggesting that **flexitarian** eating habits go hand in hand with an **openness** to enriching one's diet with extra protein.

When looking at their general needs regarding food choices, plant-based protein buyers are concerned about their **weight** and **supplementing their diet**. They are sensitive to **ingredients** and **avoiding baddies** on top of that.

## In terms of protein awareness?

Despite the general consensus that proteins are essential in a healthy diet, the vast majority of shoppers has **no clue** at all **about** the **exact grams** of protein needed in a day. **Most** shoppers are looking for proteins in **natural sources** such as meat, eggs and dairy but do **not** pay attention to the **exact daily amount** of proteins they take in.

This is **not really different** for **plant-based** protein buyers, although at the same time (part of) this buyer group is clearly **more convinced** of the **necessity** of taking in extra protein.



# WHERE, WHEN AND WHY IS PLANT-BASED PROTEIN USED?

## Where & when?

Alpro Protein is eaten especially **at home** and at a rather **occasional** base. OOH usage is especially high for dairy black protein, although also for this subsegment at home usage remains dominant.

**Snacking** is the key consumption moment for plantbased protein, even exceeding dairy protein and skyr here. **Breakfast** as an occasion shows **opportunities for being unlocked** by plantbased protein, now being almost fully claimed by skyr.

## And why?

Main reason to consume Alpro protein is the intake of extra **protein** in an **indulgent** way, and with a special **focus to weight and health**.

- Shared with **dairy black** protein are the drivers of getting extra **protein**, developing **muscle mass** and **recovering** after sporting. Both are also seen as **convenient** to take along.
- Shared with **skyr** are drivers of **health and ingredients** (no added sugars) – although these are still a bit stronger for skyr. Both are also linked with **daily routine**, confirming the credibility of plantbased protein in the breakfast segment.
- **On top**, plantbased protein claims its strength of **weight** management and **indulgence** more than the other subsegments.

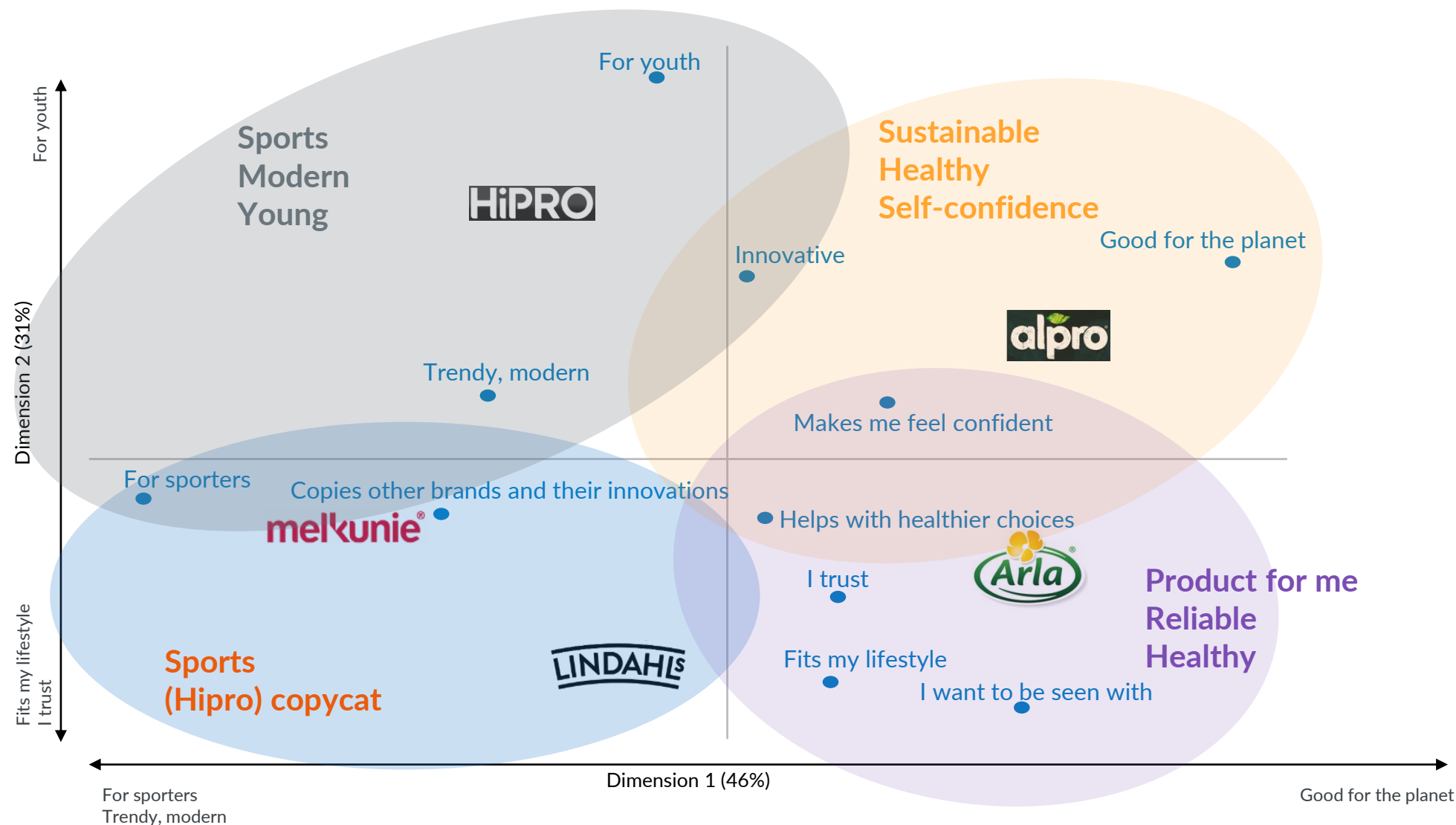
High protein is an **incremental purchase** in 2/3 of the cases.

## Where do shoppers meet Alpro Protein?

The **shelf** remains the key touchpoint for all protein segments. Apart from that also **promotion** plays a role for plantbased (and dairy black) protein. **Sampling** comes third and is slightly more important for plantbased vs. the other protein segments.

Importantly, almost **4 out of 10** buyers **decided** to buy the category only **in-store**, confirming the importance of the **shelf** and **POS communication** as a touchpoint.

# BUT A LOT OF NEW PLAYERS RACING TO GROW PROTEIN

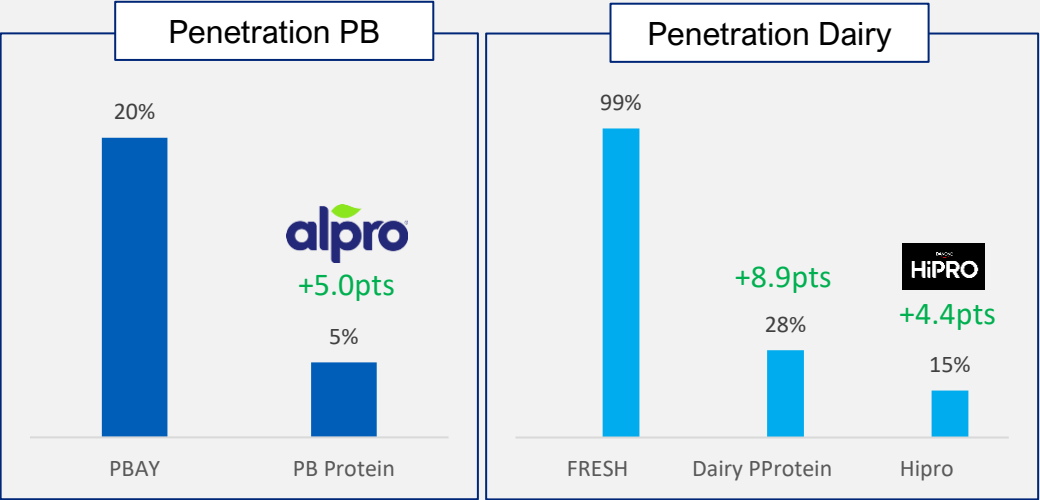


# THERE IS A CLEAR NEED FOR BOTH PLANT-BASED AND DAIRY PROTEIN WITHIN PERFORMANCE PROTEIN



## 1. Both Dairy & Plant-Based attract specific & exclusive shoppers

With Plant-Based protein already at an impressive **penetration** after 1 year of launch



## 2. White, performance and Plant-Based protein are targeting different profiles and addressing different needs and occasions

CONSUMER NEEDS		
	PB Protein	Dairy PP
Protein Need	23%	21%
Support healthy eating	24%	21%
Weight Management	25%	16%
Muscle Mass Building	14%	11%
Recovery	10%	12%
Satiation	17%	21%
Enjoyment	28%	20%
Daily Routine	16%	8%

Highlighted in bold = significant difference between groups



# DANONE HAS ALL THE MEANS TO GROW THE PROTEIN SEGMENT

3 STRONG BRANDS COVERING ALL NEEDS AND STRONGLY INVESTING IN MEDIA

## HIPRO



47% AWARENESS (X2 since 2021)

+65% MARKET SHARE

BRAND POWER X2 vs competition

## ALPRO



94% AWARENESS

+70% MARKET SHARE

PB PROTEIN ABILITY TO ATTRACT EXCLUSIVE  
BUYERS TO THE PB CATEGORY

## DANONE SKYR



84% AWARENESS

N°1 BRAND POWER IN TOTAL FRESH

# SPORT OPPORTUNITY

CROSS-FIT/FITNESS



CYCLING



POWER/GYM



ENDURANCE







TEAM PLAY



IMPACT SPORT



# SEGMENT OPPORTUNITY

	 <b>INDIFFERENT INACTIVES</b>	 <b>WELLBEING WARRIORS</b>	 <b>EXERCISE ENTHUSIASTS</b>	 <b>PEAK PERFORMERS</b>
<u>SEGMENT &amp; SIZES</u>	<b>10%</b>	<b>54%</b>	<b>26%</b>	<b>10%</b>
<u>FITNESS RELATIONSHIP</u>	<b>INDIFFERENT</b>	<b>IRREGULAR, USUALLY LOW INTENSITY</b>	<b>REGULAR &amp; ENGAGED WITH SPORTS</b>	<b>VERY FREQUENT, ESSENTIAL PART OF THEIR ROUTINE</b>
<u>FOOD &amp; NUTRITION RELATIONSHIP</u>	<b>TASTE &amp; PLEASURE AN ABSOLUTE PRIORITY</b>	<b>HEALTHY EATING FOR LONGER, BETTER LIVING. LOW TRADE-OFFS WITH TASTE</b>	<b>F&amp;B CHOICES TO SUPPORT THEIR HEALTH &amp; ROUTINE. HIGHLY VALUE NATURALITY</b>	<b>FUNCTIONAL RELATIONSHIP VERY CHOICEFUL &amp; USERS OF "HARDCORE" PERFORMANCE FOOD</b>
<u>YOPRO AWARENESS</u>	<b>29%</b>	<b>40%</b>	<b>43%</b>	<b>46%</b>
<u>YOPRO PENETRATION*</u>	<b>7%</b>	<b>11%</b>	<b>13%</b>	<b>17%</b>
<u>GROWTH OPP</u>	<b>LOW</b>	<b>MEDIUM</b>	<b>HIGH</b>	<b>MEDIUM / HIGH</b>

**ALPRO TARGET**

**HIPRO TARGET**



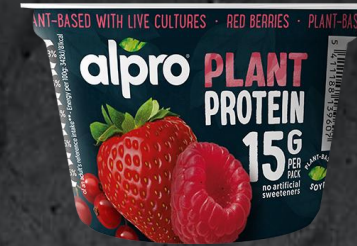
A black and white photograph of a person in athletic wear running on a path. The person is in the foreground, slightly out of focus, with their legs and feet visible. They are wearing running shoes. The background is a blurred path and some foliage. Overlaid on the center of the image is a black rectangular box containing the white alpro logo. The logo consists of the word "alpro" in a bold, lowercase sans-serif font, with a stylized leaf icon above the letter 'p'. A registered trademark symbol (®) is located to the upper right of the word.

alpro®

# BROAD CHOICE IN AMBIENT & FRESH WITH CONTINUED INNOVATION



9 EAA  
15g/250ml



*Point of differentiation:  
No sweeteners!*



# BIG OVERINVESTMENT WITH TARGETED APPROACH



Average Rob





# IMPORTANCE OF HEALTH CARE PROFESSIONALS

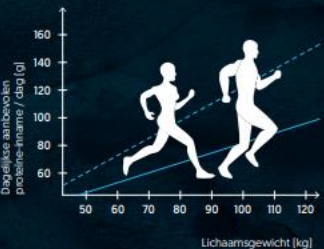
## WAAROM PLANTAARDIGE EIWITTEN

Eiwitten zijn een combinatie van aminozuren. Er zijn 20 verschillende aminozuren, waarvan er 9 essentieel of onmisbaar worden genoemd, omdat ze niet door het menselijk lichaam kunnen worden aangemaakt en dus via de voeding moeten worden opgenomen.



### DE EIWITAANBEVELINGEN?

Voor een typische volwassene met een normale lichamelijke activiteit en een energiebehoefte van 2000 kcal bedraagt de aanbevolen dagelijkse eiwitinname 0,8 g/kg/d. Voor duursporters stijgt deze inname tot 1,2 g/kg lichaamsgewicht/dag<sup>1</sup>.



**Actieve sporters**  
(4 tot 5 trainingen / week van minstens 1 uur): 1,2g/kg lichaamsgewicht / dag<sup>1</sup>

**Minder actief of recreatieve sporters**  
0,83g/kg lichaamsgewicht / dag<sup>1</sup>

<sup>1</sup> Hoge Gezondheidsraad, Voedingsaanbevelingen voor België, 2016, Brusselles: CSS, 2016, Avis n° 9285

## JOUW HEERLIJKE BRON VAN PLANTAARDIGE PROTEÏNEN\*



\*Proteïnen dragen bij tot de groei en het behoud van spieren. Een gevarieerde en evenwichtige voeding en een gezonde levensstijl zijn belangrijk voor een goede gezondheid.

### NIEUW ALPRO GAMMA!

	choco 50ml	Drink caramel koffie 250ml	Pudding vanille	Pudding choco
3/75	300/72	399/95	399/95	
3	2,8	2,5	2,9	
0,6	0,5	0,5	0,8	
5,2	5	7,7	6,5	
4,9	4,9	4,9	4,9	
1,3	0,9	1	1,7	
6,1	6	10	10,2	
0,2	0,15	0,41	0,42	
0,75	0,75	0,75	0,75	
0,21	0,21	0,21	0,21	
125	120	120	120	

### HET ALPRO PROTEÏNE ASSORTIMENT

- ✓ Hoog in proteïnen
- ✓ Hoogwaardige plantaardige eiwitten (soja)
- ✓ Laag in suikers
- ✓ Van nature laag in verzadigde vetten
- ✓ Lactosevrij
- ✓ Nutriscore A
- ✓ 100 % plantaardig





DANONE

HiPRO



# WE'RE HIPRO AND THIS IS OUR WORLD.

We're a bunch of protein-nuts who are just as crazy about sports and performances as you. We're experts in making delicious, clean, protein-based food that will work as hard as you do to feed your need.



Because we think you Pro Amateurs are the real heroes, we want to give you the right food, to show up and support you and to doing that responsibly so that you can do what you do best



## BROAD CHOICES WITH CONTINUED INNOVATION

## DRINKS



9 EAA  
25g/300ml



## SPOONS



## DESSERTS





# STRONG INFLUENCER SQUAD

Lotte Kopecky

Cynthia Bolingo

Bashir Abdi

Oshin Derieuw

Anne Zagre

Ambre Ballenghien



Imke Vervaet

Delphine Nkansa

Elise Vandereslt

Walid Deghali

Arthur Van Doren



# IMPORTANCE OF HEALTH CARE PROFESSIONALS

## AANBEVELINGEN VOOR ATLETEN?

- Grotere aanvoer van eiwitten



**Regelmatische aanvoer van eiwitten:**  
• 4 tot 5 keer per dag  
• Ongeveer 20 g eiwitten om de 3 à 4 uur

- Te weinig eiwitten kan leiden tot:

- Een afname van de spiermassa, kracht en spierfunctie
- Een tragere heropstart
- Blessures, ziektes en intolerantie bij het trainen<sup>[1]</sup>

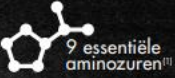
Let op: een gevarieerde en evenwichtige voeding is een vereiste.

Een overmatige inname van eiwitten kan ook invloed hebben voor de kwaliteit van de botten, een hoger risico op cardiovasculaire aandoeningen, kanker, obesitas en een toename van nierziektes.<sup>[2]</sup>



# HiPRO

HET GAMMA PROTEÏNEPRODUCTEN



OM TE DRINKEN OF IN EEN **POTJE**, EN AFHANKELIJK VAN DE **EIWITBEHOEFTE**, ER IS VOOR ELK WAT WILS!

Smaken:



**HiPRO potje**  
15g eiwit/portie  
Bevat lactose



**HiPRO pudding**  
20g eiwit/portie  
Bevat lactose

Smaken:



**HiPRO drink**  
(Gekoeld)  
25g eiwit/portie  
5,1g BCAA  
& lactosevrij



**HiPRO drink**  
(niet gekoeld)  
25g eiwit/portie  
5g BCAA  
& lactosevrij



**HiPRO Mousse**  
20g eiwit/portie  
Bevat lactose

**HiPRO bevat 30% (potje), 40% (mousse en pudding) tot 50% (drink) van de referentie-inname eiwitten van een gemiddelde volwassene per portie.**

Gemiddelde voedingswaarden	Potje per 100g	Pudding per 100g	Drink gekoeld per 100g	Drink niet gekoeld per 100g	Mousse per 100g
Energie (kJ/kcal)	237/56	328/78	251/59	223/53	360/86
Vetten (g)	0,2	1,7	0,5	0,3	2,3
waarvan verzadigde vetzuren (g)	0,1	(1,1)	0,3	0,2	1,6
Koolhydraten (g)	3,8	5,6	5,5	4,9	5,6
waarvan suikers (g)	3,4	3,3	5,3	4,8	4,3
Vezels (g)	0,7	<0,1	<0,1	0,3	1,2
Eiwitten (g)	9,4	10,1	8,3	7,6	10
Zout (g)	0,1	0,27	0,17	0,20	0,02
Calcium (mg)	100	320	175	255	222

Een gezonde, gevarieerde en evenwichtige voeding, inclusief zuivelproducten, zorgt voor een toereikende eiwitinname voor de bevolking. Atleten hebben extra eiwitinname nodig, afhankelijk van hun profiel.

<sup>[1]</sup> Zoals alle zuivelproducten

## EIWITTEN ALS BASIS VOOR EEN GEVARIEERDE EN EVENWICHTIGE VOEDING

- Dagelijkse inname noodzakelijk
- Afwisseling tussen plantaardige en dierlijke eiwitbronnen



## HOEVEELHEID EIWITTEN NAARGELANG HET PROFIEL

- Lichaamsgewicht

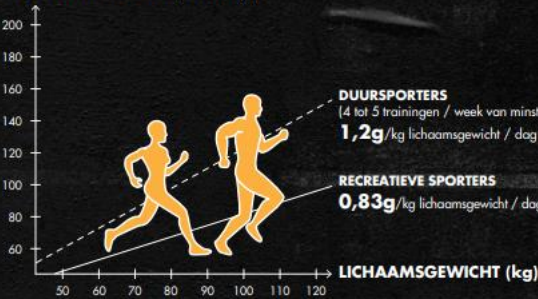


- Fysieke inspanningen (soort sport):

- Frequentie van de trainingen
- Intensiteit van de trainingen



## DAGELIJKE AANBEVOLEN PROTEÏNE-INNAME / DAG (g)



Bron : Hoge Gezondheidsraad. Voedingsaanbevelingen voor België - 2016. Brussel, HGR, 2016. nr. 9285.

<sup>[1]</sup> Hoge Gezondheidsraad. Voedingsaanbevelingen voor België - 2016. Brussel, CSS, 2016. Advies nr. 9285.

<sup>[2]</sup> CERIN - Proteins and sport activity - 2016

shouden  
in het lichaam.

Corrected  
reducten zijn  
arheid.

or levensmiddelen die

<sup>[1]</sup> ISSN exercise & sports nutrition review update: research & recommendations, Kerkhofs et al. Journal of the International Society of Sports Nutrition (2018) 15:38

<sup>[2]</sup> Adverse Effects Associated with Protein Intake above the Recommended Dietary Allowance for Adults, Delmarcel, ISRN Nutr. 2013







**Hipro**  
**25g PROTEINES**  
SAVEUR VANILLE-COCA

A grayscale photograph of a cyclist leaning into a turn on a road bike. The cyclist is wearing a helmet, sunglasses, and a dark jersey. The background shows a road with white lane markings and some foliage. The text "SEE YOU AROUND THE CORNER!" is overlaid in white, bold, sans-serif font.

**SEE YOU AROUND THE  
CORNER!**

# Thank You

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