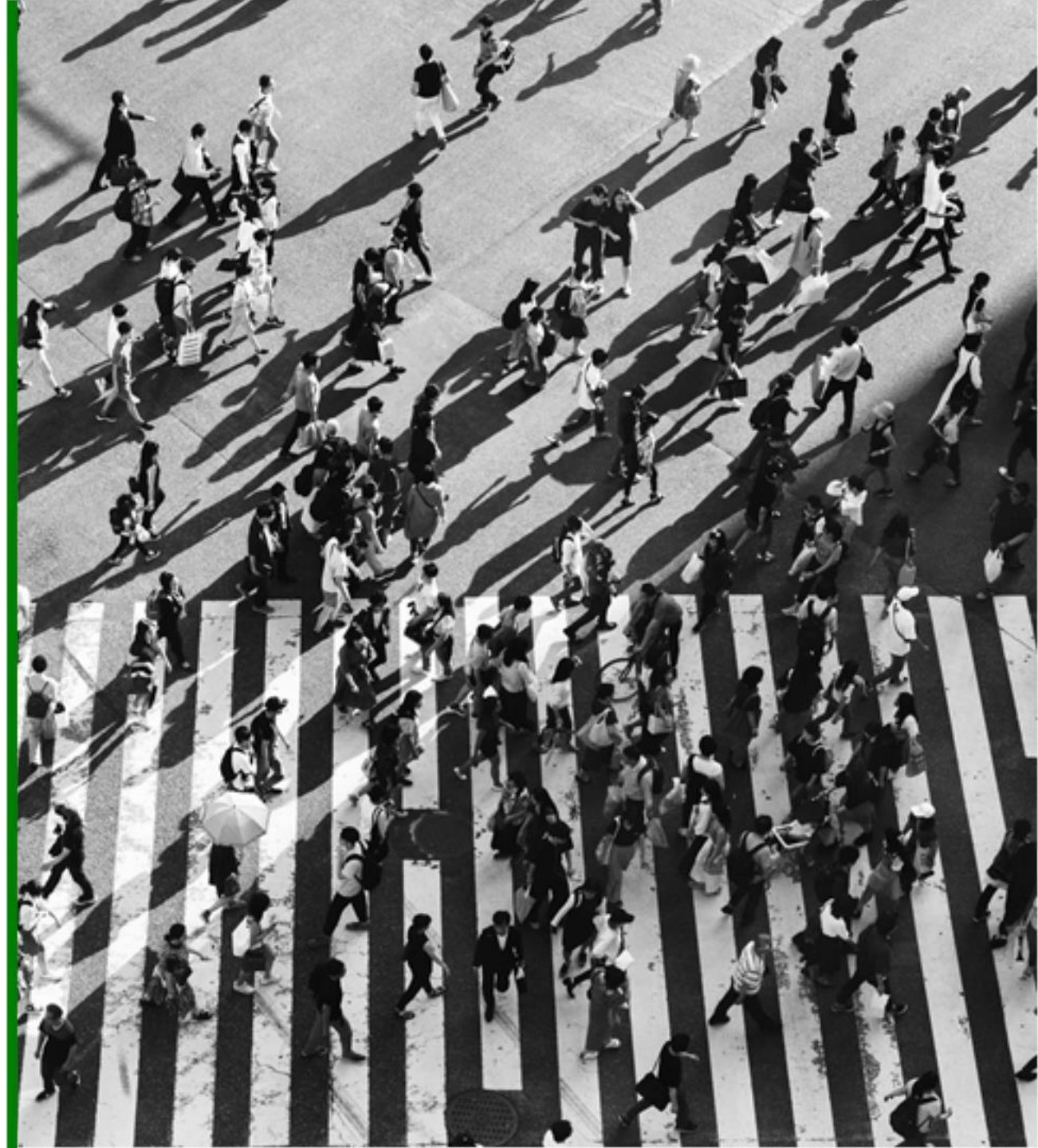




Lux for Consumer Insights

TRENDS (3X)

Protein and European Consumer Culture



Executive Summary

Protein has become one of the most influential forces shaping contemporary food and beverage culture. Consumers increasingly look to protein to address multiple needs, from energy and satiety to healthy aging, weight management, muscle maintenance, and overall wellness. At the same time, brands are bringing protein into traditionally indulgent foods, blurring the boundaries between health, function, and pleasure. In the U.S., everyday protein culture has embraced fortified foods, macro tracking, and body optimization. However, innovators should be cautious about mapping America's distinct protein culture onto European consumers. Doing so risks importing an approach to nutrition, routines, and taste-related pleasure that can sit uneasily with Europe's deeply rooted food traditions.

In Europe, protein is becoming more important without necessarily becoming the organizing principle of the diet. Consumers want protein to make familiar foods work harder for them while preserving balance, quality, pleasure, and established ways of eating. This creates a distinctly European opportunity: not simply to add more protein, but to make protein feel like a credible and natural extension of everyday food culture. In this report, we explore the drivers, need states, and tensions shaping that opportunity.

Key Research Question

- What does protein represent in contemporary food culture, and how are evolving beliefs about health, performance, satiety, aging, and wellbeing influencing the consumption of protein-rich foods and snacks?



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- 2** Key Consumer Themes
- 3** Zone of Innovation
- 4** Lead Consumers in this Culture
- 5** Appendixes





Culture Overview



EU consumers want daily protein that supports muscle, energy, and satiety, and fits as a convenient part of everyday eating.

Across the EU, consumer interest in protein is driven by a desire for boosting everyday wellness through a balanced and intentional approach to eating.

The culture of protein sits in the **Mainstream Acceptance** stage of development. Currently, a maximum of 116.2M consumers are showing interest in this topic, and this number is poised to grow by 35.5% in the next 1-2 years.

Strategic Implications

Protein as Everyday Nutritional Competence. Brands should position protein as an everyday dietary staple rather than a performance enhancer, appealing to a wide range of consumer lifestyle across age demographics.

Convenience wins—but only when it reinforces healthy eating. Consumers expect those products to complement, not replace, a balanced diet. The opportunity isn't meal replacement; it's making healthy eating easier to sustain.

Innovation should upgrade familiar eating habits, not ask consumers to change them. The strongest opportunities lie in enriching foods people already enjoy rather than introducing entirely new eating occasions or highly specialized products.

The next competitive battleground is protein quality, not protein quantity. Consumers increasingly evaluate where protein comes from, how it is processed, whether it fits their health values, and whether the product delivers credible nutritional benefits beyond a high-protein claim.

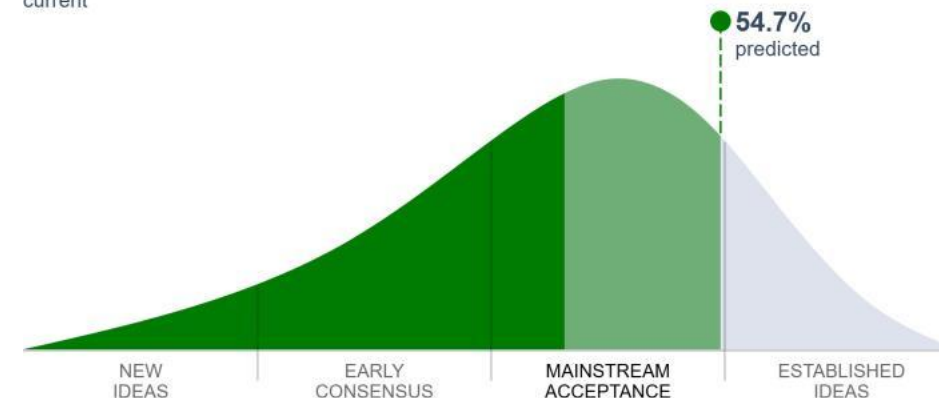
Culture Overview

Across the EU, interest in and awareness of protein are high and have broken out of the performance/gym-mindset bubble. **This culture sits right at the heart of the Zone of Innovation:** the growing consensus around the meaning of protein in consumers' everyday lives makes the terrain ripe for innovative solutions that target consumers' burgeoning nutritional awareness and increasing desire for convenient, balanced, high-quality protein sources. **Brands will win by offering simple, credible daily protein solutions that fit busy routines, deliver predictable fullness, and preserve EU consumers' attachment to traditional foodways.**

Maturity Curve for Protein

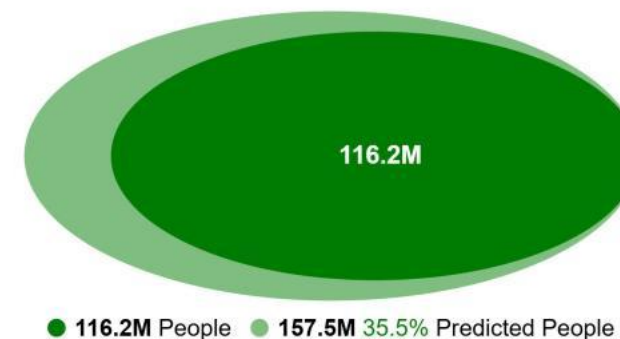
Maturity Curve

40%
current



This topic scores **40%** on the maturity curve and is expected to expand to **54.7%** in 12-24 months.

This culture is currently relevant to **116.2M** people and is expected to grow by **35.5%** in 12-24 months.





Key Consumer Themes



Here are the five themes relevant to Protein:

- 1 Protein in the EU: Wellness Beyond the Gym**
Protein = seeking a real nutrient boost that fits their routine and wellness goals.
- 2 Germany: Achievable Nutrition**
Protein = simplifying healthy eating amid nutritional complexity by upgrading familiar foods
- 3 UK: Taking Charge of their Wellbeing**
Protein = borrowing the performance mindset to feel more capable and in control of everyday health.
- 4 Spain: Real Food for Longevity**
Protein = using familiar Mediterranean foods to support strength, satiety, and longevity.
- 5 France: Building Health, Not Hype**
Protein = trusting the protein claim only when the whole product earns nutritional credibility.



Protein in the EU: Wellness Beyond the Gym

Protein = seeking a real nutrient boost that fits their routine and wellness goals.



Protein = seeking a real nutrient boost that fits their routine and wellness goals.

CORE BELIEF

- **Consumers believe that** protein has evolved from an elite performance fuel to an everyday building block for living well because it is a tool for proactively caring for their bodies and supporting how they want to feel, function, and age. They believe that healthy eating means consciously focusing on the amount and quality of protein they consume, whether through balanced, trusted whole foods or convenient protein products that make self-care and body optimization easier to sustain as part of everyday life.

MANIFESTATIONS

- **Consumers say increasing protein makes healthy eating and good nutritional maintenance more achievable, even when everyday life disrupts regular meals.** E.g. Since protein promotes satiety, muscle health, and sustained energy, consumers increasingly rely on convenient protein products to bridge busy mornings, missed lunches, travel, or post-work fatigue, giving them a practical way to eat consistently healthy, without having to prepare balanced meals every time.

- They note that quality matters as much as quantity, leading them to align protein intake with their health goals, values, and body needs (rather than just maximizing protein). E.g. Consumers distinguish between protein sources (dairy, whey, eggs, legumes, or plant proteins) and expect products to communicate why a particular source is beneficial; whether for muscle maintenance (e.g. amino acid profile), digestibility (whey isolate), or sustainability (plant-based protein).
- **Consumers think protein must earn its place in their routines via trustworthy sourcing, transparent ingredients, and convenient formats to complement—not replace—real food.** E.g. They talk about welcoming protein-enhanced products when said products feel like credible extensions of a healthy diet, but remain skeptical of products that rely on protein claims, while appearing overly processed or nutritionally questionable.

Germany: Achievable Nutrition

Protein = simplifying healthy eating amid nutritional complexity by upgrading familiar foods



Protein = simplifying healthy eating amid nutritional complexity by upgrading familiar foods

CORE BELIEF

- **Consumers believe that** protein is a hack that supports and maintains healthy eating habits amid growing nutritional complexity. They believe that increasingly fragmented nutrition advice and modern food trends prioritize narrow optimization over practical health. As a result, they embrace protein as a confidence-enhancing nutritional tool that helps them eat more healthfully and intentionally each day.

MANIFESTATIONS

- **Consumers discuss how protein should fortify and enhance foods and meals they already eat, because improving nutrition shouldn't require abandoning familiar routines.** E.g. They point to Dr. Oetker High Protein Rice Pudding, which makes a traditional comfort food more filling without changing how it's prepped or consumed. Consumers also highlight products like indulgent Ehrmann Protein Puddings, which turn a familiar everyday dessert into a more nourishing snack.
- **Some discuss protein as an easy way to identify healthier food options, because it provides a simple nutritional cue in place of increasingly complex dietary advice.** E.g. Consumers choose naturally protein-rich foods like Skyr, because they provide confidence they are eating well without having to compare nutritional claims across products. They also add products like Kaufland whey protein to homemade meals like stews, thereby enriching familiar recipes instead of redesigning meals around changing dietary recommendations.
- **Consumers discuss how high-protein foods should meet a genuine nutritional purpose, because healthy eating means balancing nutrients to meet individual needs, not constant optimization.** E.g. They criticize brands like More Nutrition for promoting specialized protein products to everyday consumers, when balanced diets should be sufficient. They reserve products like ESN protein powders for specific needs (post-workout recovery, sustained mental focus, etc.), arguing that protein should solve said needs instead of being packed into everything.

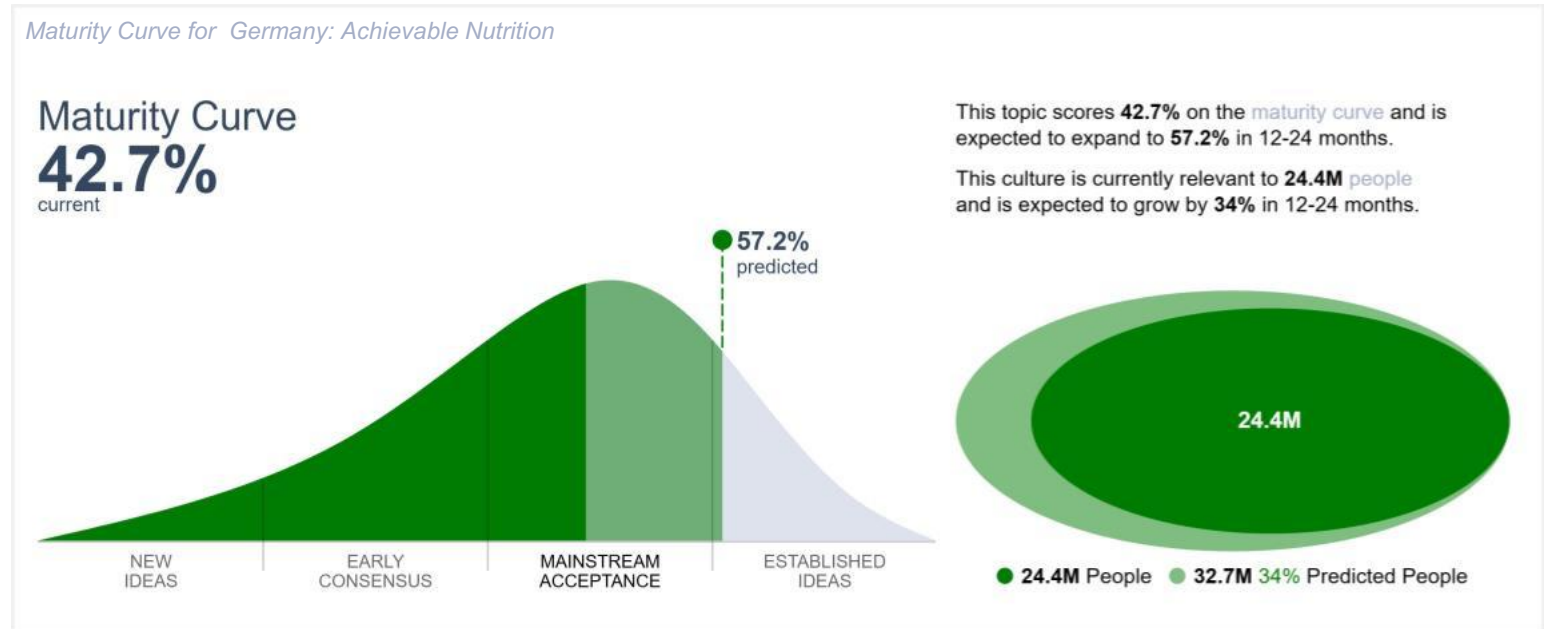
Protein = simplifying healthy eating amid nutritional complexity by upgrading familiar foods

Conversation Topics Decoded

stew (Eintopf), familiar foods (vertraute Lebensmittel), everyday routines (Alltagsroutinen), nutritional shortcuts (Abkürzung zur gesunden Ernährung), healthy choices (gesunde Wahl), nutritional confidence (Ernährungssicherheit), satiety (Sättigung), healthy aging (gesundes Altern), balanced nutrition (ausgewogene Ernährung), individualized nutrition (bedarfsgerechte Ernährung), Dr. Oetker, Skyr, skepticism of optimization (Skepsis gegenüber Optimierung), functional protein (funktionelles Protein), familiar recipes (vertraute Rezepte)

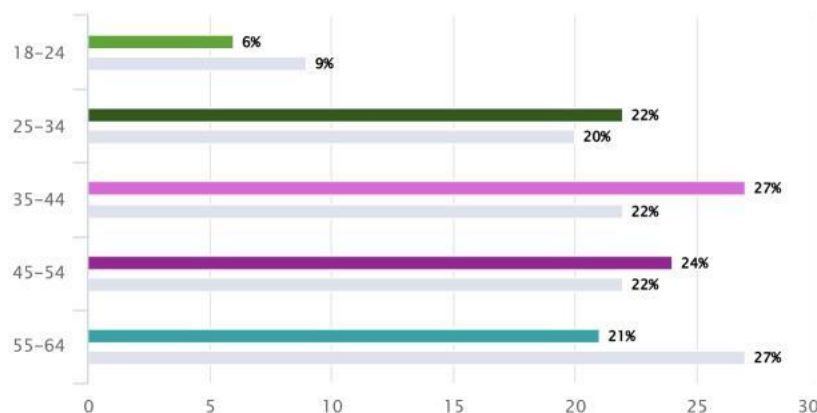
The culture of protein in Germany is projected to become one of the most mature over the next 1-2 years.

Germany: Achievable Nutrition is currently relevant to **24.4M** consumers and is anticipated to **grow by 34.0%** in the next 12-24 months.

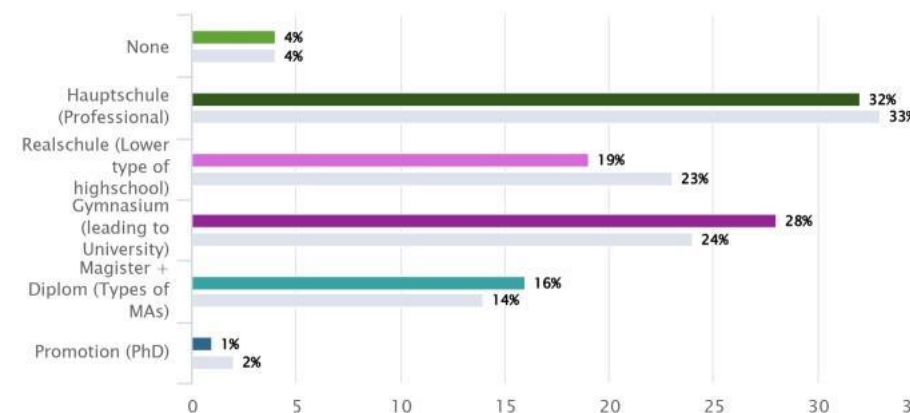


German Millennials who are married with children are lead consumers in this study.

Age (Germany)



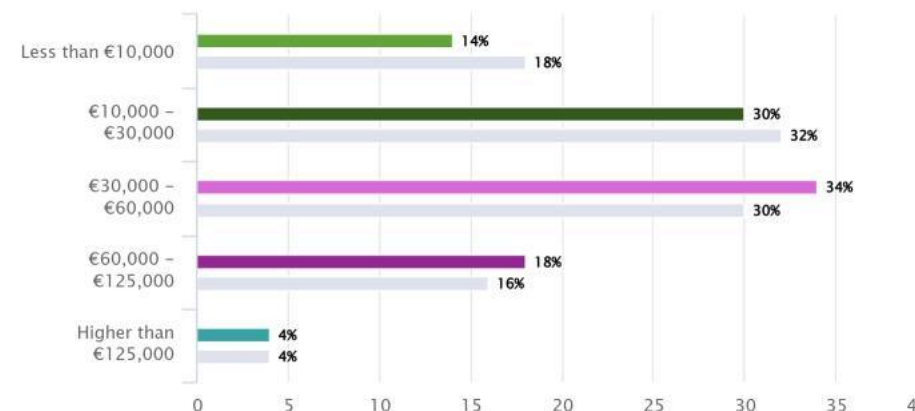
Education (Germany)



Family (Germany)



Income (Germany)



UK: Taking Charge of their Wellbeing

Protein = borrowing the performance mindset to feel more capable and in control of everyday health.



Protein = borrowing the performance mindset to feel more capable and in control of everyday health.

CORE BELIEF

- **Consumers believe that** protein allows them to apply the logic of performance nutrition to everyday wellbeing, giving them a practical way to take greater control of how they feel and function. Rather than pursuing athletic optimization, they use protein to support satiety, sustained energy, strength, mobility, and healthy aging through achievable daily routines.

MANIFESTATIONS

- **Consumers say they rely on protein (rather than energy depleting empty carbs) to make meals more filling and energizing, helping them stay satisfied for longer.** E.g. They talk about wanting to infuse more protein into their breakfasts with protein shakes or yogurt (e.g. Arla Skyr), and they opt for protein-dense snacks like turkey roll-ups or roasted chickpeas to keep them going.

- **They think protein supports active bodies, leading them to increase daily protein for strength, mobility, and healthy aging (without committing to fitness-focused lifestyles).** E.g. Consumers chat about Müller x Myprotein protein puddings and shakes that have 20g of protein, seeing snacks and supplements like these as routine-ready ways to boost protein intake and fuel their bodies, even if they aren't fitness fanatics.
- **Consumers pay special attention to protein sourcing and quality, looking to avoid overly processed ingredients and increasingly sharing interest in plant-based protein.** E.g. They say they value protein products that flag “complete protein” or an amino-acid profile, thinking these are better for their body and goals. Consumers express an interest in plant-based protein as a clean supplement option.

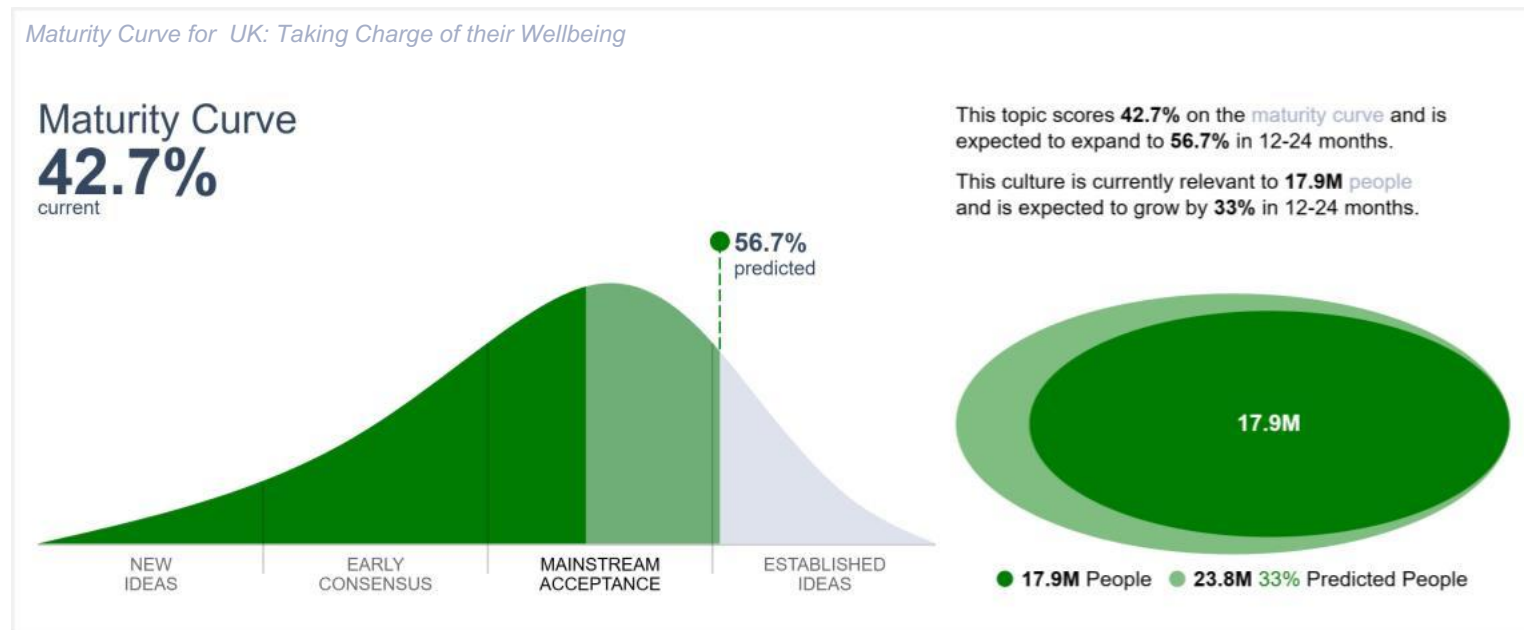
Protein = borrowing the performance mindset to feel more capable and in control of everyday health.

Conversation Topics Decoded

adequate protein, supplements,
processed foods, protein target,
yogurt, pea protein, glycemic load,
quick energy, filled breakfast,
incomplete protein, whey, energy
throughout the day, instant oats,
macro nutrients, add protein
powder, creatine, amino acids,
plant base protein powder, scoop of
vanilla, snack, skyr

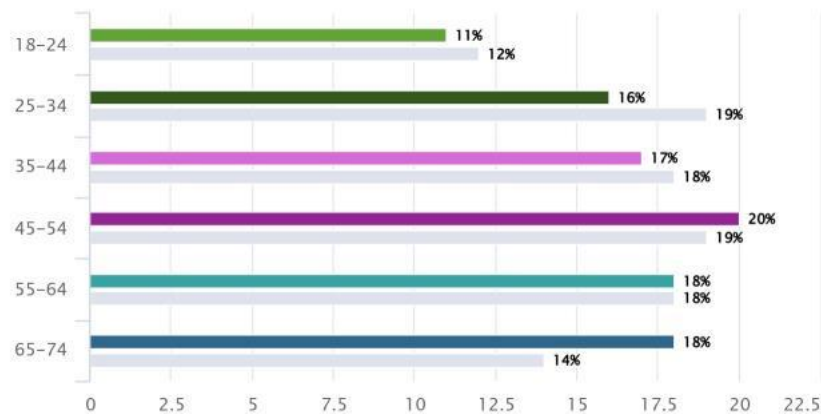
Protein in the UK is growing within the heart of the Zone of Innovation.

UK: Taking Charge of their Wellbeing is currently relevant to **17.9M** consumers and is anticipated to **grow by 33.0% in the next 12-24 months.**

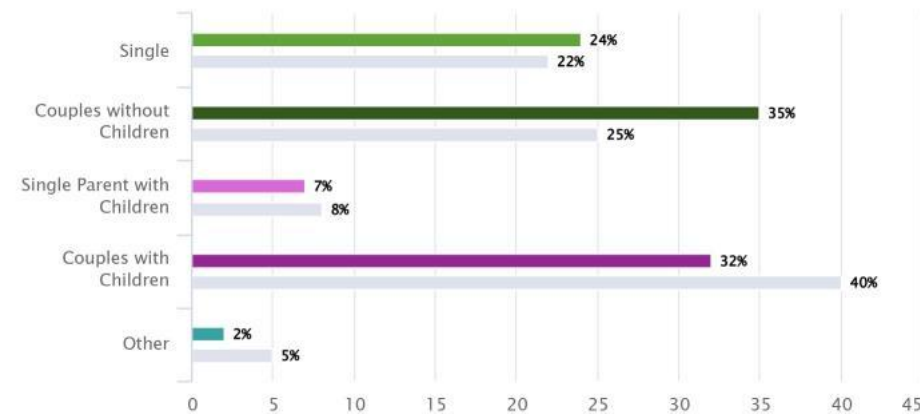


These U.K. consumers are more likely to be educated couples without kids.

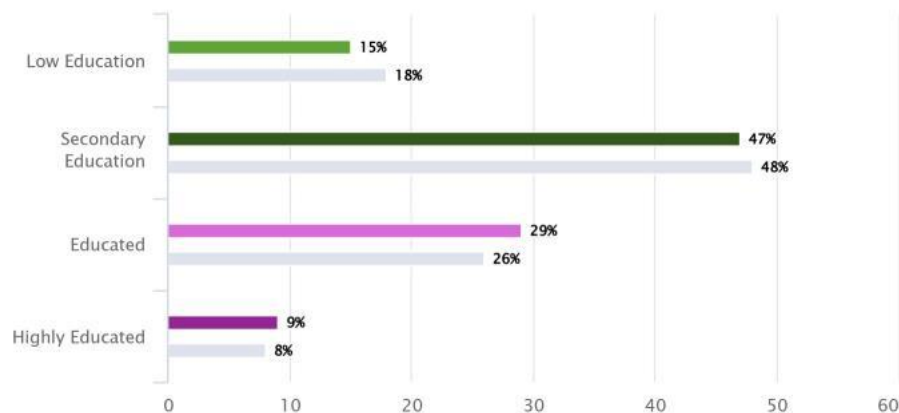
Age (UK)



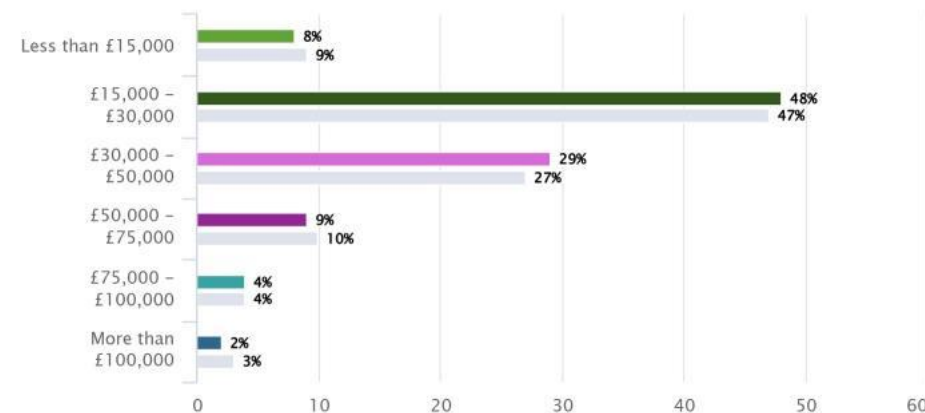
Family (UK)



Education (UK)



Income (GBP)



Spain: Real Food for Longevity

Protein = using familiar Mediterranean foods to support strength, satiety, and longevity.



Protein = using familiar Mediterranean foods to support strength, satiety, and longevity.

CORE BELIEF

- **Consumers believe that** protein helps them get more from the way they already eat, making everyday meals work harder to support strength, satiety, healthy aging, and an active lifestyle. They believe that the right approach to protein isn't about maximizing intake, but rather practical incorporation into a routine that aligns with familiar, pleasurable foodways.

MANIFESTATIONS

- **Consumers associate balanced protein intake with energy, aging well, and satiety, seeing protein as a way to ensure their food supports longevity and vibrancy.** E.g. They chat about whole food proteins like chicken breast and garbanzo beans, as well as protein-enhanced desserts (Hacendado mousse and pudding) as indulgent yet health-forward treats.
- **They discuss how the traditional Spanish diet aligns with their protein goals, saying they want to focus on its balanced, minimally processed meals to maintain protein intake.** E.g. Many discuss how the native Mediterranean diet of Spain prioritizes moderate animal protein like eggs and oily fish, which make them feel energized and sated. Some are concerned to learn that many Spaniards overconsume protein, worrying that an unbalanced protein intake can cause health problems.
- **Consumers say protein supplements are rarely necessary unless they're body-building, worrying that processed protein powders are no more efficient than whole foods.** E.g. Performance-minded consumers complain about the price of HSN whey protein, and they express how chicken, eggs, or dairy provide better value than expensive powders. Non-performance consumers are wary of advertising and advice that pushes protein supplements on them.

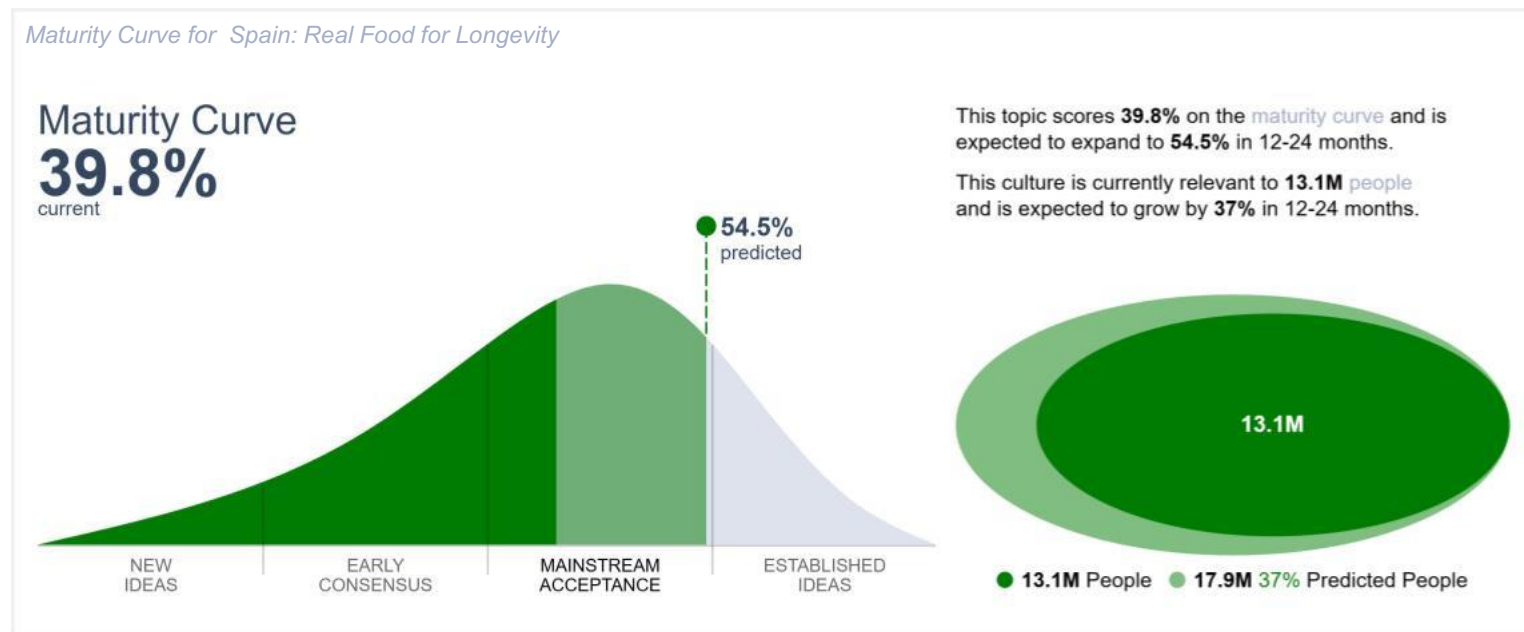
Protein = using familiar Mediterranean foods to support strength, satiety, and longevity.

Conversation Topics Decoded

protein (proteína, la prote) whey
protein (proteína whey), animal
protein (proteínas de origen
animal), balanced diet (una dieta
equilibrada), Mediterranean diet (la
dieta mediterránea), processed
foods (alimentos procesados)
pudding (natillas), dairy dessert
(postre lácteo), quality (calidad),
price (precio), body builder
(culturista), chicken (pollo), protein
powder (proteína en polvo),
longevity (la longevidad), too much
protein (demasiada proteína),
macronutrient (macronutriente)

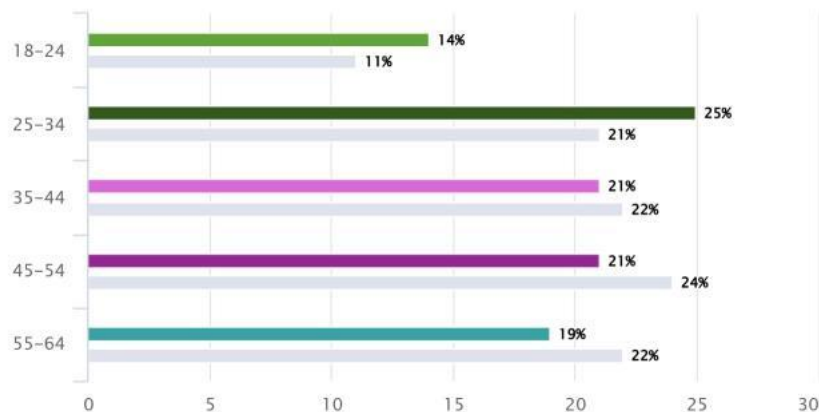
Conversations around protein are continuing to grow among Spanish consumers.

Spain: Real Food for Longevity is currently relevant to **13.1M** consumers and is anticipated to **grow by 37.0%** in the next 12-24 months.

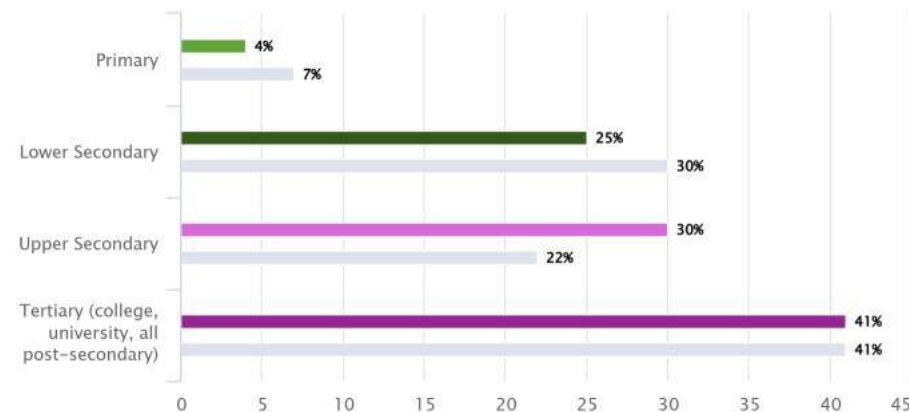


Spanish protein consumers lean towards higher educated couples with kids.

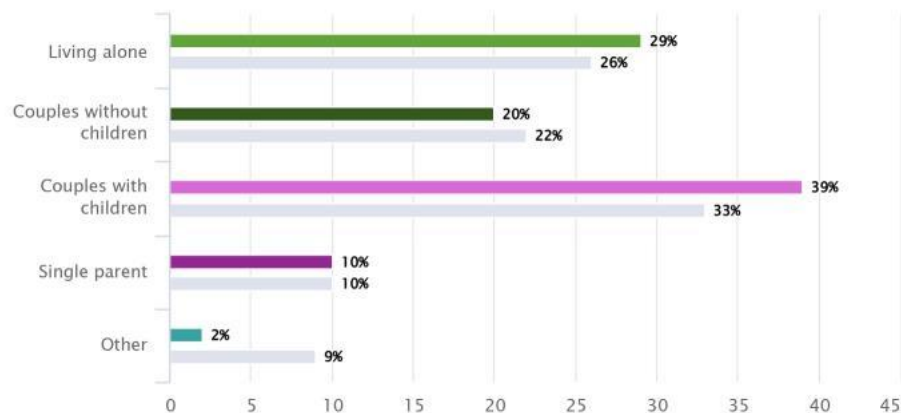
Age (Spain)



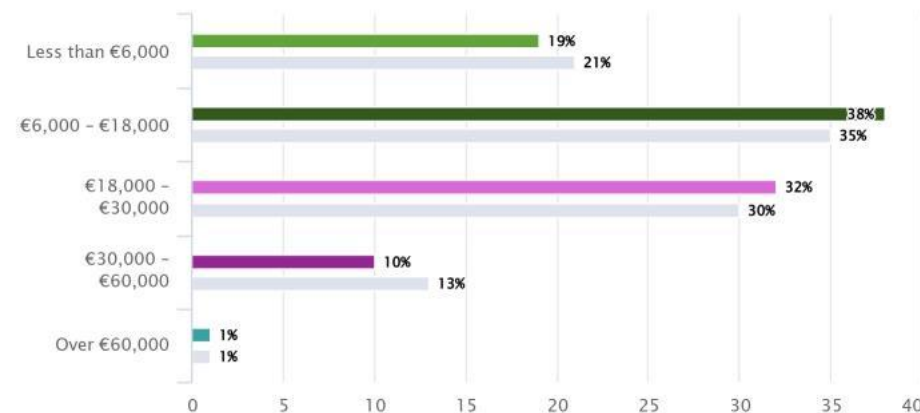
Education (Spain)



Family Type (Spain)



Income (Spain)



France: Building Health, Not Hype

Protein = trusting the protein claim only when the whole product earns nutritional credibility.



Protein = trusting the protein claim only when the whole product earns nutritional credibility.

CORE BELIEF

- **Consumers believe that** protein serves as an important building block in a well-rounded approach to nutrition, but not as a nutritional shortcut or a goal in isolation. They see it as their responsibility to look beyond the protein hype and scrutinize marketing claims, seeking quality options grounded in natural, wholesome protein sources that deliver meaningful nutritional benefits.

MANIFESTATIONS

- **Many discuss assessing their intake and nutritional needs before turning to protein-enriched products, treating them as flexible top-ups when everyday diets fall short.** E.g. They prioritize naturally protein-rich foods (cottage cheese, eggs, chicken breast), while using products like Charles Vignon Organic Crunchy Protein Muesli when they need additional support for weight management, poor appetite, or age-related muscle loss. They also say protein's benefit depends on an otherwise healthy, balanced diet that includes fiber, carbohydrates, and micronutrients.

- **Consumers prefer products enriched via naturally protein-rich ingredients rather than isolated protein extracts, which they associate with processing and limited nutrients.** E.g. They mention trusting dairy, soy, and whole grains as credible sources, showing interest in products like Danone Vanilla Drinking Skyr or Alpro Natural Protein Soy Drink. By contrast, many view the addition of extracted protein to products such as NUTRISENS Lemon Protein Biscuits as an attempt to health-wash an ultra-processed food.
- **They discuss looking beyond the high-protein label and judging the products as a whole, arguing that a meaningful option must also have a healthy overall nutritional profile.** E.g. They may reject products such as Feel FIT Protein Peanut Butter Chocolates when the sugar and fat content conflict with the promise of a healthy snack, while choosing alternatives such as HiPRO Chocolate Hazelnut Protein Dessert Cream (high protein, no added sugar). They also scrutinize ingredients like artificial colorings and palm oil, which they link to long-term health risks.

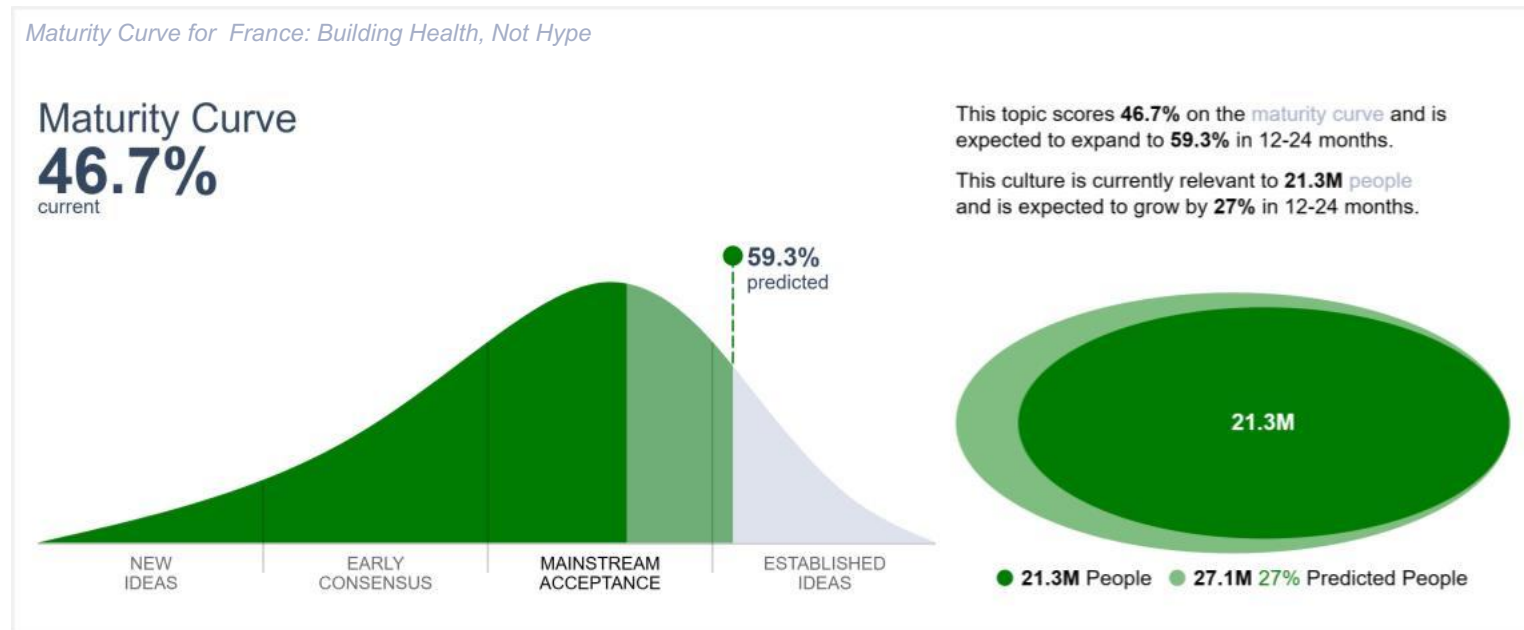
Protein = trusting the protein claim only when the whole product earns nutritional credibility.

Conversation Topics Decoded

protein products (produits protéinés), lose weight (perdre du poids), seniors, vegetarians (végétariens), fats (matières grasses), calories, healthy diet (régime sain), cottage cheese (fromage blanc), eggs (œufs), Skyr, ultra-processed products (produits ultra-transformés), whole wheat (blé complet), marketing, added sugars (sucres ajoutés), naturally protein-rich ingredient (ingrédient naturellement protéiné), extracted proteins (protéines extraites), yogurt (yaourt)

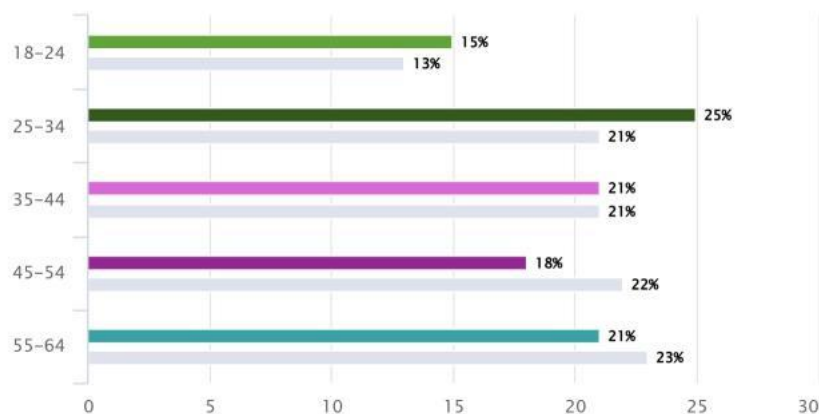
Conversations around protein in France are moving into the Established Ideas territory over the next 1-2 years.

France: Building Health, Not Hype is currently relevant to **21.3M** consumers and is anticipated to **grow by 27.0%** in the next 12-24 months.

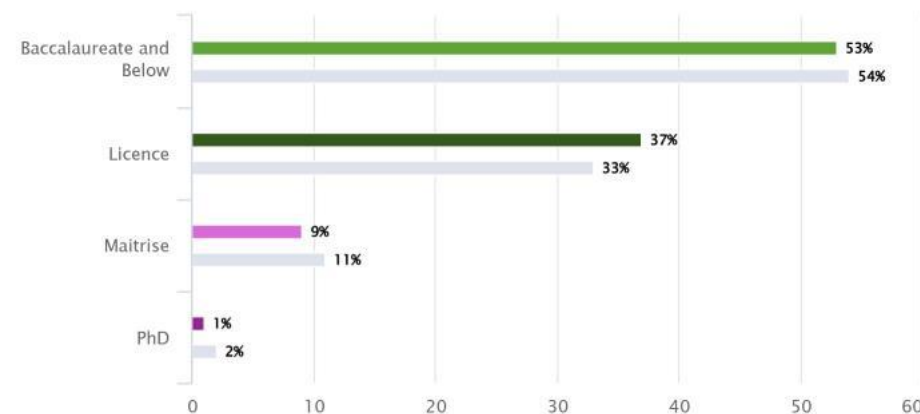


These French consumers are more likely to be aged between 18-34 and have a college education.

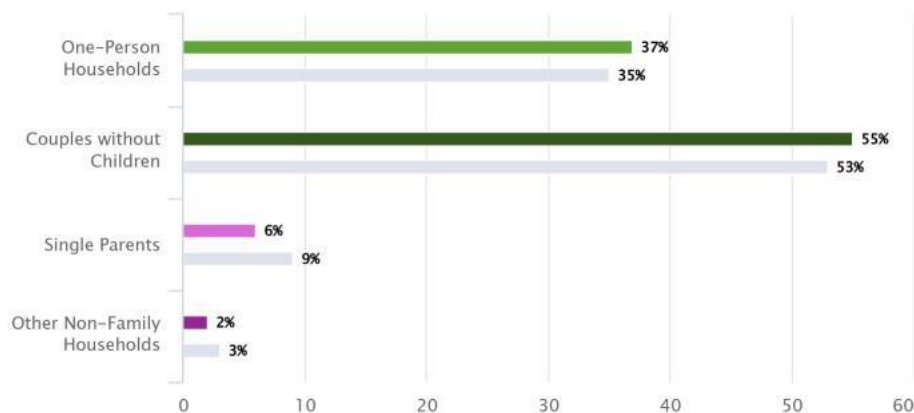
Age (France)



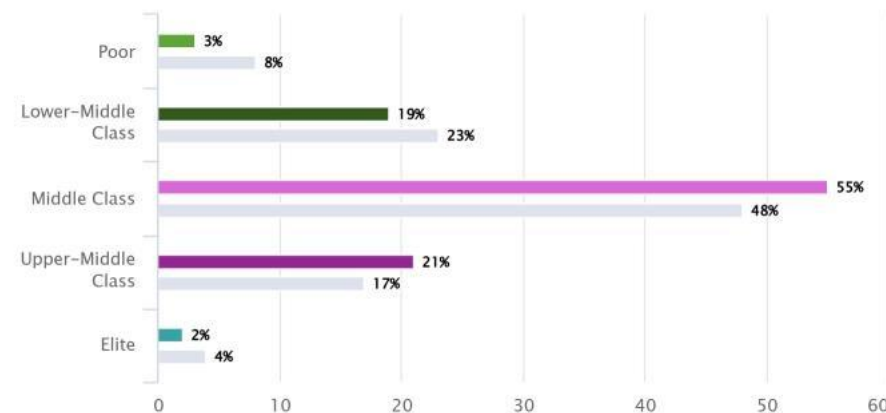
Education (France)



Family (France)



Class (France)





Zone of Innovation



Current & Future State: Where consumer conversations are heading



HOW TO INTERPRET

Through more than 200 benchmarking experiments, Lux Research has learned that the key time to launch a solution into market is when a demand space falls between 33% - 55% on the maturity curve. That is, it ideally falls in the mainstream acceptance stage of maturity.

When we look at demand spaces and their predictions through Lux Research, we recommend focusing on those opportunities that will fall into the zone of innovation in the future (through the prediction capability). This ensures that we prioritize those opportunities that will not only fall within the zone of innovation but also provide us the runway needed (time) to bring something powerful into market in a timely manner.

Methodology



Using this Report

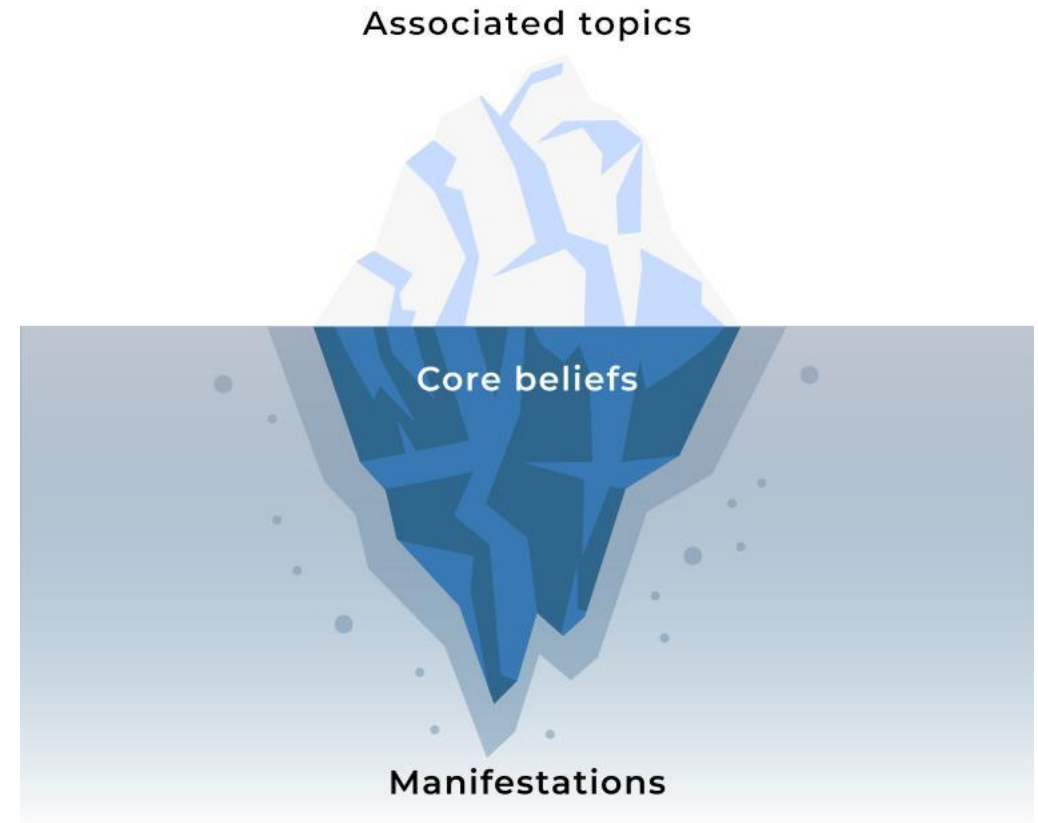
The question we examine in this report concerns the culture being established in consumer conversations. Our work is to decode meaning from the topics consumers associate to determine how they truly understand your subject.

At the top of the iceberg are those associated topics. They are helpful and provide guidance, but they reveal only about 30% of consumers' understanding.

The middle of the iceberg contains the dominant core beliefs that shape how consumers interpret the culture.

The bottom of the iceberg houses the manifestations of those beliefs—the behaviors, opinions, and solutions consumers adopt. Because manifestations shift frequently while core beliefs remain steady, strategies built on manifestations alone chase fleeting trends. Strategies grounded in core beliefs achieve consistency and clarity—both in execution and in how consumers perceive the brand. Yet core beliefs also require careful navigation; misalignment can collide with a belief system and damage a brand.

This is why Lux employs a deep anthropological model to study meaning within culture.



How does it work?

Contextual Intelligence: The key to Lux's approach to Consumer Insights

"We need to go beyond mentions to understand what people mean when they say things, because human-centric insight is at the root of all successful innovation. " - Marisa Kopec, Lux Research President

Lux's predictive anthropology—our proprietary method combining structural anthropology and big data—reveals and predicts how consumer beliefs evolve.

Unlike social listening, which tracks mentions, structural anthropology shows that meaning emerges from how people use language in context. Lux analyzes the relationships between words, ideas, and trends over time, mapping how meanings shift.

This deeper approach uncovers consumers' core beliefs around any topic or trend—going beyond surface-level analytics to deliver real foresight.

THIS IS A BIG DATA ETHNOGRAPHIC ANALYSIS

This analysis is the result of Lux's algorithm studying consumer conversations and product reviews online.

100,000+

TOPIC INSIGHTS

Our predictive anthropology architecture and trained anthropologists have examined thousands of meanings consumers create around your topic to deliver deep ethnographic insights.

20,000+

UNIQUE INDIVIDUALS

Our predictive anthropology architecture has conducted an ethnographic analysis of thousands of individuals to quantify your search terms.



3X Market examined
August 2025 - July 2026



Where our data comes from

Lux's predictive anthropology decodes what topics truly mean to consumers—their symbolic and cultural significance, not just mentions. For example, chocolate cake isn't only "cake"; it represents irresistibility, celebration, aesthetic expression, and being a crowd-pleaser.

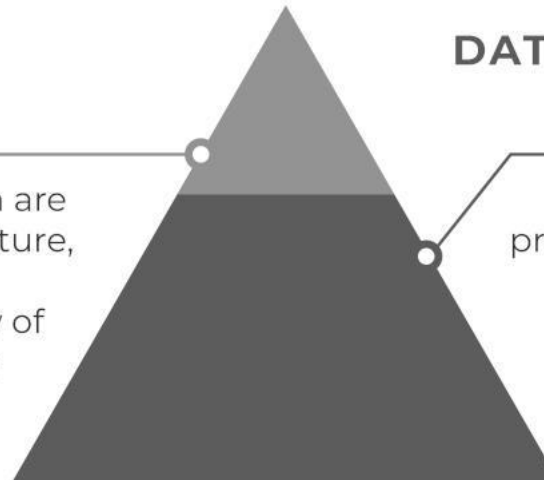
This decoding identifies the shared meanings that form themes, helping businesses understand how consumers relate to a topic—critical for innovation, messaging, and strategy.

DATA FROM FACEBOOK, INSTAGRAM, TWITTER

Platforms like Facebook or Instagram are not only a tiny piece of the overall picture, they also enable short/low quality interactions and give a distorted view of culture. Which is why it doesn't meet our quality criteria for big data ethnographic analysis.

DATA FROM PRODUCT REVIEWS, NEWS, FORUMS, YOUTUBE, BLOGS, ETC.

In order to enable real ethnographic analysis, our predictive anthropology architecture scrapes consumer interactions on platforms that enable pseudonymity and long-form conversation. Platforms like forums, blogs, comments under YouTube videos, news sites etc. make up our data sources. They also account for 95% of the activity on the internet.



ABOUT LUX

Our mission is to advise leaders about commercially viable science and technology to enable sustainable innovation. We deliver research and advisory services to inspire, illuminate, and ignite innovative thinking that reshapes and grows businesses. Using quality data derived from primary research, fact-based analysis, and opinions that challenge traditional thinking, our experts focus on finding truly disruptive innovations that are also realistic and make good business sense.

The “Lux Take” is trusted by innovation leaders around the world, many of whom seek our advice directly before placing a bet on a startup or partner — our clients rely on Lux insights to make decisions that generate fantastic business outcomes. We pride ourselves on taking a rigorous, scientific approach to avoid the hype and generate unique perspectives and insights that innovation leaders can’t live without.



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