



Nutri-Needs

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Consumers are no longer defined by traditional demographics alone – they are driven by individual needs, motivations and goals. That's where consumer insights come in.

"The food business never stands still," says Rory McDonnell, Vice President, Insight and Analytics at Glanbia.

An energy boost, a glow-up from within, stronger bones into old age – the benefits consumers look for in what they eat and drink are so many and so varied, [they take keen insights to decode](#).

"Last year, we made a conscious decision to take this right back to basics," says Rory. "We said – okay, we're in the better nutrition business. So what are the nutritional needs of consumers?"

"We did a piece of research based on 18,000 consumers in five markets – the US, the UK, France, India and Australia – that looks closely at consumers' nutritional needs and what they seek from nutritional products. And, because protein is so important to us as a category, we boosted the sample with people who consume protein powders," he says.

The team used a sophisticated piece of modelling to identify patterns in the data and pull results together into a framework – Nutri-Needs – that's relevant across the global business.

Three macro needs – Performance, Lifestyle and Aesthetics – were identified, as well as further sub-segments, including Mental Function, Form, Physical Function and Slim Down. Various associated micro needs were identified with each segment.

"This model gives us greater consumer insights in our emerging and established markets," Rory says.

"The good news is we can see common threads in what motivates people, even how they move through life stages," he says.

How does the Nutri-Needs model change things for Glanbia?

"Nutri-Needs allows us to manage our portfolio of well-loved brands more effectively," says Colin Westcott Pitt, Glanbia's Chief Brand Officer. "It has educated us and we can share the learning with customers to help build the category. And it helps us spot where there are gaps, where needs aren't currently being met, so we can innovate and fill them," he says.

The global data set was complex, without a doubt, "But we wanted to keep the storytelling simple so the framework is actionable," says Rory. "That's worked quite well."

Glanbia won three awards this year: two at the Marketing Institute of Ireland AIM Awards in Dublin – Gold for Insight and Market Research, and the Grand Prix as overall winner – and the Analytic Impact Award at the Marketing Society Research Excellence Awards for the work.

Category experts

On the ground, retailers are very engaged with Nutri-Needs in the US, where research was completed earlier than in other markets.

"We have a billion-dollar-plus brand – the biggest protein powder brand in the world and the number-one sports nutrition brand. We've taken a step back and looked at nutrition holistically," Rory says.

"It's what the biggest FMCG brands in the world do for their categories. We've done it for ours.

"Retailers have brilliant shopper understanding through millions of receipts. We have a unique consumer understanding – what happens after the store, when things get home.

"We can help by explaining how powders fit into the consumer's day: 'This is a night-time product,' or 'This is a morning-time product,' to help retailers plan their categories, their fixtures and the activation of marketing around them," he says. "The thought leadership we can bring to our retail partners is already leading to better conversations."

Clear brand identity and intelligent innovation – how Nutri-Needs helps

Nutri-Needs is an important portfolio management tool. Optimum Nutrition, for example, is firmly positioned in the Performance section of the Nutri-Needs wheel. "It's for people motivated by muscle and athletic performance. Whenever we see marketing or activation around the brand dragging it away from that position we can come back to the framework and re-anchor it where it needs to be," says Rory.

"Isopure is on a different part of the map. It plays to a different set of needs among people who are interested in form, physical appearance and getting lean," he adds. This kind of clarity helps brands to minimise overlap and go for growth with confidence.

The framework includes more detail on each need state and case studies inviting Glanbia brands to interrogate the experiences of other major FMCG brands who've used market segmentation to innovate, diversify and expand. "Nutri-Needs helps us spot market gaps and balance core products with high-growth innovations. It's powerful," Rory says.

Consistency across Glanbia's internal communications

The model gives Glanbia's global matrix of brand teams a common language for talking to one another internally. The teams refresh the Nutri-Needs data all the time.

"The foundational piece of work was done in 2024 but our insights work in years to come will be mapped back on to it to make sure it's still accurate," Rory says. "We will continue to monitor consumer needs and how they evolve within the Nutri-Needs framework, the consumer doesn't stand still – particularly in the health and nutrition space."

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