



Tapping into the active nutrition consumer

Gone are the days of a sports nutrition category catering solely to elite athletes and bodybuilders. Today everyone, from your neighbor to your grandmother, is looking for a more efficient way to fuel up for fitness, follow dietary and activity guidelines, and maintain a healthier lifestyle.

The trend is prompting both opportunity and challenge for manufacturers looking to capitalize on the needs of the emerging active nutrition consumer.

The mainstreaming of this market is a global phenomenon that has prompted significant growth for the overall category.

Euromonitor International predicts that the global sports nutrition market will jump from nearly

\$9 billion

in 2012, to almost

\$24 billion

by 2022.¹

The trend is most prevalent in developed markets, where knowledge about healthy diet and lifestyles is widespread, with North America seeing the largest sales volume overall. But other markets are expected to see the strongest growth rates in the next few years. Asia Pacific, and especially China, is being driven by favorable government policy and increasing consumer enthusiasm for fitness; Brazil is seeing emerging interest in healthy lifestyles.²

What's in a name?

But who is this newly minted “active nutrition” consumer? It's not easy to unravel. These everyday athletes span both generations and genders, so brands will have to understand what drives specific groups and transition how they communicate with mainstream active consumers.

Generally speaking, some major trends have helped to drive the rise of this fitness-aware consumer segment. The media has certainly played a central role in raising consumer awareness of healthy diets and the importance of regular exercise, in line with dietary and physical activity recommendations. Technological advances, such as fitness tracking devices and social media, have also helped to keep fitness enthusiasts accountable by tracking their progress as well as keeping them up on the latest trending sports and workouts. Overall, these consumers are willing to spend money on gear and products that meet their active lifestyle needs.³

Convenience is another key factor for these casual athletes. They are looking for products that not only taste good, but also have label-friendly ingredients and are in formats that allow easy consumption on-the-go, such as bite-sized bars and snacks.

Beyond that, active nutrition consumers are a divergent group, having interest in a wide variety of activities, ranging from yoga to kayaking. Their knowledge and motivation levels span from the well-informed consumer seeking better health or overall fitness, to those driven by weight management, to seniors wanting to preserve energy and age well.⁴

So for brands, addressing the performance needs of this broad audience presents its challenges – and is certainly different from the core sports nutrition consumer. For example, the caloric and recovery needs of a triathlete or marathoner are significantly different from those of the typical weekend warrior.

Product formulators now have to keep a keen eye on specific demands for niche groups among these fitness enthusiasts. Market research on the category and experts in the field suggest that product development will become more personalized and geared toward this broader range of consumers, and some believe that injury prevention and joint decline, as well as muscle maintenance, will be important product attributes for these consumers.^{5,6} For example, published research shows the impact of nutrition support on muscle use and recovery, which helps to drive interest.^{7,8} These recreational athletes are looking to get moderate exercise and have fun, but they won't necessarily train at a highly intense level.

According to a study conducted by EU-based whey protein company Volac and market research firm Sports Integrated, there are now basically two markets that have different drivers:



**Performance
Nutrition**



**Active
Nutrition**

The active nutrition platform represents a shift from the catch-all sports nutrition category to a broader platform focusing on a consumer who plays sport for social, physical and health benefits and is driven by weight management, as opposed to performance objectives or muscle building.⁹

Sports Integrated founder Nick Morgan explained in a *Nutrition Insight* article that while exercise is the common denominator, consumers are less defined by 'what' they do, and more by 'why' they do it."

Protein and muscle health: An important pairing

For these consumers, the connection between good-quality nutrition and energy to support exercise is undeniable. Nowhere has this link been more meaningful than in the increasing demand for protein-enhanced products. Consumers show an increased understanding of the value of protein for energy, weight management and overall wellness,¹⁰ and active nutrition consumers are no exception. Add to that a recognition of muscle maintenance as part of healthy aging, and protein has become a star player in the evolution of active nutrition products. According to Euromonitor, protein products make up about 80% of global sports nutrition product sales volume, and the category is expected to see healthy growth¹¹ – specifically in the United States, where it is predicted to reach \$1.7 billion by 2022 on a compound annual growth rate of 12%.¹²

That noted, understanding of the relationship between protein and muscle recovery is still relatively vague, although Sports Integrated founder Morgan predicted the category is poised to be strongly repositioned.¹³

Widespread interest among consumers for label-friendly products is also playing a role in product formulation in the active nutrition space, especially in the growing demand for products with plant-based proteins. According to data from Lumina Intelligence, plant-based formulas now represent about 15% of sports/active-positioned products across 20 countries.¹⁴ These plant-based proteins are expected to be game-changing in the category, due to growing concerns about animal welfare, cruelty-free awareness, worry over antibiotic use in poultry and the growing popularity of vegan and vegetarian lifestyles, according to the Lumina study.

The road ahead

All this portends big opportunities for companies across this newly defined market segment, especially for brands that can tailor their messaging to these amateur athletes. Here are a few key trends to anticipate:

Simple and easy wins the race: It's as straightforward as that. Although brands will need to continue to make a strong education effort to explain what products do and how they work, formulas that are understandable and easy to use for casual sports consumers will have continued appeal.

Recovery mode: Addressing those Monday-morning aches and pains will be important for the weekend warriors and casual athletes, and products geared to this market have a strong opportunity. But recovery means different things to different athletes, spanning from overall fatigue and hydration to muscle soreness. Brands have an opportunity to think out-of-the-box and address a wide variety of issues around sports recovery.

Efficacy matters: Consumers want to know if a product is safe and effective. While everyday athletes may not need to see a certification that a product doesn't contain a banned substance, transparency in supply chain and product quality will be increasingly important. They do want them to deliver on specific goals. And if athletes feel immediate results from consuming the product, all the better. These sports consumers may not have a strong understanding of the benefits of certain ingredients – such as complete proteins or branched-chain amino acids – but they will certainly perceive whether they feel more energetic or not.

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