



Taking sports nutrition
products to a new level

As the picture of the typical sports nutrition consumer evolves from a performance-driven bodybuilder to a health-oriented senior (and just about everything in-between), the definition of what makes a successful sports nutrition product is changing as well. And this mainstreaming of the category is not for brands who get winded easily.

Sports nutrition is no longer a segment in which just one generic message will do. Products must now be designed, positioned and marketed with pinpoint accuracy. Brands that want to take their products to the next level must now clearly understand their target customer and communicate what their product does in a way that resonates to them personally.

But for companies that find the right formula, there is a lot of upside. Research firm Euromonitor International says that sports nutrition is the fastest-growing segment in consumer health and reports that the category has seen compound annual growth of 7.9% since 2011, which will continue to 2021.¹

The expansion is all about reaching that broader, mainstream consumer who is focused on overall health, fitness and healthy living. The category has benefitted from global interest in health and wellness, as consumers strive to eat a healthier diet, practice physical activity and take other efforts to increase their lifespans.²



North America is, by far, the largest region for sports nutrition products, with more than triple the sales of the next-largest market, Western Europe.³ And growth is also accelerating in most regional markets, hovering at close to 10% in top markets like North America and Western Europe between 2011 and 2016. This rate is expected to increase to nearly 18% for those markets between 2016 and 2021.⁴

So who are these consumers and what do they want?

Today's sports nutrition consumer is expanding beyond traditional workouts and training to practice a variety of different activities, from jogging and hiking to yoga or even e-sports (requiring a sharp mental focus). So their needs from sports nutrition products are equally diverse.

Euromonitor analyst Carolina Ordonez developed a framework to categorize these consumers. It includes the traditional Core Users, athletes and bodybuilders who have been long-time sports nutrition consumers; Casual Users, or recreational athletes and enthusiasts; and the new Lifestyle Users, health-conscious consumers who see fitness and nutrition as fundamental to a healthy lifestyle. This attitude transcends generations, taking hold among the young (Generation Z and millennials), who are seeking convenient and healthy energy for their on-the-go lifestyle, as well as the not-so-young (baby boomers), with this latter group more typically seeking products that support their need for energy and muscle maintenance as they age.⁵

When addressing these active lifestyle consumers, it is best to use language and images that showcase their broader lifestyle activities and portray athletes in different lifestyles, rather than discussing elite performance goals and showing images of bodybuilding or elite athletes.⁶

As this expanding active lifestyle consumer opts in, product formats are now going well beyond the sports nutrition standards of bars, gels, chews and powders to address broader needs for function and convenience, with ready-to-drink functional beverages, fortified cookies and cakes, and single-serving stick packs. Although the tried-and-true formats may still work great for some, active lifestyle consumers may prefer the familiarity of a cake or cookie, or may like different formats for variable eating occasions. What works for lunch may not be good when at the gym or on-the-go.

Following are some product development trends that will continue to push sports nutrition to a new level:

Protein powders are still big, but they are now plant-based

Adding protein to sports nutrition products has had a long history, with a majority of sports nutrition products touting protein's benefits because of its well-known association with a healthful diet, as well as muscle maintenance and strength. The demand for protein is not changing, but as the category expands beyond its core users, lifestyle athletes look for attributes beyond just performance and health to wider issues, such as preferences for products that adhere to a vegan or flexitarian standard,* and concerns about a product's sustainability or whether its manufacturer has animal welfare policies.

Emerging plant-based protein ingredients made with pea, rice and hemp protein, for example, bring some new advantages to the table. They are not major food allergens like other protein sources from dairy and soy, they meet flexitarian and vegan requirements, with many ingredients touting organic and non-GMO** certification. These ingredients are also easy to work with in product formulas, providing a “clean” flavor which is helping to improve the taste of traditional sports nutrition products like protein powders.

Label-friendly, science-based sports products

With performance a top priority, sports nutrition products have often featured a long list of complicated ingredients. But as mainstream consumers continue to be more savvy about ingredients in the products they buy and where they come from, it is likely that product formulators will strive to use fewer and more-familiar ingredients in sports nutrition products – following the increasing demand for “clean label” in other product categories. Keeping the ingredient list short and sweet will make it easier to communicate the benefits of a product to mainstream, active lifestyle consumers.⁷

That noted, consumers still want to see products that are well-substantiated by evidence. So, being transparent and able to demonstrate the substance behind these products will also become increasingly important. Euromonitor predicts that consumers in leading markets will subject their sports nutrition products to greater scrutiny and want to see certifications that verify quality standards, as well as fewer and more familiar ingredients.⁸



Convenience 2.0

Sports-oriented products have always aimed to provide easy, on-the-go energy, but brands will likely take this to new heights as competition in the space heats up. Ready-to-drink beverages may steal some thunder even from conveniently packaged single-dose powders, which have been a traditional favorite in the category. At the same time, as Americans now turn to snacks for an increasing percentage of their daily eating occasions, experts in the field predict nutritive snack innovations will become a next area of innovation as formulators add improved nutrition and function to snacks and even desserts.⁹

Make it personal

Product personalization is coming across many food and beverage categories, and sports nutrition will be no exception. Brands have already begun to tap into active lifestyle consumers via the online crowd cultures in which they identify... and it won't be long before they can merge the data they collect to create more personalized products. Companies are already creating sports performance products that consider individual goals and are supported by macronutrients, specific hydration needs based on a person's perspiration rate, or nutrient blends that offer athletes – including e-gamers – a mental boost or focus to get them in the right frame of mind prior to a workout.

While many of these ideas are still in the formative stages, sports nutrition as a category will continue to break ground and drive disruption that will overflow into overall food and beverage innovation. But that is how the segment continues to win the race in growth for consumer health products.

SOURCES:

¹ Euromonitor International. "Trends and Drivers of the Sports Nutrition Industry."

https://go.euromonitor.com/white-paper-consumer-health-2018-sports-nutrition.html?utm_source=blog&utm_medium=blog#download-link

² Ibid.

³ Ibid.

⁴ Ibid.

⁵ Ordonez, C. "Sports Nutrition: Healthy Living and Fitness Trends Provide Great Prospects." Nutraceuticals World. Nov. 3, 2017.

<https://www.nutraceuticalsworld.com/blog/blogs-and-guest-articles/2017-11-03/sports-nutrition-healthy-living-fitness-trends-provide-great-prospects/15070>

⁶ Watson Blog. Sports Nutrition Trends 2019. What Consumers Want. June 27, 2019.

<https://blog.watson-inc.com/marketing/sports-nutrition-trends-2019-what-consumers-want>

⁷ Ibid.

⁸ Ibid, Euromonitor International.

* The USA FDA has not defined vegetarian or vegan.

** There is no single definition of "non-GMO" in the USA. Contact Cargill for source and processing information.

Claims: The labeling, substantiation and decision making of all claims for your products is your responsibility. We recommend you consult regulatory and legal advisors familiar with all applicable laws, rules and regulations prior to making labeling and claims decisions.