



Sports Drinks Take Aim at Female Consumers

Once the sole purview of bodybuilders and hard-core, predominately male athletes, sports nutrition products have muscled their way into the mainstream.

Driven by a new class of consumers interested in adopting healthy lifestyles, the sports nutrition space has been tagged as the fastest-growing segment in consumer health by Euromonitor International, with a 7.9 percent CAGR forecast from 2016 to 2021.¹

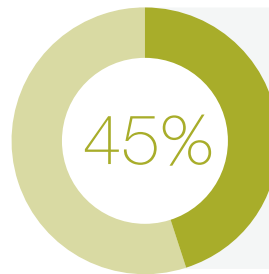
Women are a big part of that growth. But according to research from Lumina Intelligence, many of the sports nutrition products aimed at the female market simply aren't resonating. As Thomas Morgan, a market analyst for the firm explains, "They get less engagement overall, they get lower scores and the majority of products aren't really connecting with their target audience."²

So what's missing in the current offerings? Euromonitor's Carolina Ordonez says understanding what millennial women want is the key. "This female consumer is very educated and looks for sports nutrition products that represent her values: transparency, organic, non-GMO,* plant-based, few [and] natural ingredients, local sources, vegan or vegetarian, and so on," she explains.³

Cargill's Alyssa Leyva, a veteran of the beverage business, concurs, noting that many of the attributes that appeal to sports-minded women are the same trends driving sales in the larger food and beverage space: plant-based proteins, sugar reduction and label-friendly ingredients. Just as those mega-trends have transformed the rest of the food and beverage industry, Leyva believes they can also drive innovation in the sports beverage space as marketers set their sights on active women.



First, developers need to look beyond the muscle powders that once dominated the broader sports nutrition market. "Powders will always have their place," Leyva acknowledges, noting that Innova Market Insights found that traditional protein drink mixes accounted for 45 percent of global new sports nutrition products in 2018.⁴ However, she sees opportunities for a new generation of female-focused, protein-fortified juice drinks, sports gels, and even protein waters and coffees.



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"For time-strapped millennial women, convenience matters," Leyva says. "These ready-to-drink beverages offer mobility and fit on-the-go lifestyles." Still, format aside, to appeal to the female sports enthusiast, developers are advised to follow a few guiding principles:

1 Taste wins the day. "While early sports nutrition powders could sacrifice taste in the name of ultra-high protein levels, today's more mainstream female consumer won't tolerate off flavors or aftertastes," Leyva says. Just don't overdo the sugar.

Mintel research suggests that nearly half (46%) of consumers who use sports nutrition products avoid products that are high in sugar.⁵ That tracks with trends across food and beverage categories and speaks to the broadening appeal of the sports nutrition category. "Sugar content is on everyone's radar," says Leyva, "but fortunately, label-friendly, zero-calorie sweetener solutions like stevia can deliver the sweet without the sugar."

2. Protein packs a punch. Protein remains a huge draw in the sports beverage space. According to Melissa Machen, who specializes in protein formulation for Cargill, that's because consumers associate protein with a raft of positives. "Muscle-building, weight management, satiety, recovery speed – women associate protein with all these benefits," she explains. Certainly, soy and whey proteins remain widely popular in formulations, but alternative plant-based proteins are also gaining ground. "Plant proteins tend to hold special appeal with women concerned about sustainability and animal welfare," Machen explains, noting that plant-based proteins offer consumers a way to combine their ethical and environmental concerns with their food and beverage choices.

3. Clean labels stand out. Mintel research suggests that 64 percent of consumers who use sports nutrition products always read the ingredient list before buying a new product.⁶ "More often than not, the tendency to check product labels is driven by a desire to avoid an ingredient rather than to seek one out," Levya says, pointing to Cargill's proprietary research. In the company's survey, artificial sweeteners, GMOs and ingredients that sound like a chemical were among the most avoided ingredients across food and beverage segments.⁷ She suggests product developers keep this in mind as they create beverages for women pursuing an active lifestyle.

4. Remember the earth. Survey after survey finds that consumers – especially millennials – take sustainability concerns to heart. It's a reality that prompted market research firm Nielsen to declare the upcoming decade that of the "sustainable shopper."⁸ According to the market research firm, nearly three in four consumers now say they would definitely or probably change their consumption habits to reduce their environmental impact.⁹ The Hartman Group's research adds further evidence, noting that environmental and social concerns are more important purchasing considerations for millennials, parents and women.¹⁰

For product developers, these concerns about sustainability can add another layer of complexity to formulations. "Women view plant-sourced ingredients as better for the environment, but formulators may be more accustomed to working with dairy proteins in beverages," Machen says. Nevertheless, product developers shouldn't let a lack of experience hold them back. Machen says she's had consistent success using plant-sourced proteins in low- and mid-level protein drinks, but admits that ultra-high protein levels (30 grams or more) can be harder to achieve with plant proteins alone.



Choosing ingredients that fuel sales

Cargill's broad ingredient portfolio can help product developers navigate the do's and don'ts of women's sports beverages, never losing focus on the importance of taste and mouthfeel in the final product.

- **Stevia sweeteners** are now a leading option to add sweetness to products while maintaining a healthy, label-friendly, active nutrition profile. In 2018, sports nutrition products accounted for 21 percent of all new product launches with stevia.¹¹ Several factors have contributed to stevia's rise, including the dramatic improvement in sweetness quality seen in options like Cargill's **ViaTech® stevia leaf extract** and **EverSweet™ stevia**. While ViaTech is designed for sugar reductions of up to 70 percent, EverSweet, which is made via fermentation, enables up to 100 percent sugar replacement.
- **Zerose® erythritol**, a compound naturally present in fruits and vegetables, and commercially available via fermentation, is another popular sweetener option. It is often used in combination with stevia, as the zero-calorie bulk sweetener can help round out the flavor profile of high-intensity sweeteners. In addition, erythritol helps enhance the body and mouthfeel of reduced-sugar beverages.
- **PURIS® pea protein**. While not considered a complete protein, formulators can easily blend pea protein with a complementary protein source, or add extra pea protein, to make on-pack protein content claims. Beyond its nutritional benefits, PURIS pea protein appeals to consumer desires for great taste, simple labels and plant-based ingredients.
- High-protein drinks may be the hallmark of the sports nutrition category, but hydrocolloids like **pectin** are critical to their successful formulation. Proteins must be protected and held in suspension, especially in low-pH dairy beverages like drinkable yogurts and milk-juice blends. Pectin helps stabilize the proteins, preventing them from breaking down. The label-friendly ingredient also plays a pivotal role in reduced-sugar beverages, replacing the body, texture and mouthfeel of sugar.

REACHING THE FEMALE ATHLETE

Women represent a largely untapped market in the sports beverage space. Rather than attempting to attract sales with pinked-up versions of male-oriented offerings, product developers would be well served to tap into key trends that align with millennial women's desires for reduced-sugar sports beverages offering clear nutritional benefits. Labels matter to this demographic, so products made from familiar, sustainable, plant-based ingredients can provide a compelling story. Above all, formulators must remember that as the category extends beyond elite athletes to appeal to a more mainstream audience (male and female alike), expectations for taste, mouthfeel and label appeal also increase.

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

PURIS™ Pea Protein is a trademark of PURIS Foods, a Cargill strategic partner.

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