

ActiveIntel™ Attitude & Usage Study

Taking Active Nutrition
beyond “one size fits all”



Cargill
®

Over the past few years, the sports and active nutrition (SN) market has exploded in growth, and the line between sports nutrition and active nutrition is blurring rapidly. Once the arena of hardcore bodybuilders and elite athletes, the category has widened its appeal to include everything from young fitness enthusiasts to mature (and surprisingly competitive) pickleball players.

“The active nutrition landscape is more diverse than ever,” said Bret Barhoover, Cargill Marketing Director for Specialized Nutrition. “Consumers have vastly different needs depending on their fitness routines, health goals and lifestyles.” According to research from *Nutrition Business Journal*, 64% of sports nutrition users said they purchase the products to improve their general health, compared to the 39% who do so for sports performance or active lifestyle goals.¹

This growing audience presents a rich opportunity for fresh ideas and targeted solutions. Valued at \$45.24 billion USD in 2023, the global sports and active nutrition market is expected to expand at a robust compound annual growth rate (CAGR) of 7.5% from 2024 to 2030.²

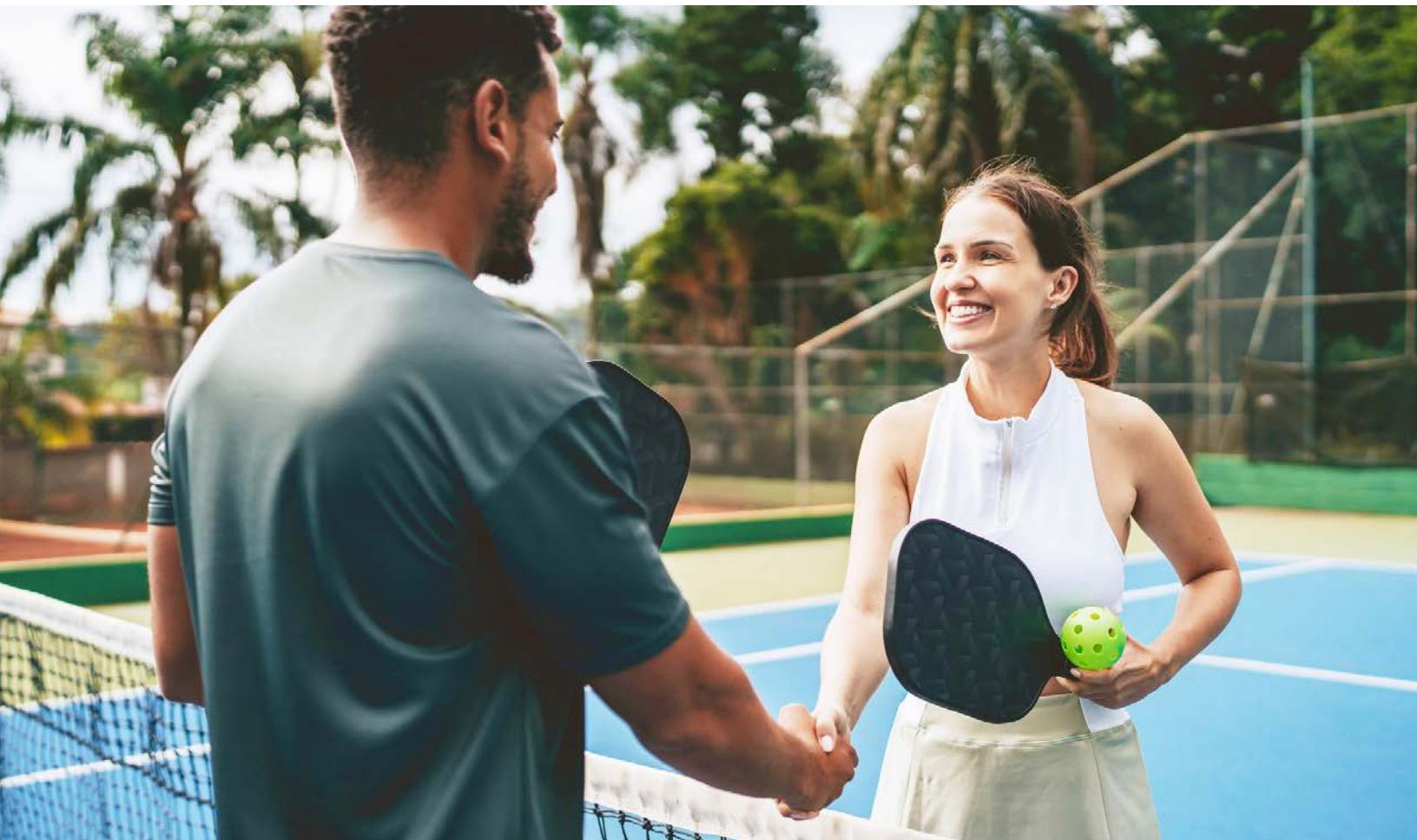
To help bring today’s active nutrition consumer into focus, Cargill recently conducted a study of over 1,500 adult users of one or more sport/active categories. The study was designed to delve into the attitudes and usage habits of purchasers of active nutrition products. Observed Barhoover, “Our research underscores the importance of understanding these segments to develop products that truly resonate with today’s active consumers.”

64%

of sports nutrition users said they purchase the products to **improve their general health**, compared to the

39%

who do so for **sports performance or active lifestyle goals**.



Distinct user segments emerge

A key finding from the study was the identification of unique active nutrition user profiles, characterized by distinct attitudes, fitness routines, body images and opinions about staying healthy. Differences emerged around the needs they turned to active nutrition products to address, functional benefits sought, preferred formats and consumption frequency. Understanding these nuances is critical to developing product solutions that address consumer needs and expectations in the active nutrition space.

Dialing into habits, needs and priorities

ATTITUDINAL SEGMENTS

Insights from consumer responses led the team to identify these five attitudinal segments within active nutrition:



Perfection Pursuers

Highly disciplined and performance-driven



Active Achievers

Consider fitness a lifestyle choice



Routine Realists

Value balance and simplicity in workout routines



Moderate Movers

Focused on staying active and eating well to maintain their lifestyle



Determined Dabblers

Casual users without a rigid diet or fitness routine

These consumer segments were distinguished by exercise frequency and type, as well as their diet / nutritional habits.

CRITICAL NEED STATES

The research also uncovered seven critical need states these users rely on the category to address.



Optimal Performance



Muscle & Maintenance



Mindful Favorite



Beneficial Boost



Smart Bite



Healthy Start



Stifle Hunger

These need states are not mutually exclusive to a particular user segment; rather, their relative importance can vary from one segment to the next.

Get to know the active nutrition user segments

Understanding the prevailing attitudes, habits and priorities for each active nutrition user segment will equip brands with valuable insight and tools to optimize product strategy and develop solutions that align more closely with user needs — both conscious and subconscious. Our researchers developed the following personas to capture key distinctions between the segments.

SEGMENT SNAPSHOT:

Perfection Pursuers

"I'm Matt. My body is a temple, and I'm dedicated to nurturing it through rigorous exercise and a disciplined diet. Being younger and always plugged into social media, I constantly feel there's room for improvement. Every decision I make is in pursuit of personal bests in fitness and wellness."



Demographic Leanings



Employed full-time



Millennial



Gen Z

Key Need States



Muscle & Maintenance



Optimal Performance



Mindful Favorite

Exercise Focus

Frequency: HIGH | Duration: LONG



Crossfit



Sports



Running



Biking



Lifting

Category Usage

VERY STRONG



Bars

AVERAGE



Beverages

HIGH



Powders

HIGH

Defining Attitudes

I follow fitness pros / athletes on social media

87%

Bodybuilding / weight training is part of who I am

80%

I follow a strict training & exercise regimen

79%

I frequently travel for fitness-related competitions

71%

Share of Total Users:

23%

SEGMENT SNAPSHOT:

Active Achievers

*"I'm Olivia. I believe you only get one body, so **it's crucial to stay fit to care for both physical health and mental well-being**. I'm deeply committed to maintaining an active lifestyle, including a mix of activities, ambitious goals and support from coaches and tools. I focus on eating clean, steering clear of sugar and following a personalized diet plan to optimize my health."*



Demographic Leanings



Employed full-time



HH income \$100k



Multi-racial

Key Need States



Muscle & Maintenance



Beneficial Boost

Exercise Focus

Frequency: VERY HIGH | Duration: VERY LONG



Resistance Training



Interval Training



Pilates



Endurance Training



Balance Training

Category Usage

VERY STRONG



Bars

AVERAGE



Beverages

AVERAGE



Powders

HIGH

Defining Attitudes

I work out regularly

96%

Fitness is a high priority in my life

93%

I balance physical training & mental wellness

92%

I'm an expert on being fit & healthy

71%

18%

Share of Total Users:

Understanding these nuances is critical to developing product solutions that address consumer needs and expectations in the active nutrition space.

SEGMENT SNAPSHOT:

Routine Realists

"I'm Evan. Life is meant to be enjoyed, and I've found a balance that works without overcomplicating things. I set realistic fitness goals that work with my schedule, not tied to the latest trends or pressure to track constantly. My diet is less strict, and I enjoy indulging in treats. After all, working out allows me that flexibility!"



Demographic Leanings



Single
(never married)



Gen Z



Hispanic

Key Need States



Muscle &
Maintenance



Optimal
Performance



Mindful
Favorite

Exercise Focus

Frequency: MODERATE | Duration: MODERATE



Lifting



Resistance
Training



Endurance
Training



Interval
Training



Running

Defining Attitudes

I like simple & straightforward
workout plans

61%

Being active is an important part
of my lifestyle

60%

I set realistic fitness goals
that work with my schedule

58%

Category Usage

MODERATE



Bars

AVERAGE



Beverages

AVERAGE



Powders

AVERAGE

Share of Total Users:

20%



SEGMENT SNAPSHOT:

Moderate Movers

"I'm Vanessa. Taking care of myself, both physically and mentally, is important, but I don't feel the need to pursue perfection. I know it's important to keep moving, and I enjoy activities that are both easy on my body and bring me peace of mind. When it comes to eating, I strive for balance. I try to eat healthier with smaller portions and avoid sugars and carbs, but I'm not stringent about it."



Demographic Leanings



No kids in household



Household income
\$100k+



Boomers+

Key Need States



Stifle Hunger



Smart Bite



Healthy Start

Exercise Focus

Frequency: MODERATE | Duration: SHORT



Hiking



Walking



Swimming



Yoga



Biking

Category Usage

LIGHT



Bars



Beverages



Powders

AVERAGE

Defining Attitudes

I like simple & straightforward workout plans

86%

I prioritize my health & well-being

82%

I value the convenience of a quick, healthy snack / meal on the go

81%

I know I should exercise more than I do

75%

Share of Total Users:

23%



SEGMENT SNAPSHOT:

Determined Dabbler

*"I'm Laurie. I recognize that staying healthy is important, but it's not my top priority right now. I make time for easygoing activities when it's convenient. **Enjoying my food is more important than sticking to a diet.** I try to incorporate healthy options and eat smaller portions, but I don't chase after the latest trends or pay more for foods that claim to be healthier."*



Demographic Leanings



White



Women



Boomers+

Key Need States



Stifle Hunger



Smart Bite



Healthy Start

Exercise Focus

Frequency: VERY LOW | **Duration:** VERY SHORT



Walking



Nothing

Defining Attitudes

I know I should exercise more than I do

90%

It's difficult for me to stay motivated to exercise regularly

77%

I value the convenience of a quick, healthy snack / meal on the go

73%

Category Usage

VERY LIGHT



Bars



Beverages



Powders

AVERAGE

Share of Total Users:

16%



Need states driving category usage

Digging into consumer habits and motivations for selecting a particular active nutrition product on a specific occasion revealed 7 key need states that active nutrition products were used to satisfy. As you can see from the user snapshots in the previous section, a particular user segment may experience many (if not all) of these needs; however, the relative importance of a specific need will vary based on individual priorities.

						
Optimal Performance <i>Rely on products to optimize performance</i>	Muscle & Maintenance <i>Use to support muscle maintenance & recovery</i>	Mindful Favorite <i>Turn to trusted brands to balance nutrition & taste</i>	Beneficial Boost <i>Consider these products a feel-good pick-me-up</i>	Smart Bite <i>Use as better-for-you snacks to curb cravings</i>	Healthy Start <i>Provide energy & nutrients to jump-start the day</i>	Stifle Hunger <i>Seen as a convenient way to satisfy hunger</i>
37% Optimize a workout 26% Perform better at workout or sports 26% Support muscle-building / recovery 22% Feel nourished	52% Meet daily protein requirement 47% Support muscle-building / recovery 37% Replenish after workout 18%: Optimize a workout	39% Reliable favorite 33% Affordable 26% Meet daily protein requirement 23% Provide energy boost / pick-me-up	41% Provide energy boost / pick-me-up 40% Provide sustained energy 39% Feel nourished 27% Healthy alternative to snacking	55% Healthy choice 45% Light / not overly filling 25% Healthy alternative to snacking 21% Fit dietary lifestyle	43% Replace a meal 43%: Doesn't take any time to prepare 39% Could eat easily on-the-go 33% Satisfy hunger	53% Satisfy hunger 43% Tide me over until next meal 36% Doesn't take any time to prepare 36% Could eat easily on-the-go

← HIGHEST CATEGORY CONSUMPTION →
HIGHEST
CATEGORY CONSUMPTION **LOWEST**
CATEGORY CONSUMPTION

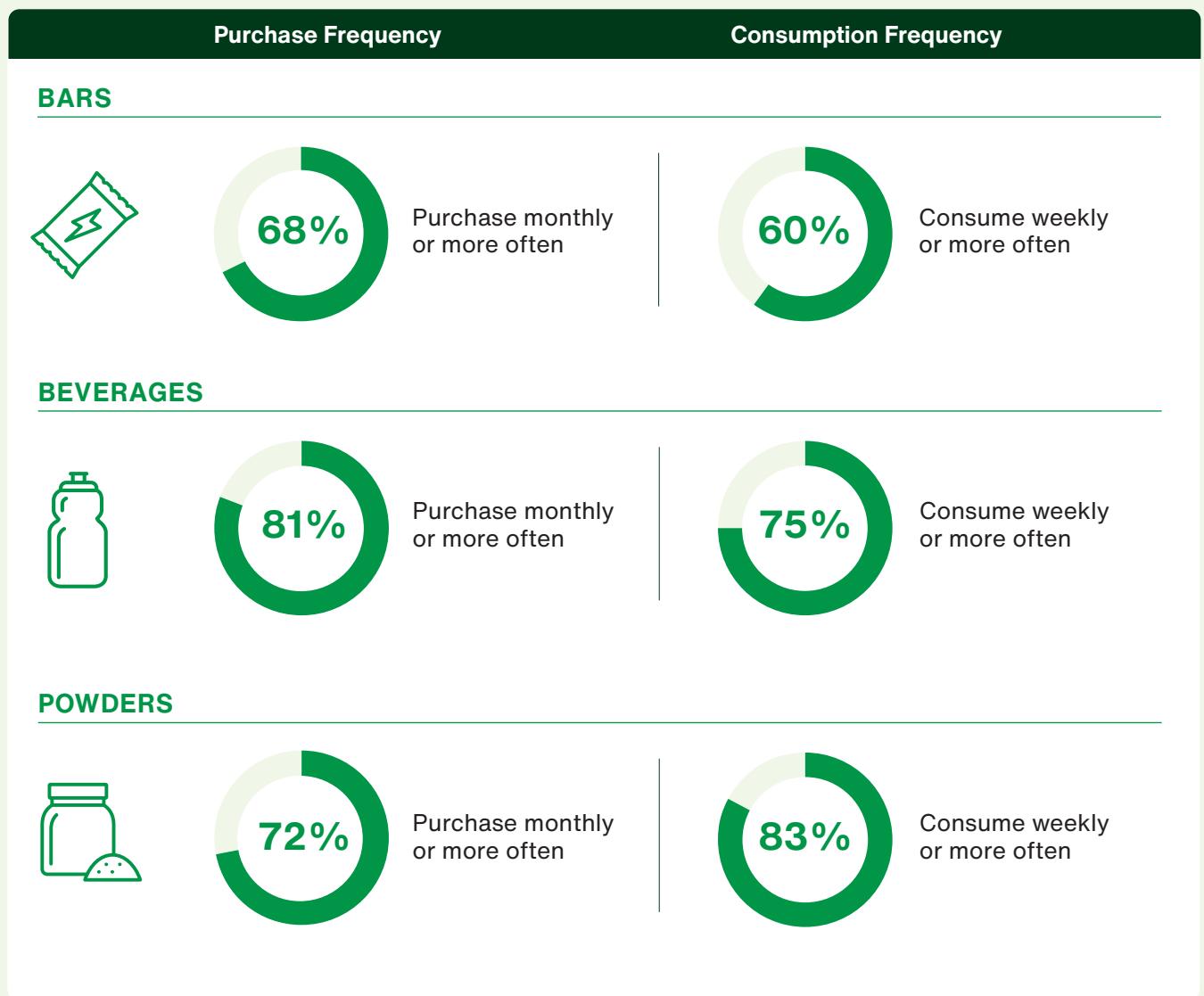
Not surprisingly, these need states also correlate with category usage frequency – with the highest consumption associated with specific, purpose-driven needs (optimizing performance, muscle-building and recovery), and lower usage/engagement when active nutrition products are used to serve a more-basic need like hunger.

Analyzing preferences by product format

Another aspect of the study delved into three of the most popular delivery formats for active nutrition products: bars, beverages and powders. It examined user purchasing behaviors, consumption habits, brand preferences and typical user profiles for each sub-category.

Purchasing and consumption habits

Users of active nutrition bars, beverages and powders demonstrated a high level of product engagement, with an overwhelming majority saying they purchase these products in-person on an at-least-monthly basis – and consume them weekly, if not more often. Interestingly, among the participants, the usage breakdown was roughly equal among bars, beverages and powders (n=524 / 512 / 522 respectively).



Unwrapping the protein nutrition bar consumer

Compact and portable, active nutrition bars often serve as a go-to for satisfying hunger in a healthy way.



Typical User Profile



Value **healthy & convenient** foods

Prioritize bars that **provide energy** & are **high in protein, fibers & vitamins / minerals**

~ 1/3 don't follow any diet, though **some stick to low-sugar** foods or their own **personal eating plan**

Consumption Habits



74% mid-morning or afternoon snack

24% use around workout / exercise (typically before or after)

~ **1/3** also consume nutrition beverages or powders weekly

Activity Level



Moderate exercisers:

Several days a week, often for 30-60 min.

Walking is the most common physical activity; some also run, weightlift or hike

Top Needs Met by Bars



87%: Didn't take any time to prepare

84%: Easily eaten on-the-go

83%: Satisfied hunger

81%: Healthy choice

63%: Affordable



KEY TAKEAWAYS:

Consumers choose bars that keep them full longer, are a nutritious choice and are affordable.



Breaking down the nutrition beverage consumer

Convenient and satiating, ready-to-drink (RTD) beverages are an important part of users' weekday routines, often serving as a meal replacement they can feel good about.



Typical User Profile



Value **nutritious & convenient** foods

Gravitate towards products that are high in **protein & vitamins / minerals** & provide **energy**

~ 1/4 don't follow any diet; **some stick to low-sugar foods or high-protein diets**

Consumption Habits



65% consume in morning / mid-morning

36% drink before, during or after a workout

77% also consume protein / nutrition bars at least 1x/week

Activity Level



Moderate exercisers:

Several days a week, often for 30-60 min.

Walking is the most common physical activity; some also weightlift or run

Top Needs Met by Beverages



88%: Healthy choice

86%: Didn't take any time to prepare

86%: Helped me feel nourished

83%: Healthy alternative to snacking

82%: Satisfied hunger



KEY TAKEAWAYS:

Consumers look to these beverages to provide an instant pick-me-up, while providing a healthy choice that makes them feel nourished.



Pinpointing the powdered beverage user

Protein-packed powders are a daily staple for highly active users, who consider them reliable, multi-purpose nutrition for snacks, meal replacement and workout fuel.



Typical User Profile



Prioritize caring for their health by exercising & eating well

Demographics skew toward **Gen Z, millennials**

Gravitate towards products that are high in **protein & vitamins / minerals** & provide **energy**

More likely to follow a diet: only ~1/5 do not

Consumption Habits



62% consume in morning / mid-morning

56% align usage with a workout

85% also consume protein / nutrition bars at least 1x/week

Activity Level



Frequent exercisers:

Daily / almost daily for 30-60 min.;
1/3 for 60+ min.

Variety of activities:

Walking, weightlifting, running, hiking, training

Top Needs Met by Powders



84%: Healthy choice

83%: Fit my diet / lifestyle

79%: Meets daily protein requirement

79%: Reliable favorite

78%: Supports muscle building / recovery



KEY TAKEAWAYS:

Powder consumers are strong discerners of better-for-you products. They pick products that help them meet their daily protein requirements, while delivering sustained energy in a convenient and portable format.



Finding the whitespace in active nutrition

In addition to identifying distinct active nutrition consumer segments, need states and purchase drivers, the study utilized analytics to reveal latent motivations for these three product categories. Latent drivers are factors that correlate with product satisfaction, but are not expressly stated, revealing what is subconsciously important to consumers – and thus, opportunities for innovation and differentiation.



Building a better bar

Protein/nutrition bar consumers seek out bars with nutritious ingredients and great-tasting flavors.

Their selections are driven by habit and a need for the right amount of affordable, healthy indulgence.

Table stakes. Brands should highlight protein, fiber and vitamin/mineral content, while communicating how efficiently bars can keep active consumers full longer.

Opportunity spaces. To stand out in a crowded field, brands can differentiate by incorporating functional ingredients like Omega-3's or postbiotics and highlighting sustainable sourcing. Whitespace also exists for bars that deliver on low carbohydrate content, while supporting immune and gut health.

Pouring more into beverages

Users of active nutrition beverages want products that conveniently deliver an important pick-me-up and lasting nourishment. They place trust in reliable favorites, gravitating toward products that are high in protein, vitamins and minerals, while providing a source of energy.

Table stakes. Deliver reliably on protein and vitamin / mineral content that helps provide sources of energy.

Position beverages as convenient, better-for-you snacks or meal replacements that tide them over until the next meal.

Opportunity spaces. Explore formulation around low carbs, high protein, hydration and indulgent flavors. Products tailored to women's health offer an emerging market.

Creating more powerful powders

Powdered beverage consumers prioritize convenience, protein content and a source of sustained energy. Packaging should spotlight the protein and vitamin/mineral content in powders for everyday occasions.

Table stakes. In addition to delivering on nutritional goals, powders' consumption frequency demands that powders be low-calorie and affordable.

Opportunity spaces. While most powders are consumed at home, innovation to make them more portable could expand usage occasions. Growing interest in brain health also presents an untapped opportunity.

Bringing it all together

For brands in the active nutrition space, Cargill offers a powerful blend of nature-based, science-backed solutions to accelerate your competitive advantage.



Data-driven insights,
including proprietary
research initiatives
like our Active
Nutrition report



**Industry-leading
ingredient portfolio**
offers a single-
source solution



**Deep R&D
expertise**
with ingredient &
category experts to
guide innovation



**Reliable
global supply**
protects your
cost-in-use

Learn more at
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na/specialized-nutrition/
active-nutrition](https://cargill.com/food-beverage-na/specialized-nutrition/active-nutrition)
or contact your
Cargill representative.



SOURCES:

¹ SupplySide Journal. "Active Nutrition is the New Sports Nutrition." July 2023.

² Grand View Research. "Sports Nutrition Market Size, Share & Trends Analysis Report by Product Type, by Formulation, by Consumer Group, by Sales Channel, by Region and Segment Forecasts, 2024-2030."

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prior to making labeling and claims decisions.*