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"Sales of nutrition and performance drinks held steady in 2017. Consumer interest in health and in products that provide functional benefits spelled gains in recent years. A relatively positive economic climate has allowed consumers to spend more on drinks that promise added value."

- Beth Bloom, Associate Director - Food & Drink

This report looks at the following areas:

- Dollar sales of nutrition and performance drinks slow
- Many consumers think products in the category are too high in sugar
- Few consumers think products in the category deliver on promised claims

A slowdown is seen in 2017 due to competing categories getting into the functional space, sometimes with cleaner formulations, inherent function, and lower sugar totals. Nutrition and performance drinks will need to stake their claim as effective providers of functionality and develop cleaner formulations to appeal to consumers' pursuit of healthy eating.

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Market Perspective

Competing categories successfully make a play for functionality

Market Factors

Three quarters of adults are currently managing their weight Figure 13: Weight management status, July 2017

84% of consumers are limiting the amount of sugar in their diet

Legislation grows less sweet on sugar

Diet health may be a stronger focus than exercise

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Aging population may create need for functional nutrition

Figure 15: Share of population by age, 2013-23

Key Players – What You Need to Know

Top four leaders experience losses while other brands gain

Premier Protein drives gains of nutritional drinks

Nutritional drinks could stand to boost functional claims

Growth in non-dairy protein

Sweetener usage varies by segment

Company and Brand Sales of Nutrition and Performance Drinks

Top four leaders experience losses while other brands gain

Sales of nutrition and performance drinks by company

Figure 16: Multi-outlet sales of nutrition and performance drinks, by leading companies, rolling 52 weeks 2016 and 2017

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Premier Protein drives gains of nutritional drinks

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Nutritional drinks could stand to boost functional claims

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Growth in non-dairy protein in nutritional/weight loss segments

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Sports drink leaders see declines

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Turmeric offers path toward inherent health

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Sports drinks lead consumption

31% of nutrition/performance drink consumers have increased consumption

While drink types have clear functional association, blurring can be seen

Concern over sugar totals challenges category

Only 15% of consumers think products in the category deliver on promised claims

A quarter of consumers think protein derived from plants is as effective as that from dairy/meat sources

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Sports drinks lead consumption

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A higher percentage of category participants drink RTD varieties

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While drink types have clear functional association, blurring can be seen

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Performance drinks are turned to for multiple outcomes

Weight loss drinks users look for more than just weight loss

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