

Attitudes towards Sports Nutrition - UK - August 2019

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“The sports nutrition market is going through a major transformation, muscling its way out of its athlete-focused niche into the mainstream. A more accessible and widely resonating ‘active lifestyle’ positioning, together with product innovation and wider availability through mainstream channels, has been at the heart of this shift.”

– **Heidi Lanschützer, Food and Drink Analyst**

This report looks at the following areas:

There are opportunities for sports nutrition to further embrace this through collaborations with mainstream brands given the high level of interest in this concept.

- **The market’s move from niche to mainstream brings along huge growth potential**
- **Personalised solutions have the potential to foster long-term usage and loyalty**
- **Huge opportunity for sports nutrition brands to support healthy ageing among today’s seniors**

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DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market

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The market's move from niche to mainstream brings along huge growth potential

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Personalised solutions have the potential to foster long-term usage and loyalty

The facts

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Huge opportunity for sports nutrition brands to support healthy ageing among today's seniors

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The Market – What You Need to Know

Growth through mainstream channels slows down

Sports nutrition faces mounting competition from high-protein brands

Exercise participation overall is stable, but frequency edges up

Ageing population poses challenge

High-protein diets remain popular

War on sugar continues

Plant-based nutrition is gaining momentum

Market Size

Growth of sports nutrition products through mainstream channels slows down

Figure 9: Value sales in the UK sports nutrition food and drink market[^], 2016/17-2018/19

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The market has muscled its way out of its niche into mass market

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Exercise participation overall is stable, but frequency edges up

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Women muscle in on weights and strength training

Sports nutrition is moving mainstream

Plant-based nutrition is gaining momentum

War on sugar continues

Creating strong demand for lower-sugar options in sports nutrition

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High-protein diets remain popular
 Mounting competition for sports nutrition products from high-protein food and drink
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Acquisition activity remains high
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 Snacking formats are a focus in sports nutrition NPD
 Plant-based innovation surges
 Gut health innovation gains momentum

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The Consumer – What You Need to Know

Young men remain core users but uptake among women on the rise

Usage of high-protein products also edges up

Convenience channel plays important role for sports nutrition

Personalised sports nutrition is a largely untapped opportunity

Scope for collaborations between sports nutrition and mainstream brands

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- More clarity needed on industry regulation, and players should be more vocal about their quality controls
- Scope to switch the focus away from sweet flavours
- Opportunities for a "pro-ageing" proposition to tap the grey pound
- Protein's feelgood factor should be key theme in brand communication

Usage of Sports Nutrition and High-protein Products

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- Over half of users use sports nutrition products at least twice a week
Figure 34: Frequency of usage of sports nutrition products, by gender, April 2019
- Usage of high-protein products also edges up
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- Supermarkets have a strong lead in purchasing of sports nutrition products
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- Specialist stores mostly attract heavy users
- A quarter of under-35 buyers purchase from online-only sports nutrition retailers
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- Scope for collaborations between sports nutrition and mainstream brands
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- Strong interest in personalised sports nutrition
- Personalised products are rare
- More clarity needed on industry regulation
- Brands and retailers should be vocal about their quality controls

Attitudes towards Sports Nutrition Products

- Plant-based proteins enjoy health halo among majority of users
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- Scope to switch the focus away from sweet flavours
- Opportunities for a "pro-ageing" proposition

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Few over-55s use sports nutrition

"Pro-ageing" approach is key to reaching seniors

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Protein's feelgood factor should be key theme in brand communication

Scope to tap into the growing demand for 'mood foods'

Gut health warrants attention

Satiety is the leading benefit for women

Bone health message could boost protein's appeal among older people

Appendix – Data Sources, Abbreviations and Supporting Information

Abbreviation

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