

Sports and Performance Drinks - US - March 2020

Report Price: £3254.83 | \$4395.00 | €3662.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



"The nearly \$9.5 billion market is expected to grow modestly over the next five years, reaching more than \$11 billion by 2024. Performance-centric claims and informative messaging can help set brands apart."

- Madelyn Franz, Research Analyst

This report looks at the following areas:

- Performance drinks pack a lot of power into a small package
- Peak performance for all

However, competition from other functional food and drink options (eg water, BFY snack bars) will challenge the market as wellness-minded consumers focus their attention on finding the best products to help them achieve their goals. Unique ingredients and niche targeting will continue to set sports and performance drinks apart from the rest of the BFY pack.

**BUY THIS
REPORT NOW**

VISIT:
store.mintel.com

CALL:
EMEA
+44 (0) 20 7606 4533

Brazil
0800 095 9094

Americas
+1 (312) 943 5250

China
+86 (21) 6032 7300

APAC
+61 (0) 2 8284 8100

EMAIL:
reports@mintel.com

DID YOU KNOW?

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

Sports and Performance Drinks - US - March 2020

Report Price: £3254.83 | \$4395.00 | €3662.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Table of Contents

Overview

What you need to know

Definition

Executive Summary

Market overview

Key trends

Performance drinks pack a lot of power into a small package

Figure 1: Total US retail sales of sports and performance drinks, by segment, at current prices, 2019

Peak performance for all

Figure 2: Fitness segmentation

The best laid trends can go to waste

Figure 3: Drinks consumed, January 2020

It's what's inside the bottle that counts

Figure 4: Purchase motivators, January 2020

What it means

The Market – What You Need to Know

Slow but steady sales could win the race

What other categories are at the starting line?

Grocery stores looking for a place on the podium

Market Size and Forecast

Running a marathon, not a sprint

Figure 5: Total US sales and fan chart forecast of market, at current prices, 2014-24

Figure 6: Total US sales and forecast of sports and performance drinks, at current prices, 2014-24

Market Breakdown

Sports drinks quench consumers' thirst

Figure 7: Total US retail sales of sports and performance drinks, by segment, at current prices, 2019

Figure 8: Total US retail sales and forecast of sports drinks, at current prices, 2014-24

Figure 9: Total US retail sales and forecast of sports drinks, at current prices, 2014-24

Grocery stores clocked a new personal best

Figure 10: Total US retail sales of sports and performance drinks, by channel, at current prices, 2014-19

Market Perspective

BFY is setting up hurdles

BFY beverages

Figure 11: Competing functional drinks

BFY snacks and bars

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Sports and Performance Drinks - US - March 2020

Report Price: £3254.83 | \$4395.00 | €3662.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 12: Competing functional snacks

Market Factors

The war on sugar

Figure 13: Percent of people aged 20 or older who are overweight or obese, 2001-02 to 2015-16

Aging population may shift functional needs

Figure 14: Population aged 18+, by age, 2014-24

Specialty retailers are throwing out the playbook

Key Players – What You Need to Know

MVPs are slowly losing share to new players

Brands are facing off against themselves

Hosting open tryouts to find the next big consumer group

Company and Brand Sales of Sports and Performance Drinks

Zero-sugar claims kept leading brands off the bench

Figure 15: Leading zero sugar energy drinks, 2018-19

Figure 16: Multi-outlet sales of sports drinks, by leading companies and brands, rolling 52 weeks 2018 and 2019

Small but powerful brands are driving the performance drink market

Figure 17: Optimum Nutrition's AMIN.O ENERGY, February 2020

Figure 18: Multi-outlet sales of performance drinks, by leading companies and brands, rolling 52 weeks 2018 and 2019

What's Working?

BODYARMOR could go pro

From the consumer

From the consumer

Figure 19: BODYARMOR and BODYARMOR Lyte, 2018-19

Propel is the perfect storm

Figure 20: Propel RTD and powder 2018-19

Stepping off the field and into the board room

Figure 21: Celebrity investments in sports drinks

Private label: an underdog story

Figure 22: Private label performance drinks

What's Struggling?

Too many players on the field

Figure 23: Purchase intelligence – Gatorade vs Powerade

The walls between performance drinks are falling

Figure 24: Blurring performance drinks

What to Watch

Coca-Cola could steal a base

Powerade Ultra: for the power lifter

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Sports and Performance Drinks - US - March 2020

Report Price: £3254.83 | \$4395.00 | €3662.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 25: Powerade Ultra – February 2020

Power Water: for the power walker

Figure 26: Power Water – February 2020

A new wave of fans are rushing the market

Approachable energy for the everyday exercisers

Figure 27: Simple drink claims

Focus fuels eSports athletes

Figure 28: Performance drinks for gamer health, February 2020

Maximize performance through personalization

Figure 29: Gainful Protein Powder, February 2020

Brains need a boost too

Figure 30: Common performance drink ingredients with cognitive effects, February 2020

Figure 31: Functional drinks with clear cognitive claims

Figure 32: Functional drinks without clear cognitive claims

The Consumer – What You Need to Know

Defining “athlete”

Consumers want their heart rate up, sugar content down

Protein knocks it out of the park

Sports and Performance Drink Consumption

The difference between “active” and “athlete”

Figure 33: Fitness segmentation, January 2020

Young men play to win – who is getting sidelined?

Figure 34: Fitness segmentation, by age and gender, January 2020

Split between “like” and “love”

Figure 35: Repertoire analysis – drinks consumed, by fitness segmentation, January 2020

Traditional sports drinks hold the championship belt

Figure 36: Drinks consumed, January 2020

Clean label yields messy results

Figure 37: Natural sports drinks vs other sports drinks

Consumption Occasions

Similar benefits, different functions

Figure 38: Consumption occasions, January 2020

Separating the marathon runners from the mall walkers

Figure 39: Consumption occasions, by fitness segmentation, January 2020

Shifts in Consumption

Protein has growth potential in an otherwise mature market

Figure 40: Shifts in consumption. January 2020

Athletes are driving growth

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Sports and Performance Drinks - US - March 2020

Report Price: £3254.83 | \$4395.00 | €3662.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 41: Shifts in consumption, by fitness segment, January 2020

Hydration and health make a great team

Water is weighing heavily on sports drinks

Figure 42: Reasons for drinking more sports drinks, January 2020

Figure 43: Reasons for drinking less sports drinks, January 2020

Protein pulls consumers in

Figure 44: Reasons for drinking more protein drinks, January 2020

Purchase Motivators

Gain favor through flavor

Startups need to play ball

Figure 45: Purchase motivators, January 2020

Figure 46: TURF analysis – drink purchase motivators, January 2020

Methodology

High-performing athletes have high standards

Figure 47: Purchase motivators, by fitness segment, January 2020

Attitudes toward Sports and Performance Drinks

A healthy option for everyone

Figure 48: Attitudes toward sports and performance drinks, January 2020

Goals shape attitudes

Figure 49: Attitudes toward sports and performance drinks, by fitness segment, January 2020

Get parents on your team

Figure 50: Attitudes toward sports and performance drinks, by parental status, January 2020

Appendix – Data Sources and Abbreviations

Data sources

Sales data

Fan chart forecast

Consumer survey data

Abbreviations and terms

Abbreviations

Appendix – The Market

Figure 51: Total US retail sales and forecast of sports and performance drinks, at inflation-adjusted prices, 2014-24

Figure 52: Total US retail sales and forecast of sports and performance drinks, by segment, at current prices, 2014-24

Figure 53: Total US retail sales of sports and performance drinks, by segment, at current prices, 2017 and 2019

Figure 54: Total US retail sales and forecast of sports drinks, at current prices, 2014-24

Figure 55: Total US retail sales and forecast of sports drinks, at inflation-adjusted prices, 2014-24

Figure 56: Total US retail sales and forecast of performance drinks, at current prices, 2014-24

Figure 57: Total US retail sales and forecast of performance drinks, at inflation-adjusted prices, 2014-24

Appendix – Retail Channels

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Sports and Performance Drinks - US - March 2020

Report Price: £3254.83 | \$4395.00 | €3662.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 58: Total US retail sales of sports and performance drinks, by channel, at current prices, 2014-19

Figure 59: Total US retail sales of sports and performance drinks, by channel, at current prices, 2017 and 2019

Figure 60: US supermarket sales of sports and performance drinks, at current prices, 2014-19

Figure 61: US drugstore sales of sports and performance drinks, at current prices, 2014-19

Figure 62: US sales of sports and performance drinks through other retail channels, at current prices, 2014-19

Appendix – Key Players

Figure 63: Multi-outlet sales of sports and performance drinks, by leading companies, rolling 52 weeks 2018 and 2019

Appendix – The Consumer

Figure 64: Correspondence analysis – symmetrical map – beverage comparison, January 2020

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com