Global Market for Sports Nutrition and Dairy Ingredients 2017-2021

Published September 2017
Report Outline

- Introduction and Methodology
- Sports Nutrition Market and Dairy Ingredients used
  - Global Sports Nutrition Market Data and Trends
  - Key Players and Distribution Channels
  - Ingredient Volume Usage and Major Users
  - Ingredient Applications and Product Launches
  - Key Dairy Ingredient Companies
  - Dairy Ingredient Trade Analysis
- Report Summary
- Appendix (Sport Nutrition Data for Key Markets)
Market Research Approach
- Sports Nutrition Markets and Dairy Ingredients used

- Product Scope
- Market Scope
- Key Players
- Global Market Trends
- Dairy Ingredients in SN
- Dairy Ingredients Trade Analysis

- Protein powder
- Ready-To-Drink RTD
- Sports bars
- Other products – gels, tablets, etc.

- Global
- Western Europe
- Eastern Europe
- North America
- Latin America
- Australasia
- Asia Pacific
- Middle East

- Top 20 global sports nutrition companies
- Top 20 global brands per market
- Distribution channels

- Consumer segments
- Product trends
- Consumer trends

- Application/volume usage of dairy ingredients
  - WPC
  - WPI
  - WPH
  - Native Whey
  - MPC
  - MPI
  - MPH
  - Caseinate
  - Micellar Casein

- Competitive structure
- Key dairy ingredient companies focusing on sports nutrition

- Value per market
- Volume per market
- CAGR 2016-2021
- Per capita spending

- Import and export per market
  - WPC
  - WPI
  - MPC
  - MPI
Sports Nutrition products are positioned in the marketplace as improving physical endurance, increasing muscle growth/development/mass, or speeding recovery after exercise. The products are sold in powder, bar, ready-to-drink, gel or tablet formats. Both protein and non-protein based products are included. However, sugar based drinks often positioned as sports nutrition (e.g. Gatorade), energy drinks (e.g. Red Bull), and energy bars (e.g. PowerBar) are not included.

Non-protein products do not have protein as their core ingredient. Common positioning’s include boosting energy, delaying the onset of fatigue, increasing strength and promoting muscle recovery. Common ingredients include amino acids, carbohydrates, creatine, beta alanine and caffeine.

The Sports Nutrition category definition includes bars, powder and RTD’s with more than 20 grams of protein in absolute volume, irrespective of packaging size.
Methodology for Ingredient Analysis in Sports Nutrition

Ingredients:
- Micellar casein
- Native whey
- WPI
- WPC
- WPH

Caseinates
- MPH
- MPI
- MPC

Time Frame:
January 2012 – December 2016

Geography:
Global and Key Regions

Category:
Sports Nutrition

Methodology implications:
The used database (INNOVA) does not record all launches in SN, particularly given internet sales. However, the examples shown are thought to be representative of all product launches.

Product example:
- COMPANY: Universal Nutrition
- COMPANY WEBSITE:
  http://www.universalsports.com/
- BRAND: Real Gains
- PRIVATE LABEL: No
- COUNTRY: United States
- PRODUCED IN: United States
- REGION: North America
- CATEGORY: Sports Powders
- EVENT: New Product
- EVENT DATE: Oct 2015
- PRICE IN USD: $75.95
- PRICE IN EURO: EUR 69.87
- LOCAL PRICE: USD 75.95
- PRICE / KG IN USD: USD 24.50
- PRICE / KG IN EURO: EUR 22.54
The global Sports Nutrition market amounted to approx. **USD 11.9 bio. in 2016**, exhibiting a **CAGR of approx. 9% between 2011-2016**.

The Sports Nutrition market is forecast to continue growing around **8% annually** to reach more than **USD 17 bio. in 2021**.
Global Sports Nutrition Market Data and Trends - North America the largest and fastest growing region

Retail values RSP 2016 and growth per region 2011-2016

- **North America**
  - Value: USD xxx mio.
  - CAGR 2011-16: xx%

- **Western Europe**
  - Value: USD xxx mio.
  - CAGR 2011-16: xx%

- **Middle East & Africa**
  - Value: USD xxx mio.
  - CAGR 2011-16: xx%

- **Asia-Pacific**
  - Value: USD xxx mio.
  - CAGR 2011-16: xx%

- **Eastern Europe**
  - Value: USD xxx mio.
  - CAGR 2011-16: xx%

- **Latin America**
  - Value: USD xxx mio.
  - CAGR 2011-16: xx%

- **Oceania**
  - Value: USD xxx mio.
  - CAGR 2011-16: xx%
The global sports nutrition market is estimated to grow **8% annually** towards 2021.

**Protein powder** and **protein RTD** are the two biggest and fastest growing product categories.
Sports Nutrition has seen continued expansion of its consumer base from just the core users, i.e. bodybuilders and serious athletes, to a wide array of consumers looking to live a healthier and more active lifestyle, so-called Active Nutrition.

Sports protein products, particularly protein powder, remain the major Sports Nutrition sales category accounting for more than 80% of global sales value and is expected to continue growing with protein derived from whey ingredients being most significant.

With a greater focus on overall health and more consumers looking for clean label products, an increasing demand for natural ingredients has been seen in Sports Nutrition. Ingredients such as organic and grass-fed whey proteins and also plant-based proteins have gained prominence due to both health as well as ethical concerns.
Applying the calculation method explained in the methodology, the estimated volumes of SN consumer products are used to calculate the volume of high-concentration protein ingredients used in SN.

This results in 2016 volume estimates below:

<table>
<thead>
<tr>
<th>2016 Volume estimates ('000 MT)</th>
<th>Consumer products</th>
<th>Protein ingredients</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>WP</td>
</tr>
<tr>
<td>TOTAL</td>
<td></td>
<td>xxx</td>
</tr>
<tr>
<td>Protein powder</td>
<td></td>
<td>xxx</td>
</tr>
<tr>
<td>Protein bars</td>
<td></td>
<td>xxx</td>
</tr>
<tr>
<td>Protein RTD</td>
<td></td>
<td>xxx</td>
</tr>
<tr>
<td>Other SN</td>
<td></td>
<td>xxx</td>
</tr>
</tbody>
</table>

Note: Methodology described in the introduction section applied.
Ingredient Applications
- Whey Protein Concentrate in SN 2012-2016 (1)

Product Launches by Year

Product Launches by Top 15 Countries

3,089 products launched globally

United States: 1,511

44 other countries with product launches.
### Ingredient Applications
- Whey Protein Concentrate in SN 2012-2016 (2)

<table>
<thead>
<tr>
<th>Company</th>
<th>Country</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cytosport</td>
<td>Brazil</td>
<td>June 2016</td>
</tr>
<tr>
<td>Musclepharm</td>
<td>Germany</td>
<td>Aug 2015</td>
</tr>
<tr>
<td>Myprotein</td>
<td>UK</td>
<td>Mar 2016</td>
</tr>
<tr>
<td>BSN</td>
<td>USA</td>
<td>Oct 2014</td>
</tr>
<tr>
<td>Myprotein</td>
<td>France</td>
<td>Nov 2013</td>
</tr>
</tbody>
</table>

**Product Launches by Category**

- **Sports Powders; 2,375**
- **Sports Protein Based Rtd; 182**
- **Sports Bars; 414**
- **Sports Drinks Rtd; 3**
- **Sports Supplements; 34**
- **Sports Others; 81**
Sports Nutrition in UK - Market Size and Growth Rates

Trends and outlook

- Sports nutrition in the UK exhibited double-digit annual growth over the review period to reach USD 831 mio.
- The media and advertising have played a strong role in sports nutrition achieving a mainstream platform.
- Recently, women have become a target in Sports Nutrition advertising with celebrities promoting high-protein diets to achieve the ‘perfect’ body, though not without controversy.
- In 2016, 30% of sales were made online, illustrating the continued shift towards online retailing.
- Protein bars posted the highest annual growth over the review period at 27.7% in current value terms.
- Sports nutrition is predicted to post a value CAGR of 12% at constant 2016 prices in the forecast period, with Protein RTD expected to show strongest growth.
- Top 5 companies % market shares: The Hut Group Ltd 20.2%, Holland & Barrett Retail Ltd 9.9%, Maxinutrition Ltd 8.2%, Reflex Nutrition Ltd 4.1%, PhD Nutrition Ltd 4.0%.

Note: Bubble sizes and illustrated figures indicate 2016 category volumes in ‘000 MT.
Global Sports Nutrition Report – Project Management and Costs

3A Business Consulting team:
- Managing partner - Tage Affertsholt
- Junior consultant – Daniel Pedersen

Report available in PDF format – in total more than 90 slides – from end August 2017

EUR 3,600