Sports Nutrition: European market, consumer trends, and innovation

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1. Introduction

The present consumer and market report, titled **"Sports Nutrition: European market, consumer trends, and innovation",** provides an analysis of the sports nutrition sector, with a special focus on health. The geographical scope of the report is Europe, spotlighting the Atlantic Area countries (France, Ireland, Portugal, Spain, and United Kingdom). In the report, the production, value and volume of sales of the sector, as well as product launching, main positionings, consumer trends and market health claims were evaluated. The main information sources have been Innova Database, Innova Markets Insights, GlobalData, and European Commission databases, among others.

The following categories have been analysed: Sports Bars, Sports Drinks, Sports Powders, Sports Supplements and Other Sports Products. The category Sports Bars include supplemental bars containing cereal and other high energy foods targeted to sports men/women to have the needed energy and proteins everyday. They are designed to provide muscles with the fast-acting, long-lasting whole food energy they need to endure. The category Sports Drinks includes Sports Drinks RTD (Ready to Drink) and Sports protein-based drinks RDT. The latter include products with protein as a base for the ready-to-drink beverage. These products would normally claim high levels of protein and would be clearly displayed on the front of the package. Also includes shot formats. The category Other Sports Products include all other sports products not listed in the above categories such as energy snacks and bites, cookies, pouches, energy gels, powdered cereals and powdered flours for baking, which are developed specifically for athletes to help with performance or recovery.

The present report is part of a series of "consumer, market and innovation reports" that represent one of the several innovation support services for SMEs implemented in the scope of the project **"AHFES - A quadruple helix Atlantic Area healthy food ecosystem for growth of SMEs"**. The aim of this service, delivered by the Galician Food Cluster (Clusaga), is to provide to Atlantic Area SMEs working in the healthy food segment with information and knowledge helpful to guide their strategies within a specific market sector or country, as well as for the preparation of their product or commercial strategies.

AHFES: A quadruple helix Atlantic Area healthy food ecosystem for growth of SMEs

AHFES (*Atlantic Healthy Food EcoSystem*) is a European project funded by the Interreg Atlantic Area programme. The purpose of AHFES is to improve the overall competitiveness and growth of SMEs in the value chain of healthy food & lifestyles by contributing to enhancing a transnational innovation ecosystem that helps SMEs access knowledge, partners and markets and align their products and services to consumer needs and expectations.

Throughout the project duration (form March 2019 to August 2022), AHFES will deliver the following outputs:

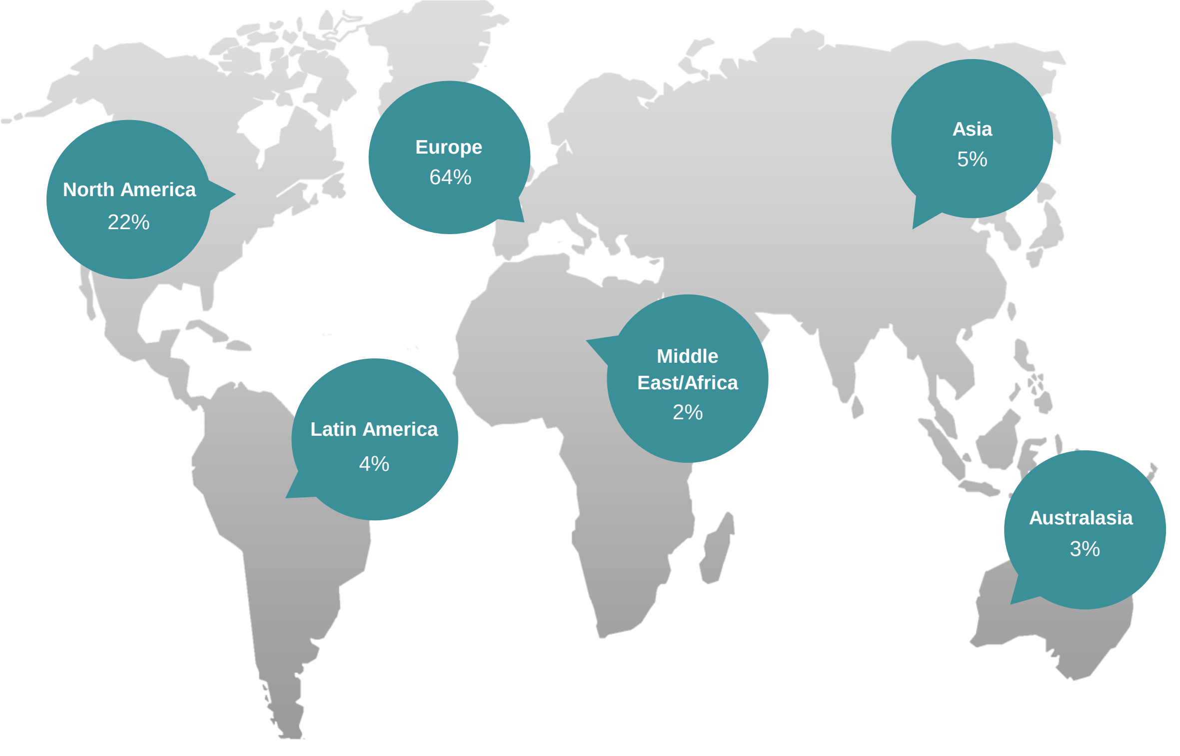
- Intelligence gathering on current consumer trends regarding healthy food and lifestyles
- Mapping of the Atlantic Area healthy food and lifestyles innovation ecosystem
- Facilitation of networking and support in building transnational innovation partnerships
- Innovation training actions for SMEs
- Services tailored to SME needs

AHFES is implemented by the following organisations:

2. Sports Nutrition Market

The market size of sports nutrition reached almost 11 USD billion in 2020 and product launches in sports nutrition are on a growth path. It is a growing market with expectations to surpass 34 USD billion in 2028 at a yearly growing rate of around 11%. Europe is the frontrunner in global sports nutrition launches with 64% of the total launches in 2020, followed by North America (22%).

Region as a percentage (%) of global sports nutrition launches tracked (2020)



Source: Innova Market Insights

Historically, sports nutrition products were designed particularly for athletes and sports professionals. Nowadays, the market is undergoing a switch towards a mainstream consumption due to the high demand from a diverse group of consumers. Both professionals and amateur exercisers are looking for products than can supply an extra boost in their workout routines, but also in the pre-workout preparation and to aid post-workout recovery.

Moreover, there is a general increase of consumers interested in their individual health and wellbeing. Also, there is a rising awareness of the importance of fitness and physical performance as a means of promoting good mental health and preventing chronic diseases.

These factors contribute to the development of new sports nutrition products, which respond to the rising consumer demand.

Myprotein and Prozis are the main two brands in the sports nutrition market globally, and together account with most of the market share.

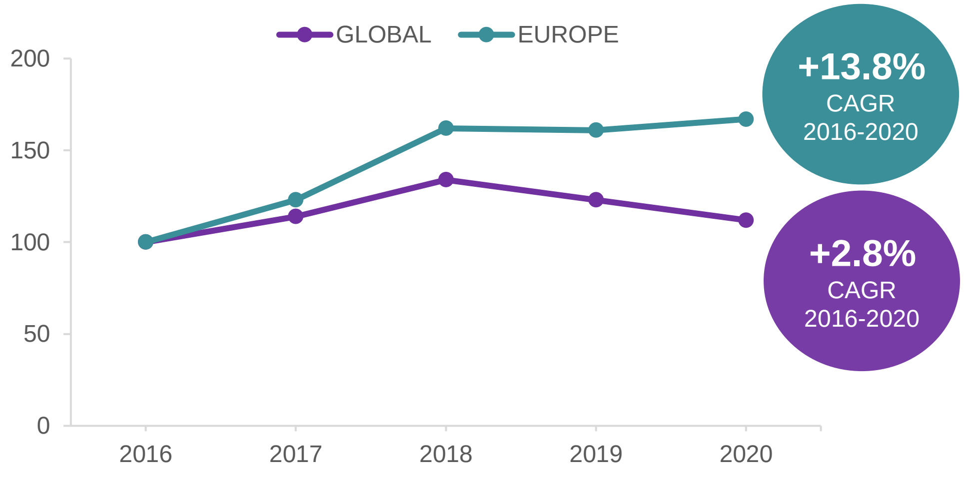
Ranking of the top five most valuable sports nutrition brands in 2020 worldwide.

Position	Brand name	Revenue (million USD)
1	Myprotein	314.3
2	Prozis	115.2
3	Gymbeam	11.5
4	Biotechusa	10.0
5	Bodylab	7.4

Source: ecommercedb.com

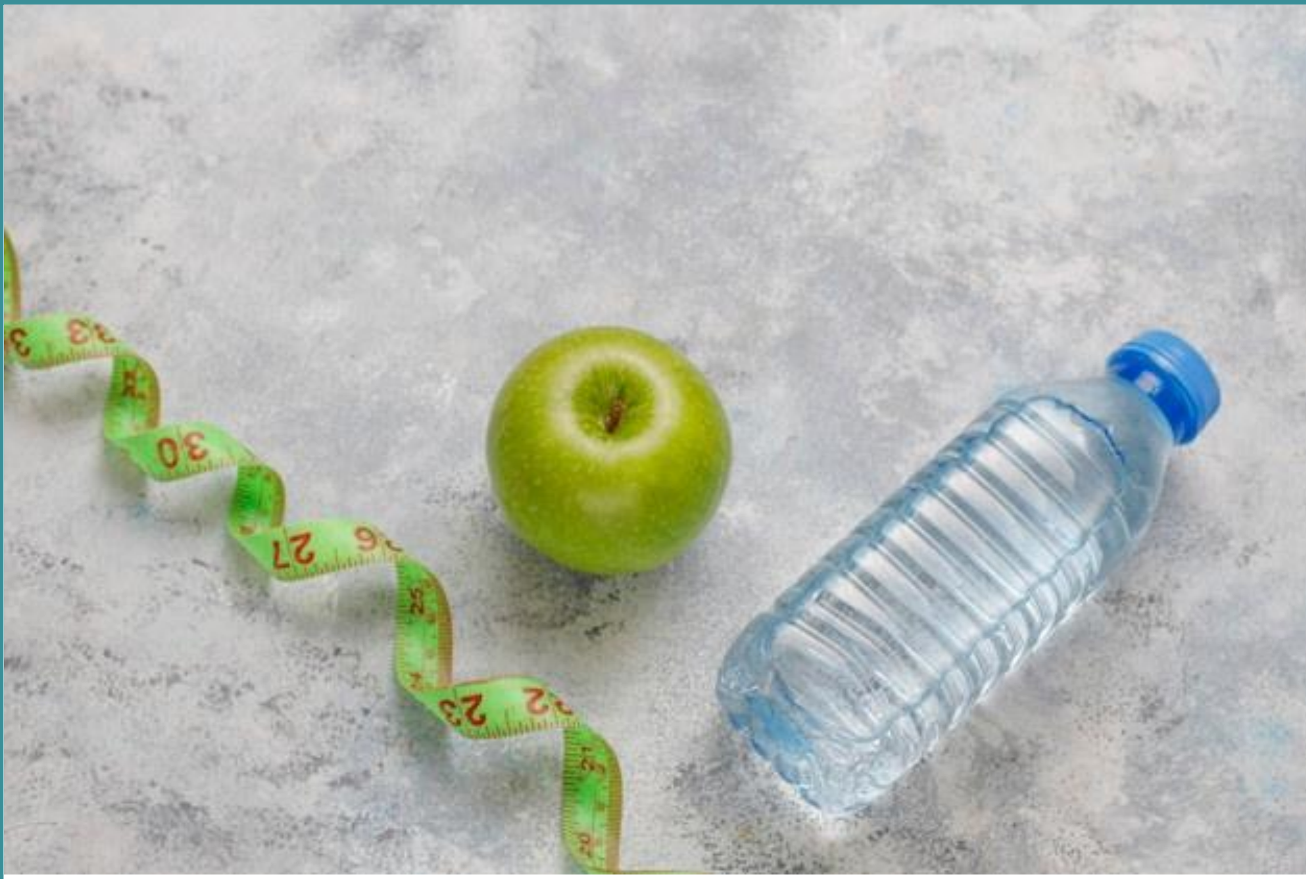
In terms of new products development, Europe presented a growth of 13.8% within the period 2016-20, which is four times higher than the global market, with a growth of 2.8%.

Indexed number of sports nutrition launches (Global, Index 2016=100)



United Kingdom, Germany, Spain, and France cover 75% of the sports nutrition market. Particularly, United Kingdom and Germany dominate the market with over 50% of the share, with 27% and 24% of market share, respectively. United Kingdom is predicted to be the fastest growing market. Factors such as the high prevalence of chronic diseases and the need for a change of lifestyles towards healthier routines may push consumers to increase the consumption of sports nutrition products. Since 2003, the industry has been regulated, monitored, backed, and promoted by the European Specialist Sports Nutrition Alliance (ESSNA) – the trade association representing the interests of the sector across Europe.

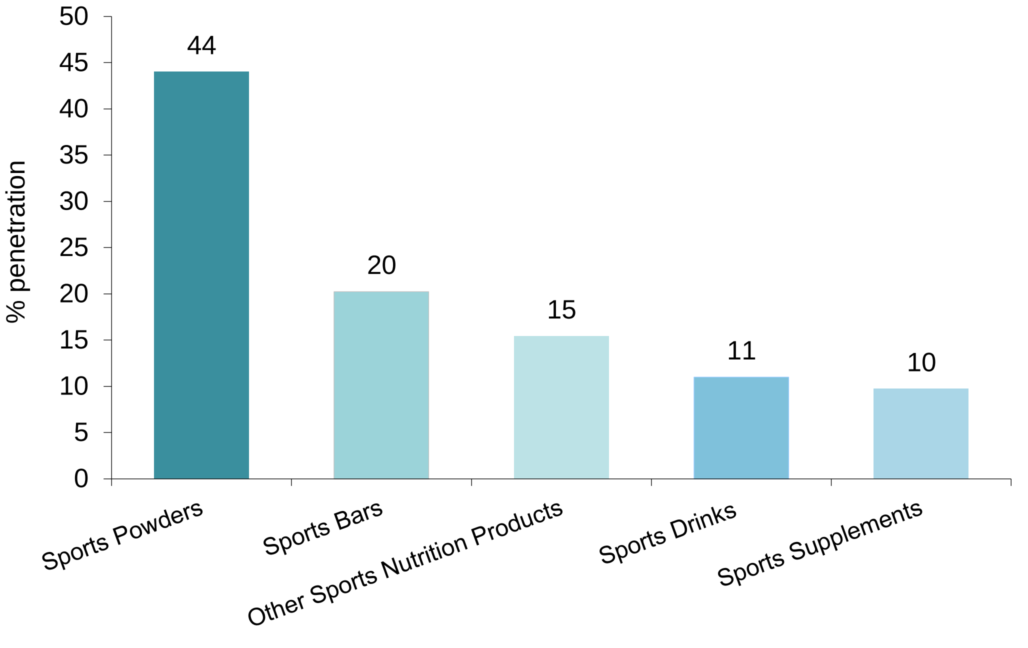
3. Healthy new products and positioning



3.1 New products development in Europe

Sports powders is the category with the highest market innovation, accounting two times more product development than the next category, Sports Bars. Both categories are growing with a CAGR of 20.1% and 11.8%, respectively. Other growing categories are ready-to-drink (RTD) sports protein-based products (5.0%), sports drinks (5.5%) and sports others (15.4%).

Sports nutrition NPD in Europe (2016-2020)



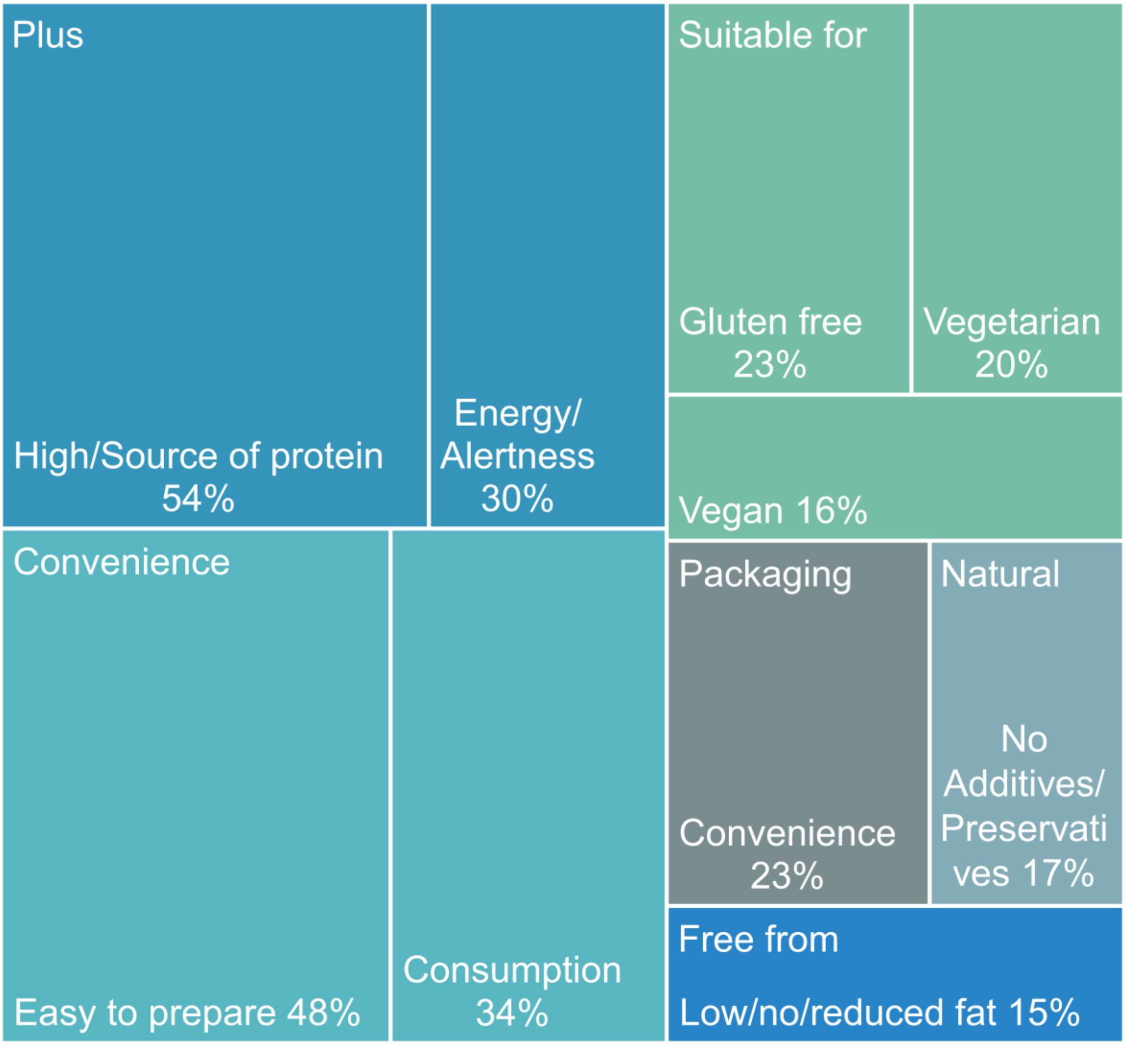
Hydrolyzed whey protein isolate powder with grapefruit flavour **(United Kingdom)**.

Chocolate flavoured protein bar **(France)**.

3.2 Positioning in the European market

High/Source of protein is the main positioning claim among most of the categories, present in 54% of the new sports nutrition products, and grows at a rate of 16.5%. Also, the global trend of convenience and on-the-go consumption is reflected in the positioning claims of new products, since *Easy to prepare* and *Convenience consumption* stand out as popular positioning clams with a penetration 48% and 34%, respectively. Additionally, both positioning claims grow at a rate of 19.8% and 17.2%, respectively. Other recurrent claims are *Energy/alertness* (30%), *Gluten free* (23%), and *No additives/preservatives* (17%).

The strong growth of *Convenience packaging* (90.4%) is remarkable and other growing positioning claims are *Vegan* (26.8%), *No additives/preservatives* (27.4%), *Low/no/reduced fat* (15.9%), *Energy/Alertness* (11.9%), *Gluten free* (9.0%), and *Vegetarian* (7.6%).



3.3 Top brands in AHFES countries

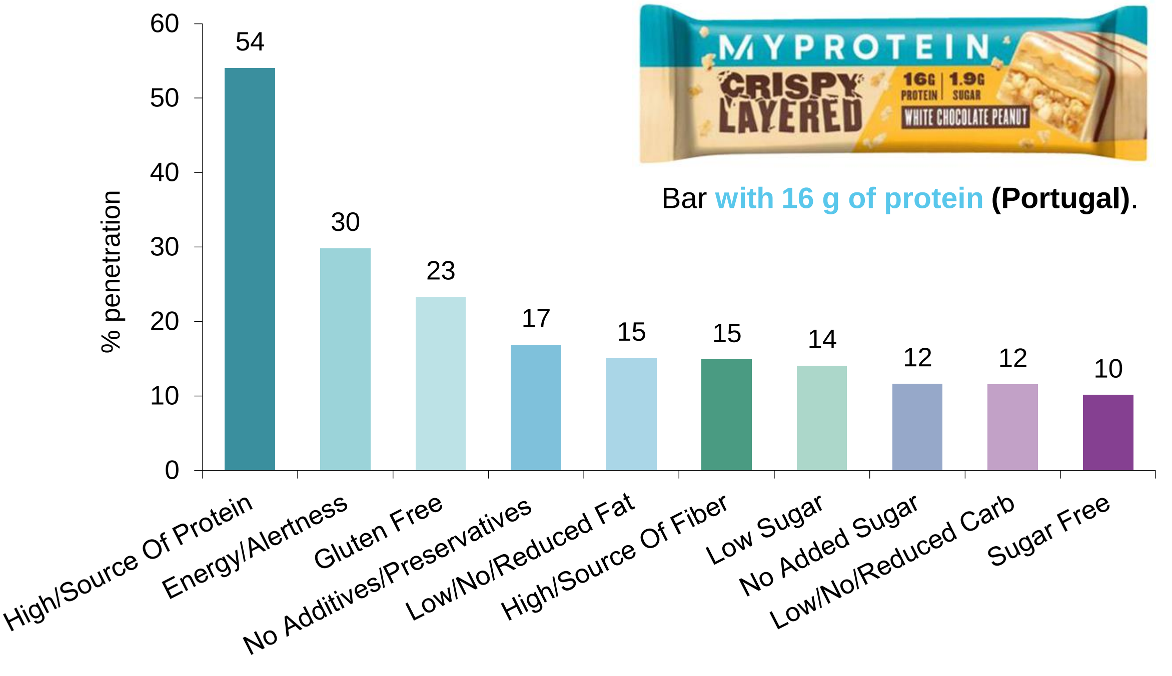
Branded products represent about 85% of the market. However, the growth of private labels is noteworthy with a CAGR of 82.3%. Myprotein and Prozis occupied the first two positions within the top 10 ranking in AHFES countries. Myprotein is the top brand in Spain and United Kingdom, and Prozis is the top brand in France, Portugal and Ireland.

Top 10 brands	Spain	France	United Kingdom	Portugal	Ireland
1	Myprotein	Prozis	Myprotein	Prozis	Prozis
2	Prozis	Myprotein	Prozis	Myprotein	Myprotein
3	Nutrisport	Nutrend	Usn	Biotechusa	Kinetica
4	Qnt	Weider	Maximuscle	Scitec Nutrition	Weider
5	Weider	Powerbar	Phd	Gold Nutrition	Bulk Powders
6	226Ers	Overstim S	Applied Nutrition	Iswari	Nxt Nutrition
7	Biotechusa	Biotechusa	Optimum Nutrition	Qnt	Nutrend
8	Amix	Qnt	High5	Clif Bar	Sis
9	Scitec Nutrition	Foodspring	Cnp	Isostar	Optimum Nutrition
10	Powergel	Scitec Nutrition	Kinetica	Eu Nutrition	Olimp

3.4 Health claims in the European market

High/source of protein stands out as the main health claim, and it is included in 54% of the new products. The subsequent health claims are *Energy/Alertness*, *Gluten Free* and *No additives/preservatives.* The top 10 health claims are all growing and the growth of *No added sugar* (42.9%), *Low sugar* (32.1%), *High/source of fiber* (31.1%), *Sugar free* (28.9%) and *No additives/preservatives* (27.4%) is notable. The remaining health claims are growing at different rates of 15.5% (*Low/no/reduced fat*), 11.9% (*Energy/Alertness*), 9.0% (*Gluten free*) and 2.8% (*Low/no/reduced carbohydrates*).

Top 10 health claims in Europe (2016-2020)



Bar **with 16 g of protein** **(Portugal)**.

Pre-workout food supplement **enriched with l-tyrosine** **(Spain)**.

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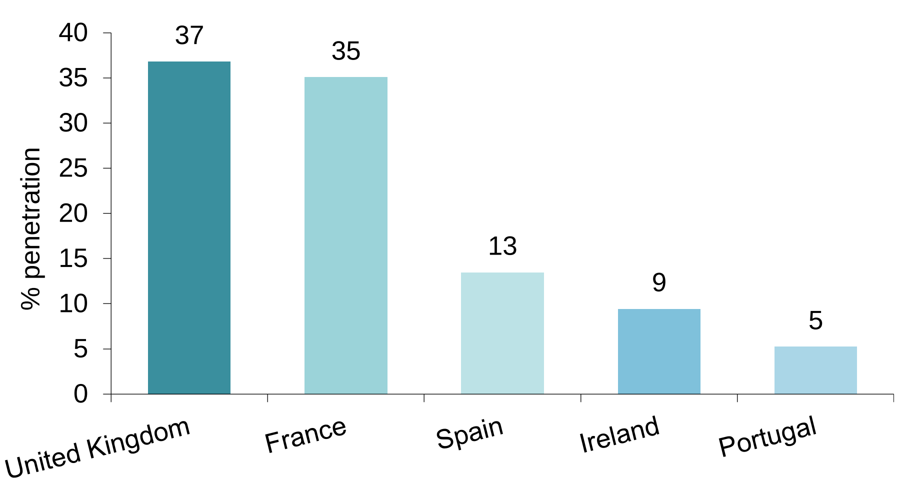
3.5 New products development in AHFES countries

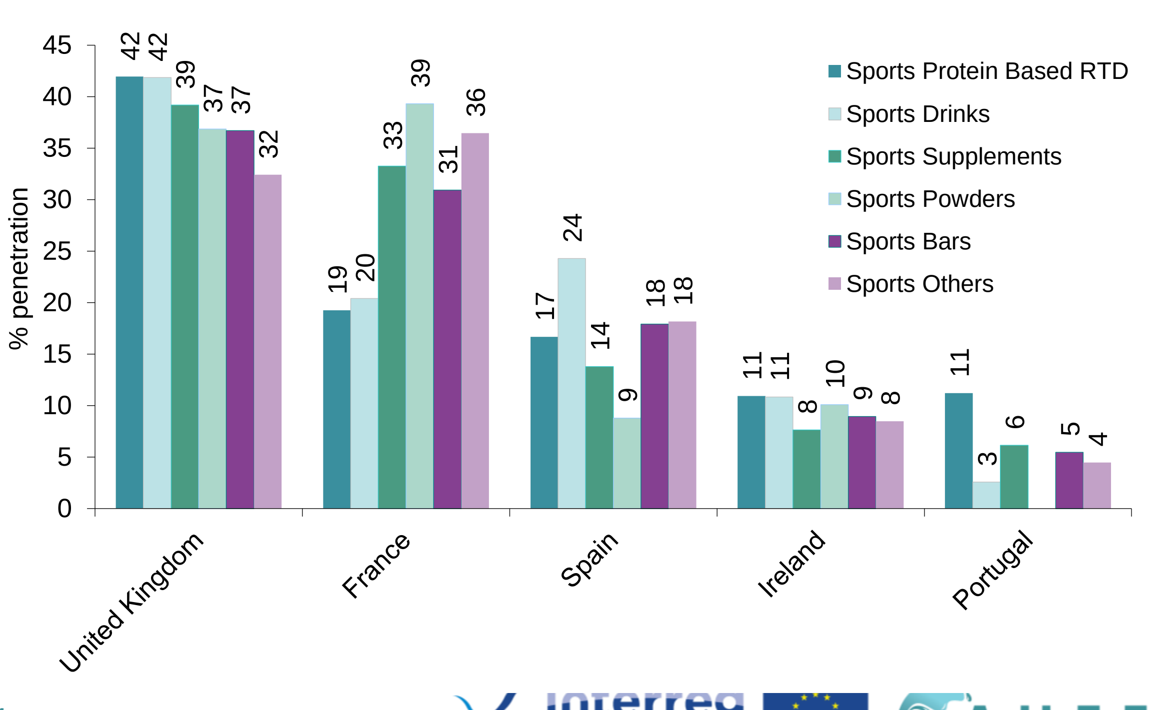
United Kingdom and France are the countries with the most product development in AHFES countries, followed by Spain, Ireland and Portugal.

Sports nutrition NPD in AHFES countries (2016-2020)



Sports drinks, including protein-based sport drinks, are among the top categories in all AHFES countries except by France, where sports powders is the main category. Sport bars is a category with a strong presence in all AHFES countries.

Sports nutrition NPD in AHFES Countries (2016-2020)



3.6 Main health claims in AHFES countries

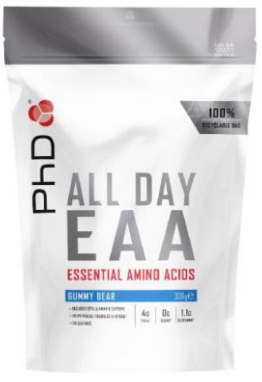
The main health claims in AHFES countries are *High/source of protein* and *Energy/Alertness* which are growing in all AHFES countries with the exception of France. *Gluten free* is also widely present, and growing in all AHFES countries. Other recurrent health claims are *High/Source of fiber,* which is in growth in all countries but United Kingdom, and *No Additives/preservatives.* Other widely growing claims are *Low sugar*, *Low/No/Reduced fat* and *No added sugar*.

Top 10 Health Claims by country (2016-2020)

Region	1. High/ Source of protein	2. Energy/ Alertness	3. Gluten Free	4. High/ Source of fiber	5. No Additives/ Preservatives	6. Low sugar	7. Low/No/ Reduced fat	8. No added sugar	9. Low/No/ Reduced calories	10. Bone health
Spain	46%*	36%*	24%*	17%*	15%*	13%*	12%*	10%*	9%	8%*
Portugal	54%*	27%*	21%*	18%*	17%*		15%*	10%*		14%*
France	49%	37%	28%*	14%*	25%	12%*	14%	15%*	11%	
United Kingdom	55%*	32%*	22%*	12%	15%	18%*	14%*	11%*	10%*	
Ireland	23%*	30%*	21%*	15%*	16%*	18%*	16%*			

*growing trend
Colour code highlighting Top 1-3 health claims: #1 #2 #3
Percentages indicate the % of new products carrying the claim

Low fat and high protein drinkable quark **(Spain)**.



Gluten free Amino Blend Powder With Summer Fruits flavour **(United Kingdom)**.

Vegan powder **with 29 g of protein** **(Ireland)**.

4. Top trends

4.1. New formats and convenience

Consumers are growing looking for a replacement of traditional presentations such as protein shake or protein bars. High-protein dairy products such as protein-enriched yogurts, gels, or portable beverages are increasingly consumed. Moreover, snacking habits are evolving, moving towards products that are more nutritious and allow a convenience and individual consumption. An interesting ingredient is collagen, as it is a versatile ingredient which can be easily formulated into a wide range of convenient, “to-go formats“.

A high protein bar “to go” with a blueberry flavour **with hydrolyzed collagen to contribute maintaining muscle mass** (**United Kingdom**)

Thus, the demand for products offering a quick and convenient nutritional boost is becoming increasingly relevant. The movement of the sports nutrition category towards a mainstream consumption, with products not only being consumed by sportspeople but by a general public, leads to the increase of on-the-go option easier to take and in novel formats.

Pre-workout shot, a blend of ingredients including including vitamin B, creatine and caffeine, with sour berry flavour, in a **60 ml plastic bottle** (**Spain**)

4.2. Functional beverages: mental and gut health, wellness and recovery

The pandemic has renewed consumer's attention to health. Sports nutritional supplements such as pre-workout products that include these benefits offer the additional advantage of supporting a focused workout for optimal performance.

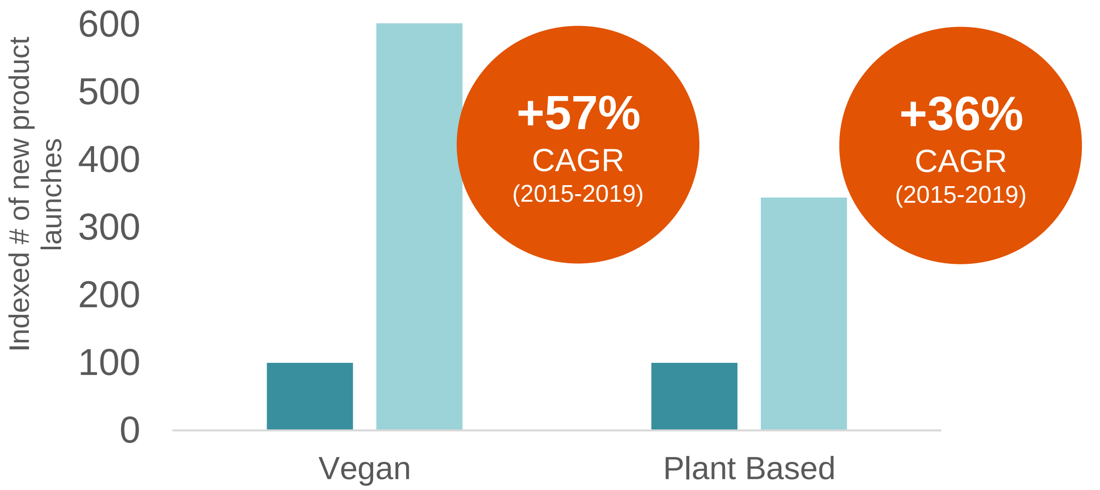
Pre-workout capsules containing garcinia cambogia, raspberry ketones or saffron extract for satiating effect, fat burning and mood boost, respectively. Other ingredients are vitamins B1 an B5 to contribute to normal energy-yielding metabolism (**United Kingdom**).

The new focus on holistic wellness has also put attention on the importance of healthy sleep. To cover this segment, sports nutrition products are manufactured with ingredients such as melatonin, L-theanine or chamomile. There is also a rise of new trends such as the use of nootropics to positively affect performance and recovery. Another focus is gut health by means of the use of probiotics. Healthy bacteria are known to contribute to protecting the immune system and reducing inflammation.

Bulk supplements and powders contain probiotics to improve intestinal health and reduce oxidative stress (**France**).

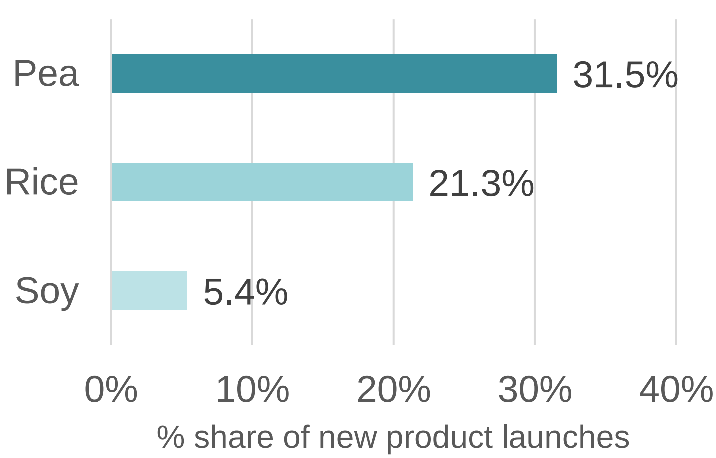
4.3 Plant powered nutrition

Consumers are incorporating more plant ingredients in their diet. According to the Innova Consumer Survey in 2019, 43% of consumers in United Kingdom increasingly incorporate plant ingredients in their diet. This is more prominent in the United States and China, where 49% and 71% of consumers have increased the consumption of plant ingredients. According to Innova Market Insights, both vegan and plant-based (including plant protein) claims are showing a strong growth considering the period 2015-2019.



Consumers are open to a variety of alternatives to animal protein, including rice, beans, potato, or maize protein. Particularly, pea and rice protein are the leading plant-based proteins, and pumpkin seed is a growing niche. Likewise, alternative plant proteins such as microalgae or fava bean are foreseen to be future opportunities. Consumers' pursuit for healthier and more sustainable lifestyles continues to drive plant-based nutrition. In bars, more inclusions of nuts, fruit, vegetables and botanicals are expected to be seen.

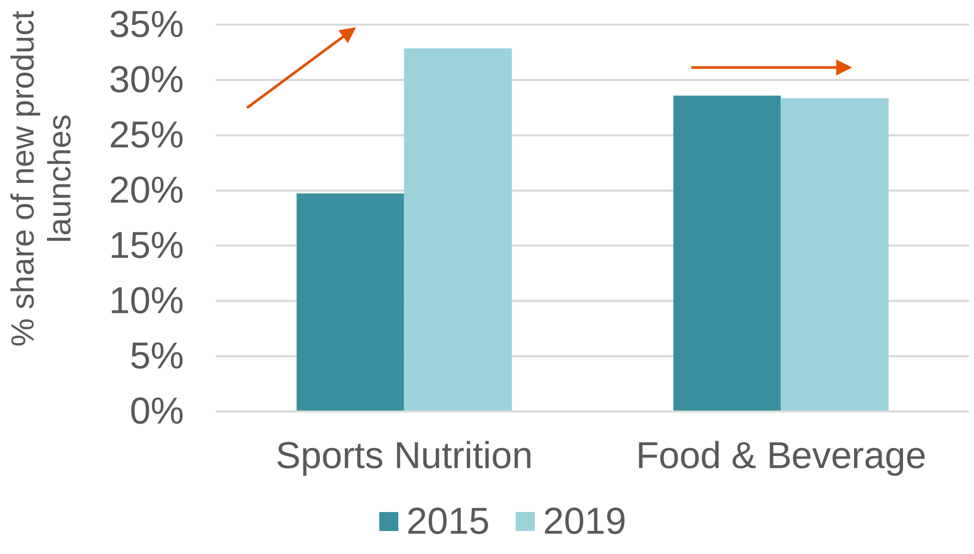
% share of new plant-based sports nutrition launches tracked by top protein (Global, 2019)



4.4 Clean nutrition

Transparency is a must for consumers, since according to Innova Consumer Survey in 2019, 56% of global consumers say that the stories around a brand influence their purchase decision. Knowing the origin of the ingredients or understanding the product's benefits are among the facts that lead consumers to trust a brand. In fact, there has been a high growth for a clean label in sports nutrition products since 2015 as consumer's are pushing for more transparency.

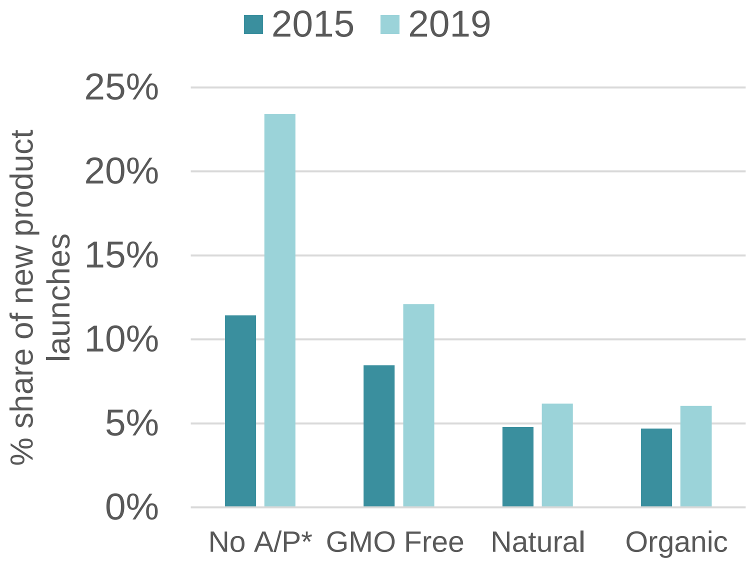
% share of new product launches tracked with a clean label claim by category of interest (Global, 2015 vs 2019)



Nuzest coconut or almond protein bar, ideal for a post workout, mid-morning or afternoon snack. **Natural ingredients**. Blending premium European Golden Pea Protein with raw seeds, nuts and fruit with a natural flavour (**United Kingdom**)

Current developments are mainly focusing on removing additives and preservatives. Consumers are looking for organic and no added artificial ingredients, which are considered as “clean label” food/beverage products. All clean label indicators are showing growth. It is expected that more holistic approaches to clean strategies will be seen due to their unique potential for differentiation.

% share of new sports nutrition launches tracked with selected clean label claims (Global, 2015 vs 2019)

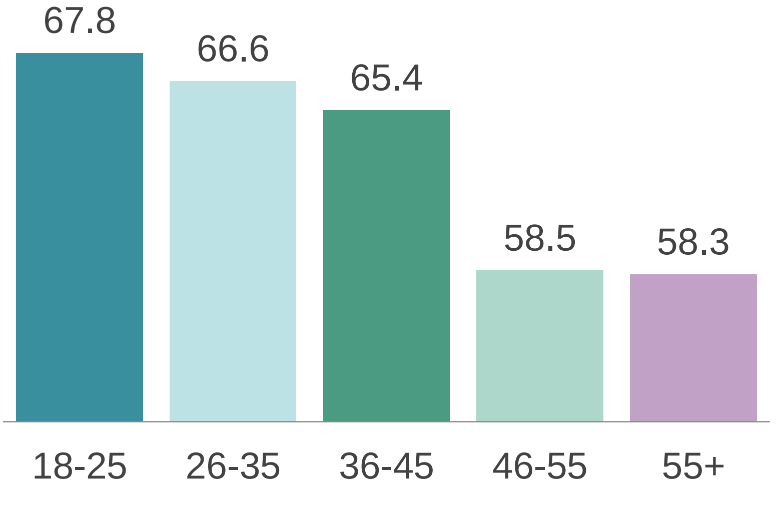


Biofair Nutrition Barre Amande Proteinee: Almond Protein Bar (**France**)

4.5. Personalised Nutrition

According to the American Nutrition Association, personalised nutrition is a field that leverages human individuality to drive nutrition strategies that prevent, manage, and treat disease and optimize health. It is a concept with great potential, and it is becoming more important in Europe since consumers are looking to tailor and choose what is best for them based on their personal physical, emotional, and lifestyle needs. Additionally, there is an increase in concern towards fitness-focused lifestyles and wellbeing, which is expected to directly impact the demand of functional sports nutrition products.

% of consumers that indicated that they specifically shop for products to meet their individual needs and tastes (by age group) (2018)

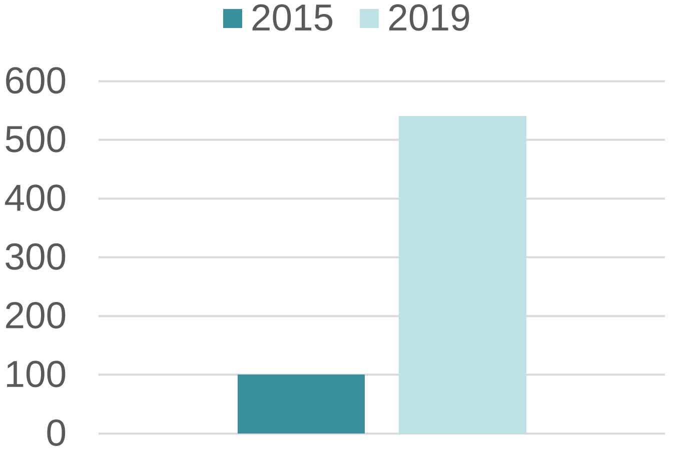


As a global trend, wider consumer diet trends also affect the sports nutrition sector. For instance, a keto diets promotes the development of healthy fats such as coconut oil, MCT oils, nut butter and plant-based oils/fats, and the keto/ketogenic claim presented a growth between 2016 and 2019 of 68%, according to Innova Market Insights.

Blue raspberry, summer fruits and orange flavoured amino acid intra-workout sports drink **keto friendly** **(Ireland)**

Another example is CBD, which incorporates potential extra benefits to sports nutrition. It is a fast-growing niche, and its suggested benefits could unlock market opportunities.

Indexed number of sports nutrition launches tacked with CBD (Global, 2015=100)



This 7NRG pre workout mango and pineapple CBD shake is made to **help in achieving homeostasis by regulating the body's endocannabinoid system. CBD has been shown to increase wakefulness and drive, to reduce fatigue and to increase focus** (**United Kingdom**)

Sports nutrition has generally been limited to hard core gym users and athletes, but this has expanded and now includes consumers with varied performance goals. Thus, personalisation in sports nutrition means bringing together traditional aspects and supplementing them to fill in more niche benefit gaps. For instance, performance nutrition products can offer a wide range of benefits ranging from reduced tiredness and fatigue to improved concentration and mental focus. Additionally, many consumers follow restrictive diets from veganism to keto, which enables new product innovation in this category.

4.6. Healthy indulgence

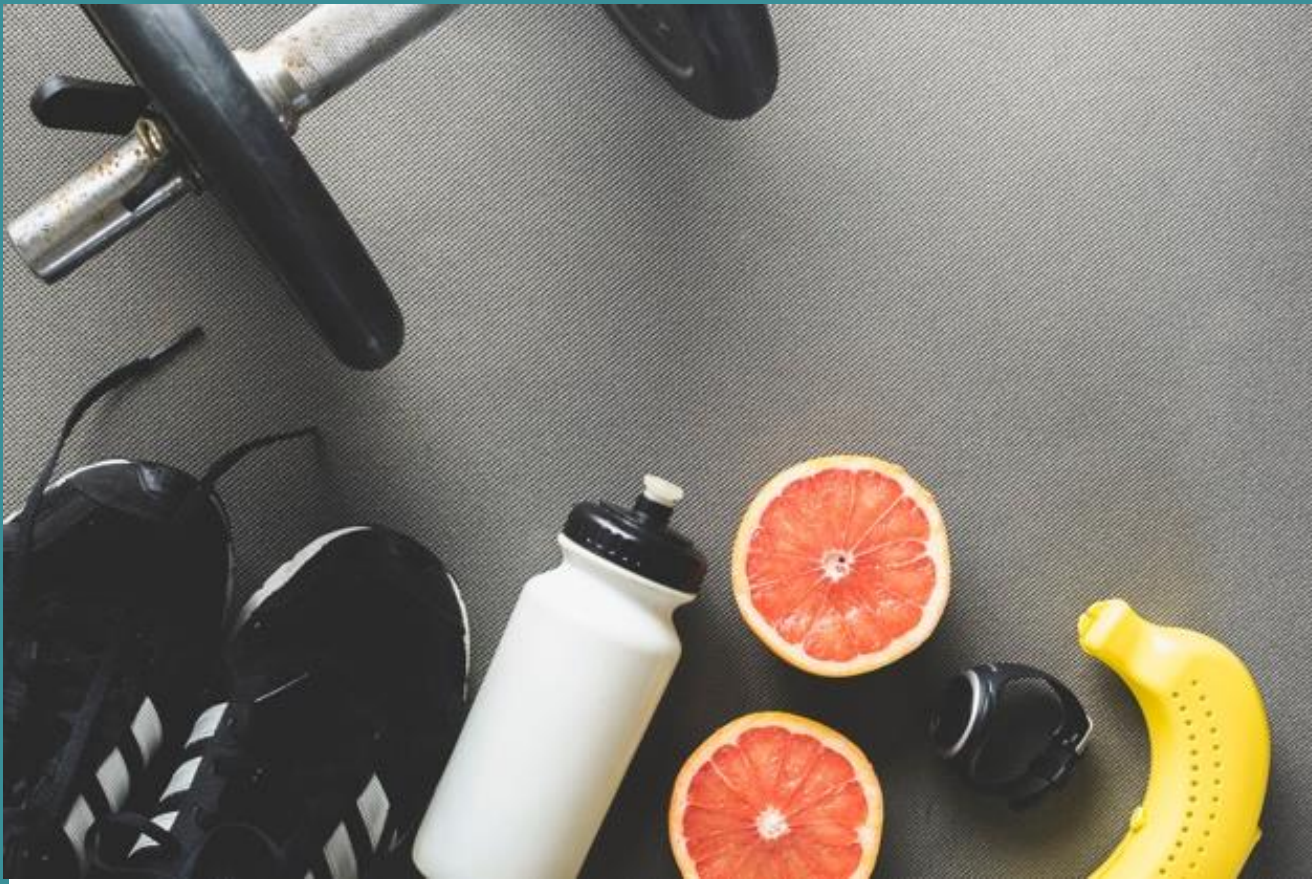
Consumers want to break from plain chocolate and vanilla flavours that are typical in sports nutrition products and seek healthy products resembling desserts, bakery, and confectionary with richer flavours and textures.

Protein cookies with chocolate chip flavour, which are low sugar and high protein, thus perfect for a **fitness-friendly indulgence** (**Spain**).

The emergence of indulgence in sports nutrition is linked to the trend that the increasing number of active consumers follow high-protein & low-carb diets which can be very restrictive such as the keto diet. Thus, having tastier, more indulgent protein snacks to compensate for “carb-cravings" is a great compromise for these consumers.

High protein, low sugar, lacto-vegetarian and convenient **indulgence** bars with several flavours such as Belgian chocolate with caramel or hazelnut, caramel with white chocolate, or birthday cake flavoured (**United Kingdom**).

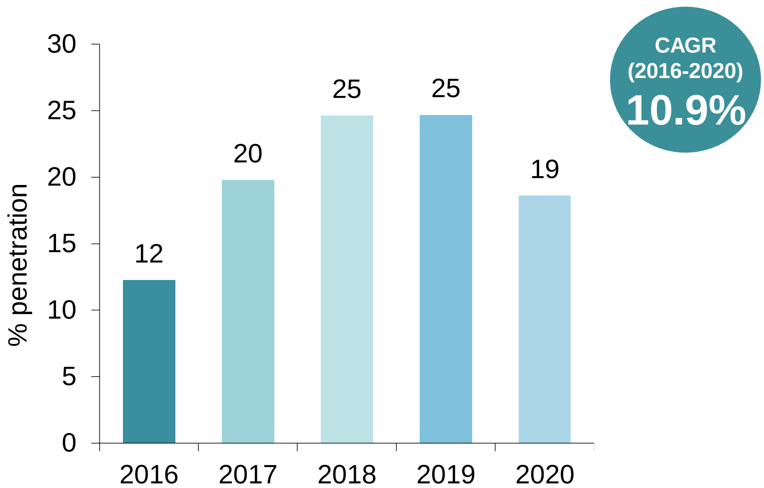
5. Categories



5.1 Sports Bars

Sports bars is a category with a strong growth of 10.9% despite the decrease in the development of new products in 2020. It is the second most popular category in sports nutrition products in Europe, and its Market penetration is overall high in all AHFES countries. Its comfortable on the go nature satisfies the global consumer demand for convenience products.

Sport bars launches in AHFES countries (2016-2020)



Apricot and almonds protein bar **(France)**.

The main health claim used in this category is *High/Source of protein*, but a wide range of other health claims are present in sports bar products among which several stand up such as *High/Source of fiber*, *Low sugar* or *Energy/Alertness*. Many health claims presented a growth in almost all AHFES countries in the period 2016-2020 including *High/Source of protein,* which is growing in all AHFES countries but United Kingdom, *High/Source of fiber*, which is growing in Spain, France and Ireland, *Low sugar*, which is growing in all AHFES countries but Portugal, or *Gluten free*, which is growing in all countries.

Top 10 Health Claims by country (2016-2020)

Region	1. High/ Source of protein	2. High/ Source of fiber	3. Low sugar	4. Energy/ Alertness	5. Gluten Free	6. No added sugar	7. No Additives/ Preservatives	8. Natural	9. Organic	10. Low/No/ Reduced carbs
Spain	69%*	39%*	33%*	41%*	22%*	15%*	8%*	14%	10%*	
Portugal	91%*	50%	36%	30%	15%*	15%*	16%*		16%*	
France	69%*	38%*	25%*	39%	26%*	15%*	13%	13%	16%*	11%
United Kingdom	89%	36%	37%*	27%	27%	15%*	11%	18%*		9%
Ireland	94%*	28%*	50%*	15%*	15%*	14%*			6%	8%*
EUROPE	84%*	38%*	34%*	27%	22%*	16%*	12%*	9%		

*growing trend
Colour code highlighting Top 1-3 health claims: #1 #2 #3
Percentages indicate the % of new products carrying the claim

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High/Source of protein is the main claim and is growing generally

Caramel flavour bar with **over 20 g of protein** **(Ireland)**.

Chocolate flavoured bar with **36% of protein** **(Spain)**.

High/Source of fiber is a well positioned claim

Banana endurance bar **high in fiber** **(United Kingdom)**.

Low sugar is a popular claim, and *No added sugar* grows in all AHFES countries as well as Europe

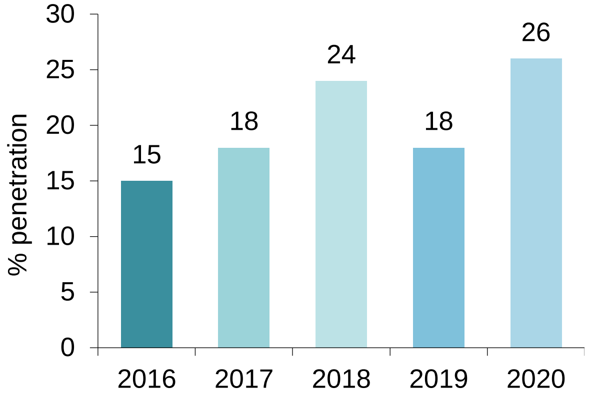
Salted chocolate **low sugar** bar **(Portugal)**.

Bar with cherry, almonds and hibiscus **with no added sugar** **(France)**.

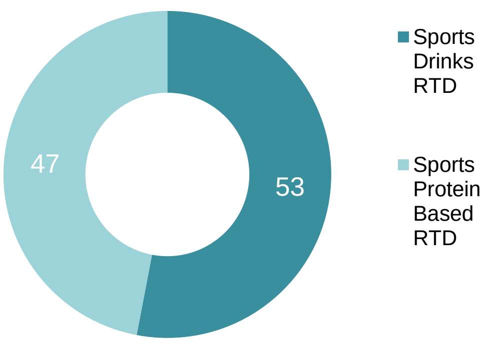
5.2 Sports Drinks

Sports drinks, including protein-based sports drinks, is also a growing category, which presents a CGAR of 14.9%. In 2019 there was a decline in new product development compared to the previous year but in 2020 reached its highest market penetration within the period 2016-2020 to continue the growing trend that had started in 2016.

Sport drinks launches in AHFES countries (2016-2020)



CAGR (2016-2020) 14.9%



Isotonic sports drink **(France)**.

The top health claim for sports drinks are *High/Source of protein*, *Energy/Alertness* and *Low/No/Reduced fat,* which is growing in almost all AHFES countries. Other remarkable growing claims are *No Additives/preservatives*, which is growing in all AHFES countries and *Sugar Free*, growing globally except in Portugal.

Top 10 Health Claims by country (2016-2020)

Region	1. High/ Source of protein	2. Energy/ Alertness	3. Low/No/ Reduced fat	4. No Additives/ Preservatives	5. Sugar free	6. Gluten Free	7. No added sugar	8. Low/No/ Reduced calories	9. Low/No/ Reduced carbohydrates	10. Vitamin/ Mineral fortified
Spain	39%*	31%	33%*	18%*	17%*	26%*	16%*	31%		11%
Portugal	80%*	16%*	73%*	27%*	24%	41%	24%	18%*	12%	
France	49%*	42%	35%*	20%*	20%*		22%		17%	
United Kingdom	53%	41%*	33%	26%*	32%*	13%*	21%	23%	12%	17%
Ireland	49%*	31%*	42%*	14%*	20%*	20%		16%*	15%	14%
EUROPE	50%*	29%*	36%*	17%*	25%*	21%*	22%*	23%*	14%	

*growing trend
Colour code highlighting Top 1-3 health claims #1 #2 #3
Percentages indicate the % of new products carrying the claim

High/Source of protein is the main claim

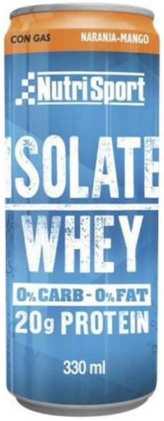
No additives/preservatives is growing in all AHFES countries

Caramel flavour protein shake **with 50 g of protein** **(Portugal)**.

Mango orange flavour flavour protein shake **with 50 g of protein** **(France)**.

Vanilla flavour shake **with no artificial additives** **(United Kingdom)**.

Energy/Alertness and *Low/No/Reduced* fat are popular claims



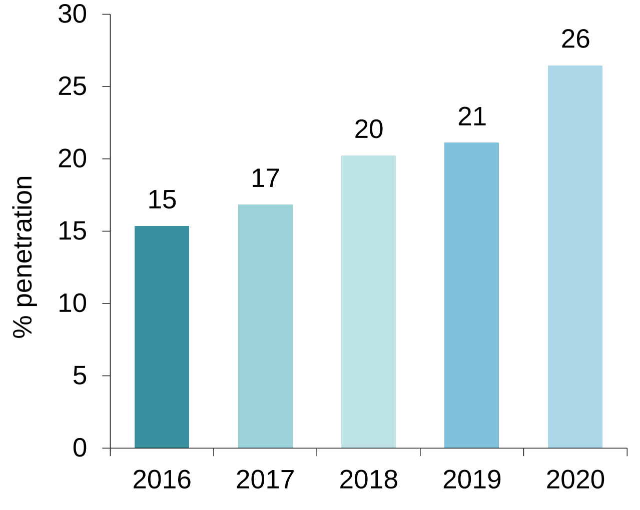
Workout drink with **0% fat** **(Spain)**.

Pre-workout drink **providing an immediate energy boost** **(Ireland)**.

5.3 Sports Powders

Sports powders is the category with the development of more products in Europe and represent a growth in AHFES countries of 14.6%. It is a category with a stable growth since 2016, reaching its peak of new product development in 2020.

Sports powders launches in AHFES countries (2016-2020)



CAGR (2016-2020)
14.6%

Protein Powder With Grape flavour **(United Kingdom)**.

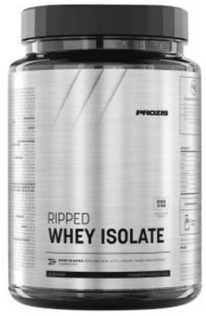
The main health claims are *High/Source of protein*, *Energy/Alertness* and *Gluten free,* the latter growing in all AHFES countries. Similarly, *High/Source of* protein, and *Energy/Alertness* are growing globally except for France. Other prominent growing trends are *Sugar free* and *Low/No/Reduced fat*, growing globally.

Top 10 Health Claims by country (2016-2020)

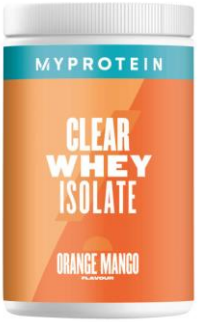
Region	1. High/ Source of protein	2. Energy/ Alertness	3. Gluten Free	4. No Additives/ Preservatives	5. Sugar free	6. Low/No/Reduced fat	7. Low/No/ Reduced carbs	8. Immune Health	9. Weigh management	10. Brain health
Spain	44%	37%*	28%*	12%*	13%*	13%*		13%*		11%*
Portugal	45%*	24%*	27%*	16%*	18%*	12%*		14%*	10%*	14%*
France	57%	37%	32%*	31%	13%	18%	13%	14%	13%*	
United Kingdom	57%*	35%*	27%*	15%	14%*	19%*	12%*		14%*	
Ireland	44%*	35%*	27%*	19%*	11%*	19%*	14%*	21%*		14%*
EUROPE	53%*	32%*	28%*	19%*	14%*	19%*	14%*	13%*	12%*	

*growing trend
Colour code highlighting Top 1-3 health claims #1 #2 #3
Percentages indicate the % of new products carrying the claim

High/source of protein is the most popular claim



Whey Isolate Powder With Strawberry-Banana flavour **containing 82 g of whey protein** **(Portugal)**.



Whey Isolate With Orange Mango **containing 20 g of protein** **(Spain)**.

Performance Protein Powder With Chocolate flavour **containing 25 g of whey protein** **(United Kingdom)**.

Gluten free is growing in all AHFES countries and Europe

Gluten free shake powder with strawberry flavour **(France)**.

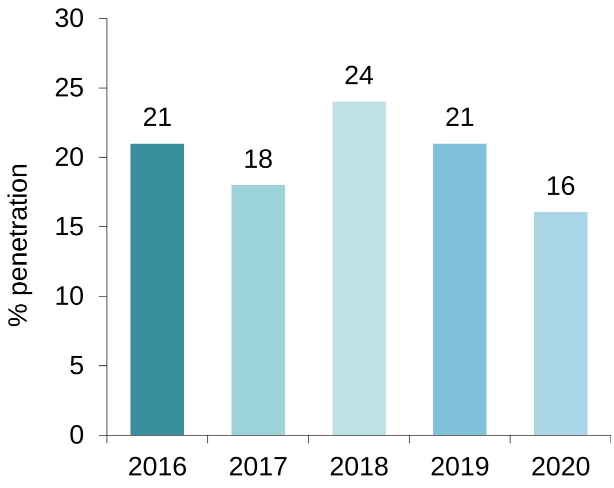
Strong presence of *Energy/Alertness*

Recovery Powder **with vitamin B12 that contributes to normal energy-yielding metabolism** **(Ireland)**.

5.6. Sports Supplements

Sport supplements is a category with a negative growth. This category reached the peak of new product development in 2018 and since then the number of new products declined yearly.

Sports supplements launches in AHFES countries (2016-2020)



CAGR (2016-2020)
-6.1%

Curcumin food supplement **with turmeric, green tea and green coffee that reduces joint discomfort, and combat oxidative stress of sports** **(Spain)**.

Energy/Stamina is the main claim among sports supplements, followed by *Health/Wellness* and *Immune Health*. Despite the negative growth of this category, there are health claims growing in several countries. In Spain, claims such as *Health/Wellness*, *Immune Health, Brain health, Bone health* or *Heart health. Immune Health* and *Health/Wellness* are claims also growing in Portugal, and the latter is growing also in Ireland, where *Brain health* is also growing, similarly to United Kingdom. In this country *Heart health* is a growing claim among sports supplements.

Top 10 Health Claims by country (2016-2020)

Region	1. Energy & Stamina	2. Health/ Wellness	3. Immune Health	4. Brain/Mood Health	5. Weight Management	6. Bone Health	7. Heart Health	8. Skin Health	9. Joint Health	10. Oral Health
Spain	39%*	27%*	19%*	19%*	9%	13%	14%*	9%*	9%*	5%*
Portugal	44%*	33%*	18%*	14%	14%*	19%*		5%*	9%	12%
France	46%	29%	18%	15%	14%	11%	6%		7%	6%
United Kingdom	46%	20%	16%	18%*	26%	10%	10%*		6%	
Ireland	30%	30%*	24%	11%*	8%*	10%	10%	8%	10%	
EUROPE	43%	27%	20%	16%	14%	13%	10%	8%	7%	6%

*growing trend
Colour code highlighting Top 1-3 health claims: #1 #2 #3
Percentages indicate the % of new products carrying the claim

Energy/Stamina is the *main claim*

Supplement containing beetroot extract providing an increase in plasma nitrate during physical exerices and vitamin B12 **(United Kingdom)**.

Pre-workout capsules of caffeine plus theanine inducing reinvigorating feelings **(Ireland)**.

Health/Wellness, widely present

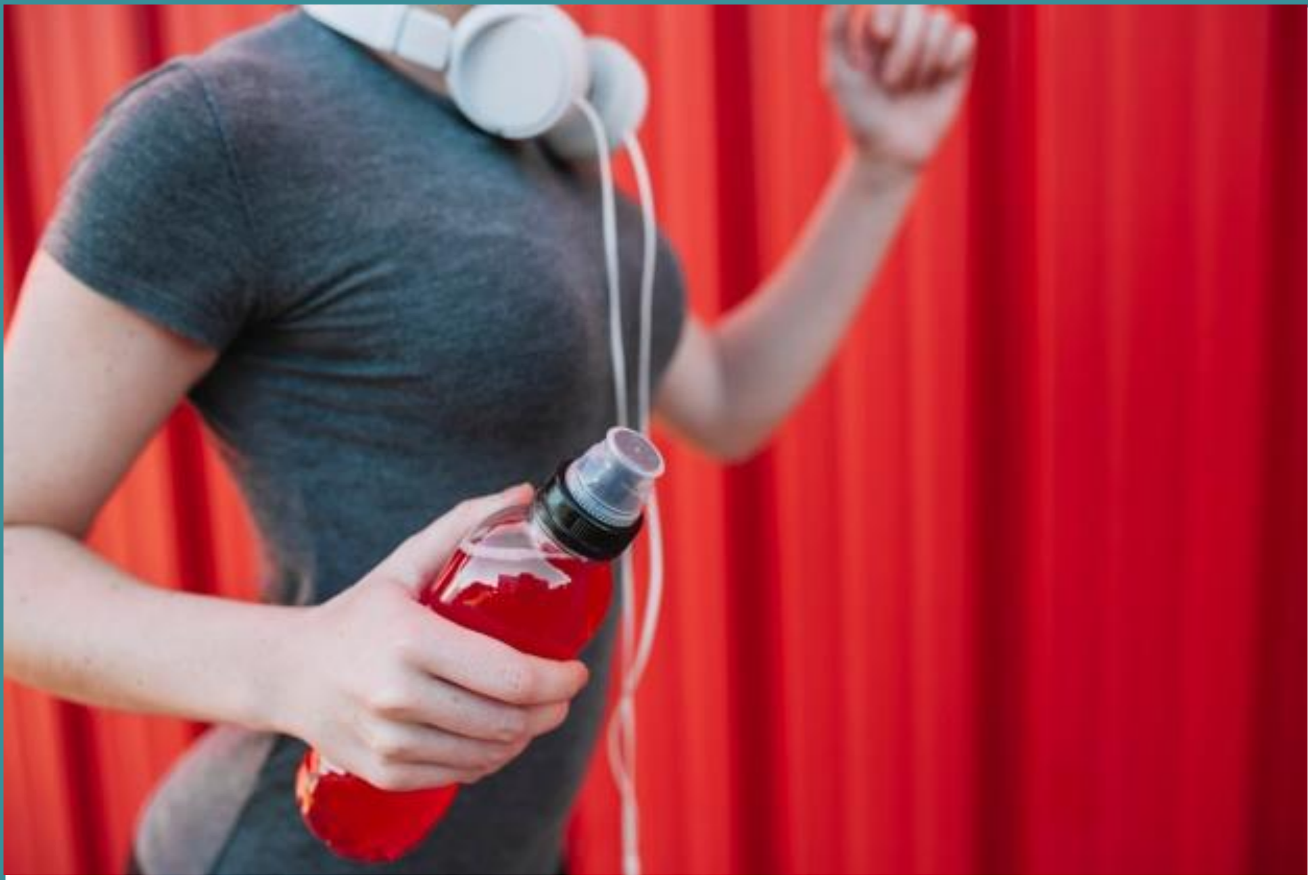
Immune Health is used regularly

Food Supplement with vitamins and selenium for endurance athletes **(France)**.

Vitamin C Bioflavonoids Complex that contributes to the normal functioning of the immune system **(Portugal)**.

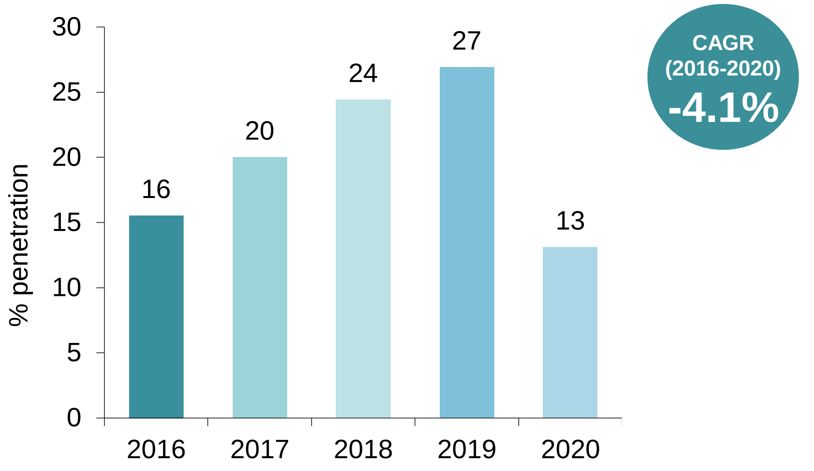
Zinc And Magnesium Dietary Supplement for the normal function of the immune system and maintenance of bones and health **(Spain)**.

5.6. Other Sports Nutrition Products



Other sports nutrition products which include energy snacks and bites, cookies, pouches, energy gels, powdered cereals or powdered flours for baking, among others. This category represents a negative growth resulting from the very low development of new products in 2020 compared to the previous years, probably affected by the pandemic. Until 2020, the category presented a growing tendency.

Other Sports Nutrition Products launches in AHFES countries (2016-2020)



High Protein Pouch With Strawberry And Key Lime Pie flavour **(United Kingdom)**.

The main claims are *High/Source of protein*, which is growing in France, United Kingdom and Ireland, and *Energy/Alertness*, which is growing in Spain and Ireland. Other popular trends are *High/Source of fiber*, which is growing in France, United Kingdom and Ireland, *Gluten free*, which is growing in Portugal and United Kingdom, and *No Additives/preservatives*, which is growing in Portugal, France and Ireland.

Top 10 Health Claims by country (2016-2020)

Region	1. High/Source of protein	2. Energy/ Alertness	3. High/ Source of fiber	4. Gluten free	5. No Additives/ preservatives	6. Low/No/ Reduced carbs	7. Low sugar	8. Low/No/ Reduced calories	9. No added sugar	10. Organic
Spain	51%	51%*	23%	30%		31%*	12%*			
Portugal	59%	70%	49%	17%*	30%*					17%*
France	35%*	57%	20%*	34%	32%*	10%		11%	11%	15%*
United Kingdom	49%*	52%	21%*	24%*	27%	12%	17%*	12%	12%	
Ireland	72%*	45%*	41%*	24%	30%*		23%*			10%
EUROPE	54%*	45%	26%*	27%*	29%*	10%	19%*	13%	10%*	

*growing trend
Colour code highlighting Top 1-3 health claims #1 #2 #3
Percentages indicate the % of new products carrying the claim

High/Source of protein and *Energy/Alertness* lead the claims for sports supplements

Performance **energy snack bites** with peanut butter flavour **(Ireland)**.

Pouch of peanut butter **to keep your training on track** **(United Kingdom)**.

Organic **energy balls** with salted butter caramel **(Spain)**.

No additives/preservatives is a widely used claim

Sports nutrition protein food popular among sports people **free from preservatives** **(Portugal)**.

High/Source of fiber is a recurrent claim

Sports nutrition protein food **source of fiber** **(France)**.

6. Conclusions

The sports nutrition market is growing, and it is predicted that this tendency will continue especially in Europe, which is forecasted to be the region witnessing the fastest growth in the upcoming years. The rising awareness of consumers towards healthier lifestyles has boosted the demand for sports nutrition products.

Sport powders is the category with most product development, followed by sport bars, and both segments are growing. Overall, the two most popular health claims are *High/Source of protein* and *Energy/Alertness,* and there is a clear presence of convenience formats to go. The growth of plant-based options is also noteworthy, responding to a higher concern about sustainability. Remarkably, there is a growing presence of passive health claims such as *No added sugar*, *Low sugar* and *Gluten free* as well as other claims such as *High/Source of fibre*, reflecting the awareness of consumers for better and individualised health and directly related to addressing or preventing non communicable diseases such as obesity or diabetes, or caring for gut health. There is also a trend for reinforcing the immune system especially among sports supplements to address the growing demand by consumers. Ingredients such as turmeric, or theanine, and the supplementation with vitamins and minerals is common, particularly in this category.

Among AHFES countries, United Kingdom and France lead the development of new products, although they differ slightly in the categories with more innovative products. In United Kingdom Sports drinks is the leading category, whereas sports powders is the lead category in France. These two categories are widely present in the new products in the other AHFES countries. Sports bars is a category with a notable number of new products in all AHFES countries. This category, along with Sports drinks and Sports powders experienced a continuous growth in the period 2016-2020. Other sports products such as pouches or energy snacks suffered a drop in terms of new products in 2020 but until then this category showed a clear growing trend. With respect to the brands, branded products cover almost all the market. However, private labels show a strong growth.

To sum up, sports nutrition is category that is evolving to offer new products to a wider range of consumers, which possess more information about how to improve their health and are more aware about sustainability. The opportunities for innovation encompass the reduction of sugar, the increase of plant-based sources of quality protein and fibre, the use of functional ingredients, and the improvement of taste to elaborate healthy and attractive sports for all sort of audiences.

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