



WHAT'S SUPP?

The Path To Performance

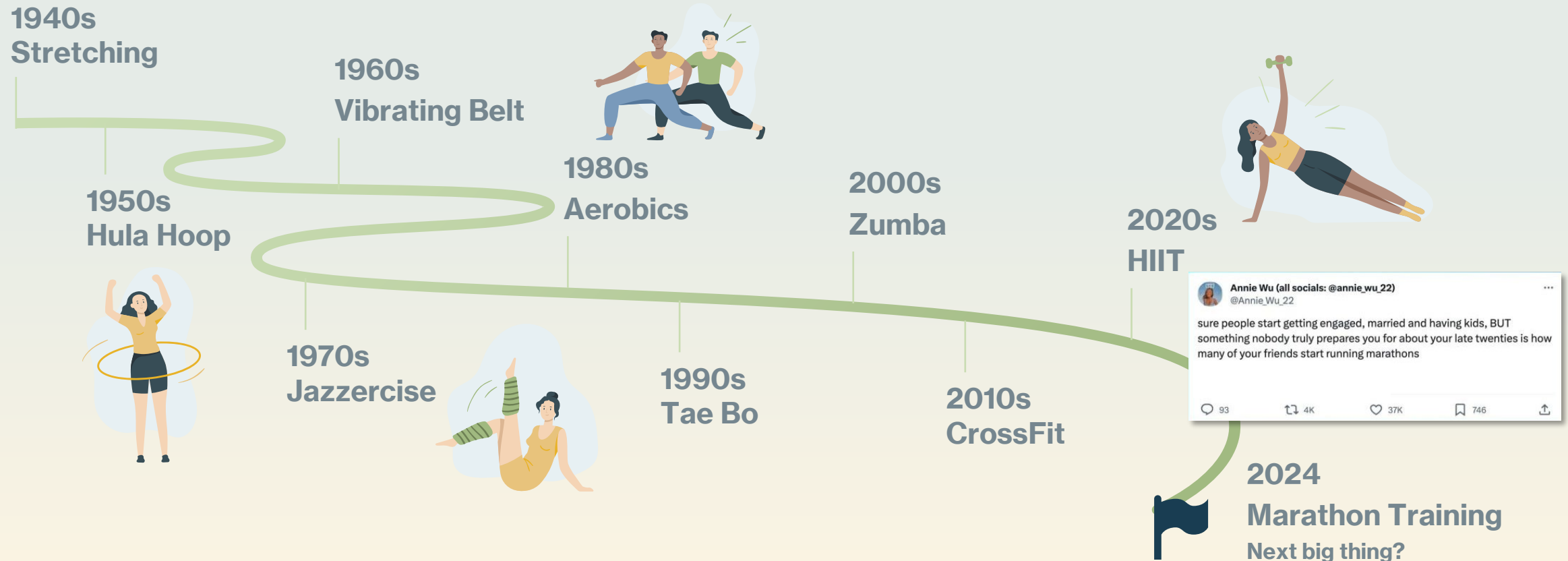
EDITION 4 – 2024





The Evolution of Exercise

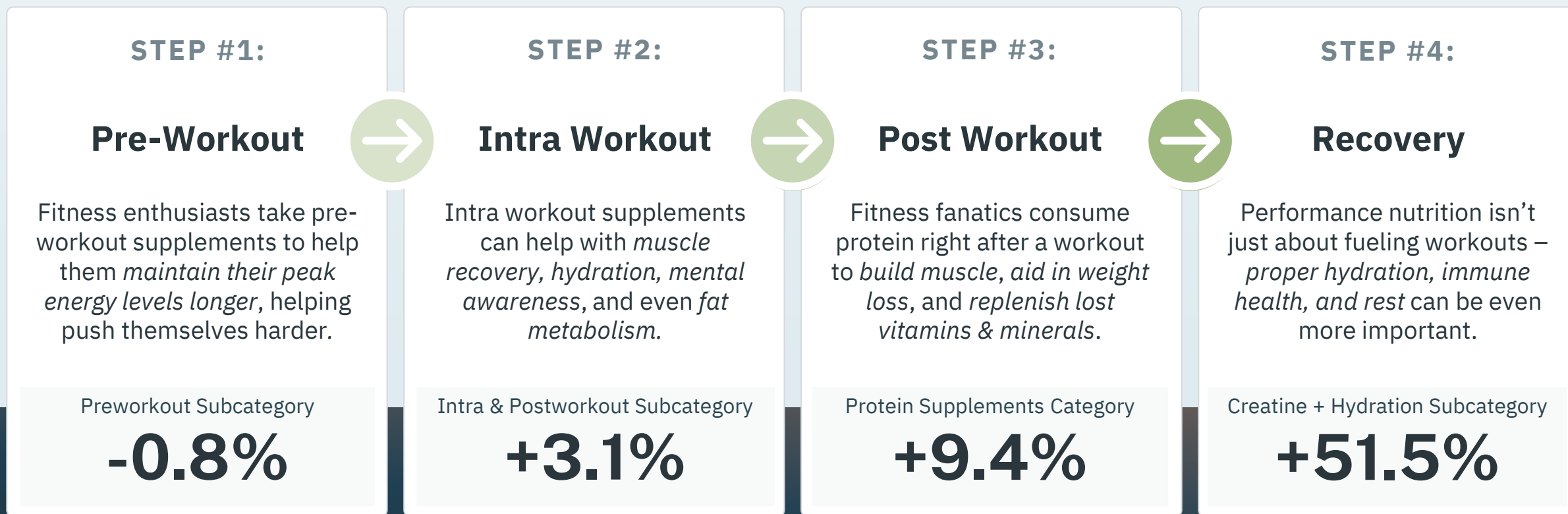
A record number of Americans participated in at least one fitness or sports activity in 2023 (80%). As participation evolves, the exercise of choice has as well – **most recently with high intensity activities taking the forefront.**





Emergence of the Fitness Supplement Routine

As fitness culture has taken off, so too has the endless search for how to get the most out of a workout. Queue the **multi-step approach to powering an effective sweat session.**

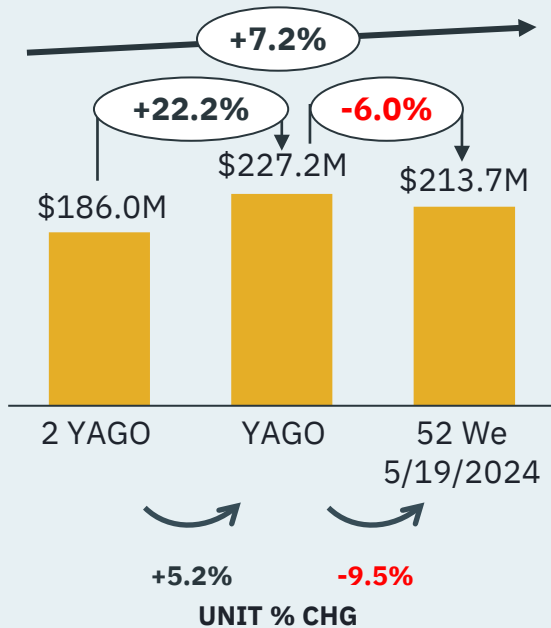




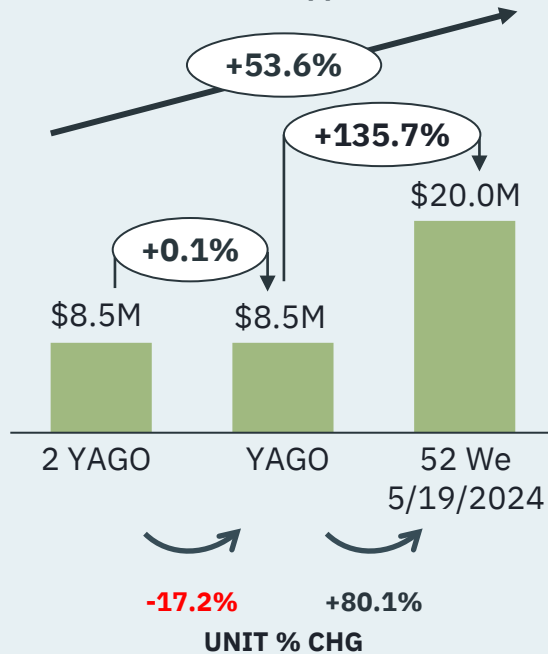
JAIME

Pre-workout: Natural Buzz Takes Center Stage

SPECIALTY & WELLNESS
POSITIONING GROUP
Sales Volume Growth of
Preworkout Supplements



NATURAL
POSITIONING GROUP
Sales Volume Growth of
Preworkout Supplements



Pre-workout supplements, also known as "pre-workout", are dietary **formulas that are intended to improve athletic performance and boost energy levels before exercise**. They are designed to delay the onset of fatigue and improve fitness performance.

There is a growing market for **natural pre-workout supplements**, according to the data. **Consumers are gravitating towards naturally positioned products** likely due to worries about the possible negative effects of conventional stimulants.

These functional ingredients improve focus and energy levels without giving users the jitters or crash that come with certain stimulants. In addition to appealing to consumers who are health-conscious, **this trend offers the chance to capitalize on the expanding market for natural and organic products**

The data indicates a move away from more conventional pre-workouts. These days, **consumers are looking for multifunctional blends that maximize performance in a variety of areas, such as cognitive function, muscle recovery, endurance, and focus.**

Pre-workout: Natural Buzz Takes Center Stage

So, what are some of the fastest-growing naturally positioned functional ingredients, according to the data?

Tyrosine

Dol % Chg	Unit % Chg
+288.2%	+218.4%

L-tyrosine is often included in pre-workout supplements to **help with focus and concentration**. Making you able to “keep your head in the game”



Taurine

Dol % Chg	Unit % Chg
+220.4%	+135.9%

Taurine is an amino acid that provides several benefits like **improved endurance, reduced muscle damage, and improved recovery**



Caffeine

Dol % Chg	Unit % Chg
+183.1%	+106.9%

Caffeine has been shown to **increase muscle strength and output** during exercise while **reducing fatigue**. Multifunctional natural blends help to offset any potential jitters



Arginine

Dol % Chg	Unit % Chg
+3.5%	+9.5%

Arginine helps to increase the Nitric Oxide levels in the body which helps to **improve muscle pump, higher workout performance, improve endurance**, and helps in **muscle recovery**





RAHUL

Intra-Workout: Mid-Workout Endurance Enhancers

Like pre-workouts, intra-workout supplements can boost energy and alleviate fatigue, giving you the extra push needed to complete your entire workout.

Intra-Workout Categories & Representative Subcategories



Condition Specific Supp. Formulas	Other Supplements	Performance Nutrition
Cognitive Health Supplements Energy Supplements Heart & Circulation Supplements	Amino Acids	Creatine Hydration & Electrolyte Intra & Post-workout



Superfood & Whole Food Supp.	Wellness Bars & Gels	Shelf Stable Juices
Superfruit & Juice Concentrates	Bars Wellness Energy Gels & Snacks	SS Coconut & Plant Water SS Juice Concentrates



Energy & Sports Drinks	Shelf Stable Fruits & Vegetables	Vitamins & Minerals
Energy Drinks Sports & Rehydration Drinks	SS Fruits	Vitamin C Vitamin E

Conquering the Last Mile

Intra-workout supplements, like pre-workouts, contain ingredients like amino acids, creatine, and **carbohydrates** aimed at **enhancing performance during exercise**, helping you push through that last stretch.

These supplements may increase athletic performance by fueling body processes, such as **replenishing ATP stores with creatine and carbohydrates** in the form of energy gels and carb sources like glucose and improving **muscle hydration and lactic acid buffering** with amino acids like Betaine and Beta-Alanine.

Nootropics and B-complex vitamins may **boost mental focus and energy**, while caffeine and L-Carnitine may enhance **fat metabolism**. Essential Amino Acids (EAAs), including L-Lysine and L-Threonine, **help support muscle growth**, while antioxidants and electrolytes (like Magnesium, Potassium, and Sodium) **aid in recovery and hydration**.¹

Intra-Workout: Functionality For The Final Push

While primarily focusing on carbohydrate supplementation, various functional ingredients in foods and drinks can help alleviate mid-workout fatigue.

Branched Chain Amino Acids (BCAA's)

+2.9% | **+2.1%**
Dol % Chg | Unit % Chg

Multi-Minerals (Hydration)

+55.4% | **+41.5%**
Dol % Chg | Unit % Chg

Intra-Workout Food



Energy Gels & Snacks
(Supplemental Carb)



Superfruit & Concentrates
(Beet Root)



SS Fruits
(Whole Food Concentrate)

Energy gels and shelf-stable fruit pouches are excellent **carbohydrate sources**, utilizing sugar as their base. Consume these based on your fatigue level.

Beetroot, rich in nitrates, converts to nitric oxide, which aids in **improving blood pressure and circulation**.

Beet Root

+86.5% | **+66.8%**
Dol % Chg | Unit % Chg

Green Teas & Supplements

+32.6% | **+45.2%**
Dol % Chg | Unit % Chg

Supplemental Carb Source (Bars & Drinks)

+24.5% | **+5.1%**
Dol % Chg | Unit % Chg

Acetyl L-Carnitine

+75.0% | **+147.5%**
Dol % Chg | Unit % Chg

Intra-Workout Drinks



Sports & Rehydration
(Multi-Minerals)



Hydration & Electrolytes
(Multi-Minerals)



Intra & Post Workout
(BCAA's)

Hydration during workouts is essential for **maintaining** performance, **regulating** body temperature, **supporting** cardiovascular function, mental focus and cognitive function.

BCAA's promote muscle preservation and aid in **recovery**. Some BCAA supplements also contain electrolytes, so its just not for post-workouts!

Antioxidant Combo Of A C & E

+4.6% | **+11.1%**
Dol % Chg | Unit % Chg

Vitamin B12

+21.4% | **+11.0%**
Dol % Chg | Unit % Chg

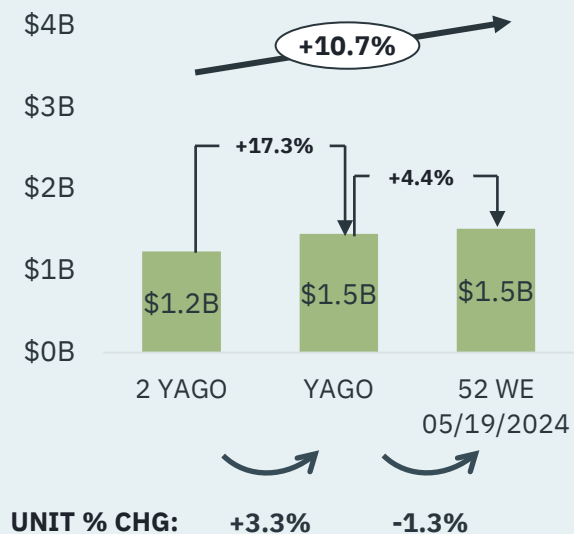


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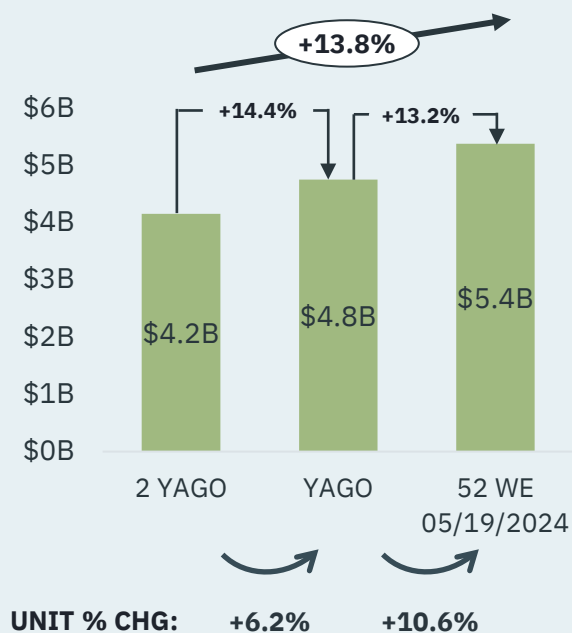
Post-Workout: Protein As The Ultimate Replenishment

With more than half¹ of the general population declaring that they seek out high-protein foods, it's no wonder the sales boom in Protein Supplements.

Sales Volume Growth of Protein & Meal Replacement Powder



Sales Volume Growth of Protein & Meal Replacement Liquid



Gone are the days of protein powders and shakes being reserved solely for body builders and elite athletes. The average gym goer is now learning more about the importance of consuming protein after a workout as it can **help build muscle, aid in weight loss, & replenish key nutrients**. And this increased knowledge shows in the data!

In Brick & Mortar, both liquid and powder protein have seen double digit growth over the last 3 years. However, in the latest 52 weeks, liquid protein sales have far outpaced their powder counterpart, suggesting **shoppers are more likely to purchase a grab-and-go option in store**.

On Amazon, the protein craze continues! Both liquid and powder protein has seen strong dollar growth in the last year (+11% for both forms). Protein powder's heightened rise on Amazon suggests **shoppers may be switching to an online platform to purchase in bulk or larger sizes**.

In general, consumer interest in protein remains high as customers gravitate towards high protein products beyond supplements but also in snacks and other beverages...

Post-Workout: Beyond The Classic Protein Shake

Some consumers might be turning to other products to get their daily protein after their workout

PROTEIN BEVERAGES



PROTEIN SNACKS



Though protein powder and liquids continue to be a mainstay in the athletic community, **other high protein products are gaining popularity**. Protein beverages are nothing new, but perhaps some consumers are realizing that drinking two or more protein shakes a day to hit your macros isn't for everyone. Given the heaviness of a shake, **these protein beverages/protein water could be a more pleasant, lighter experience for some**.

Plant protein still isn't heavily represented in the beverage space perhaps due to stability or flavor issues but given how well plant protein and even collagen does in the traditional powder and liquid space, **their success could transfer over as well**.

In the same vein, some consumers are **turning to snacks that can deliver anywhere from 10g to >20g of protein per serving**. This helps add variety to the protein market that is still dominated by both protein powder and liquids. Though it might not become the main way athletes get their protein, it's still an opportunity to meet them in the middle, and also introduce more casual athletes who aren't necessarily in the protein shake world.

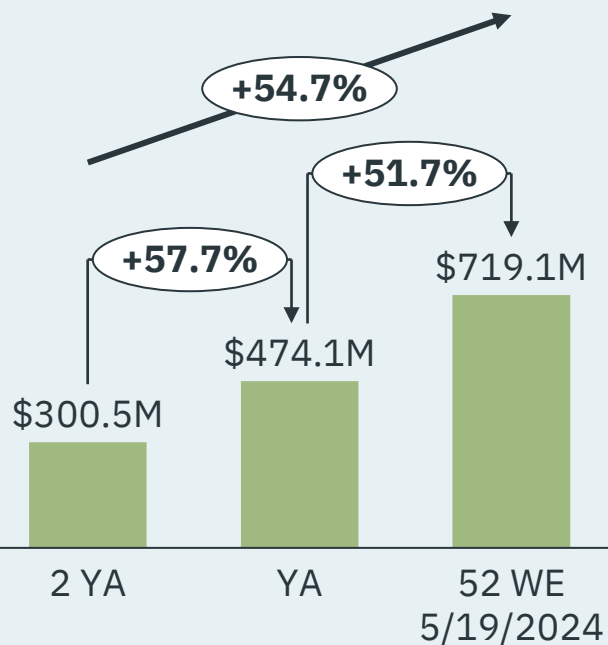


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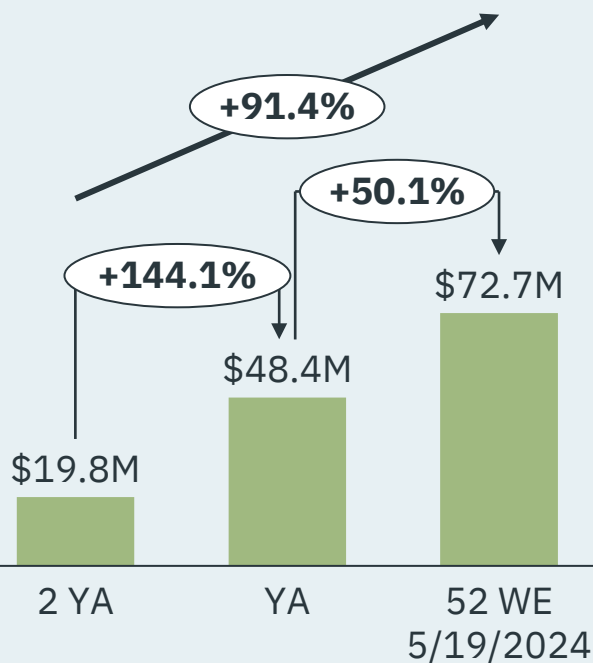
General Recovery & Wellness: Consistency Is Key

Performance isn't solely determined by what you do during your workouts. How you take care of your mind and body the rest of the day can be even more important!

Sales Volume Growth of Hydration & Electrolyte Subcategory



Sales Volume Growth of Creatine



HYDRATION & ELECTROLYTES

Hydration is key to performance – but it's an all-day every-day habit that can be hard to stay on top of. Athletes who lose more electrolytes through exercise benefit from hydration supplements to **balance their bodies' sodium, potassium, & magnesium levels.**

CREATINE

The compound amino acid is versatile in that it can be taken pre-, intra-, or post-workout as long as consumption is consistent. Its **brain health & energy benefits** help keep you dialed in throughout your workout regimen. Runners specifically rely on creatine to **improve endurance capacity & glycogen storage.**

General Recovery & Wellness: Consistency Is Key

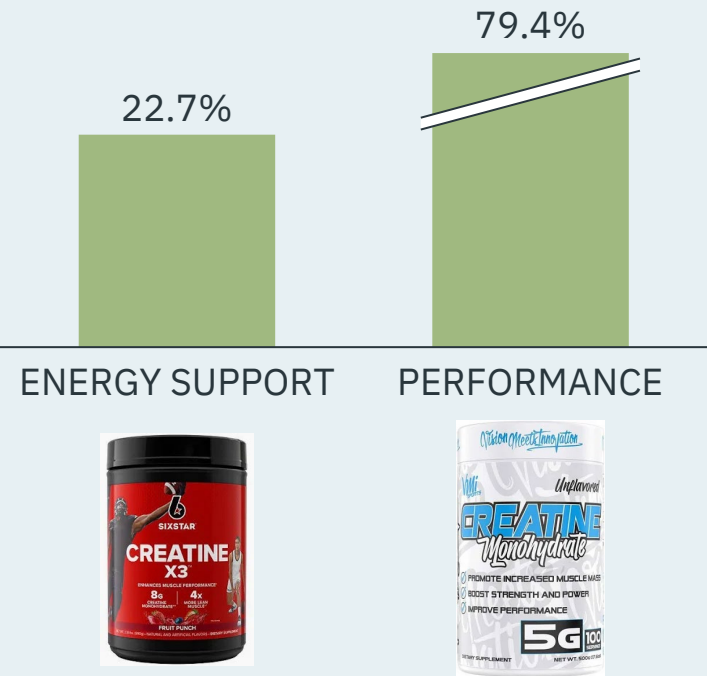
Both subcategories have evolved to meet targeted consumer needs, all health focuses seeing double-digit growth

Health Focus Dollar % CYA

HYDRATION & ELECTROLYTES



CREATINE



Summary of Findings

Fitness culture is alive and well, and with it has come a renewed interest in Performance Nutrition. Due to social media, shoppers are more informed than ever on products to help them power through a tough sweat session.

Brands looking to win in the space should consider:

Occasion – when will buyers consume your product?

Ingredients – will they help athletes stay on track?

Education – why do shoppers need your product?

Trends – how is your target demographic exercising?

The popularity of the multi-step fitness supplement routine offers brands a chance to capture multiple usage occasions – capitalize on the trend and grow a loyal customer base!



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We empower VMS brands to identify consumer trends, fuel innovation, and drive growth by delivering a common language built on:

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