



Sports & Active Nutrition



Active Lifestyle Nutrition: “Sports Nutrition”



Scott Dicker

Sr. Director, Market Insights

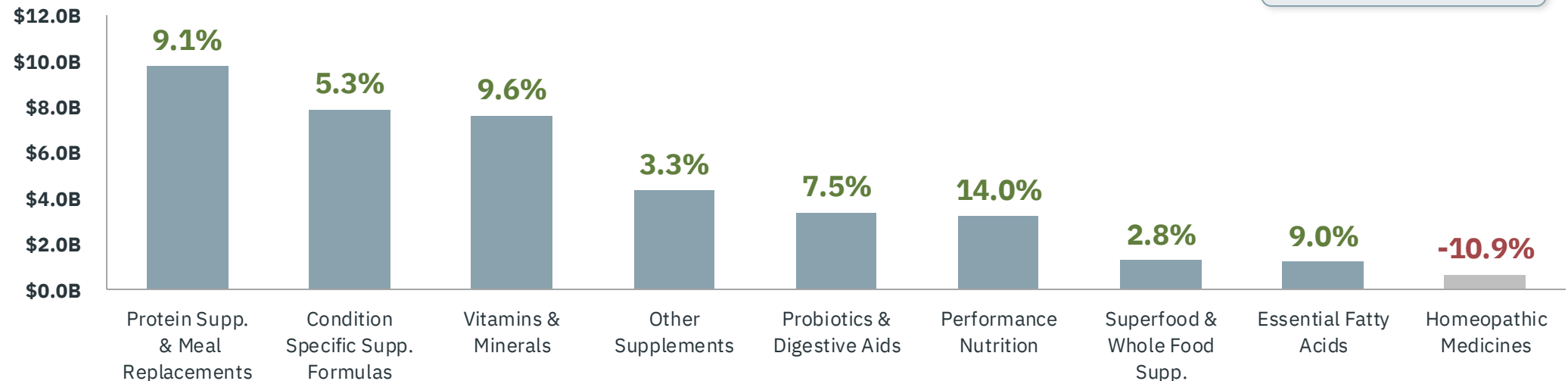




Shoppers are prioritizing holistic and fitness-oriented supplements that enhance physical performance, provide natural and nutrient-dense options, and support muscle development.

Vitamins & Supplements By Category

Dollar Sales, Dol % Chg



+7.4%

VMS Total Department
52 Week \$ Sales Change YoY

Units % Chg, YAGO:

+8%

-3%

+3%

+0%

+4%

+15%

+2%

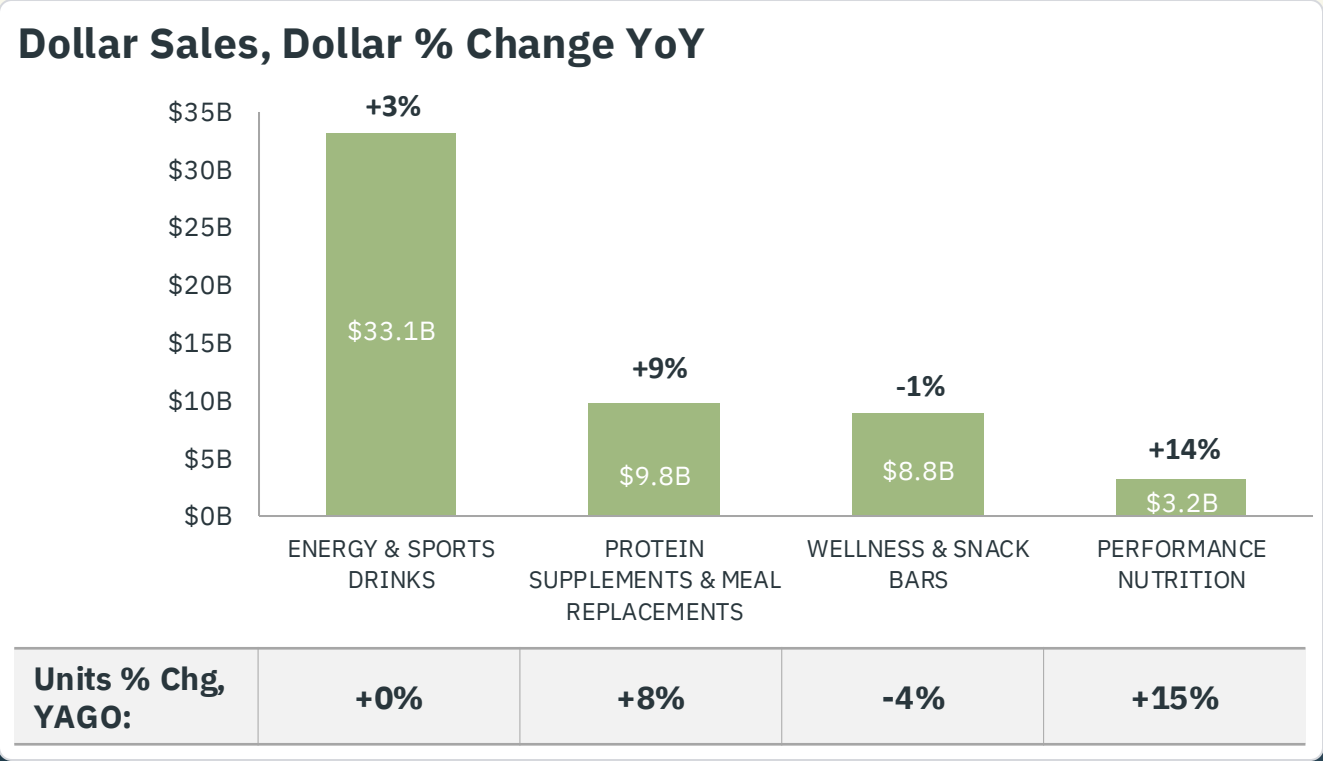
+1%

-14%

* % Represents % Change YoY (vs same time LY)



Sports Nutrition categories like Performance Nutrition reported double digit growth



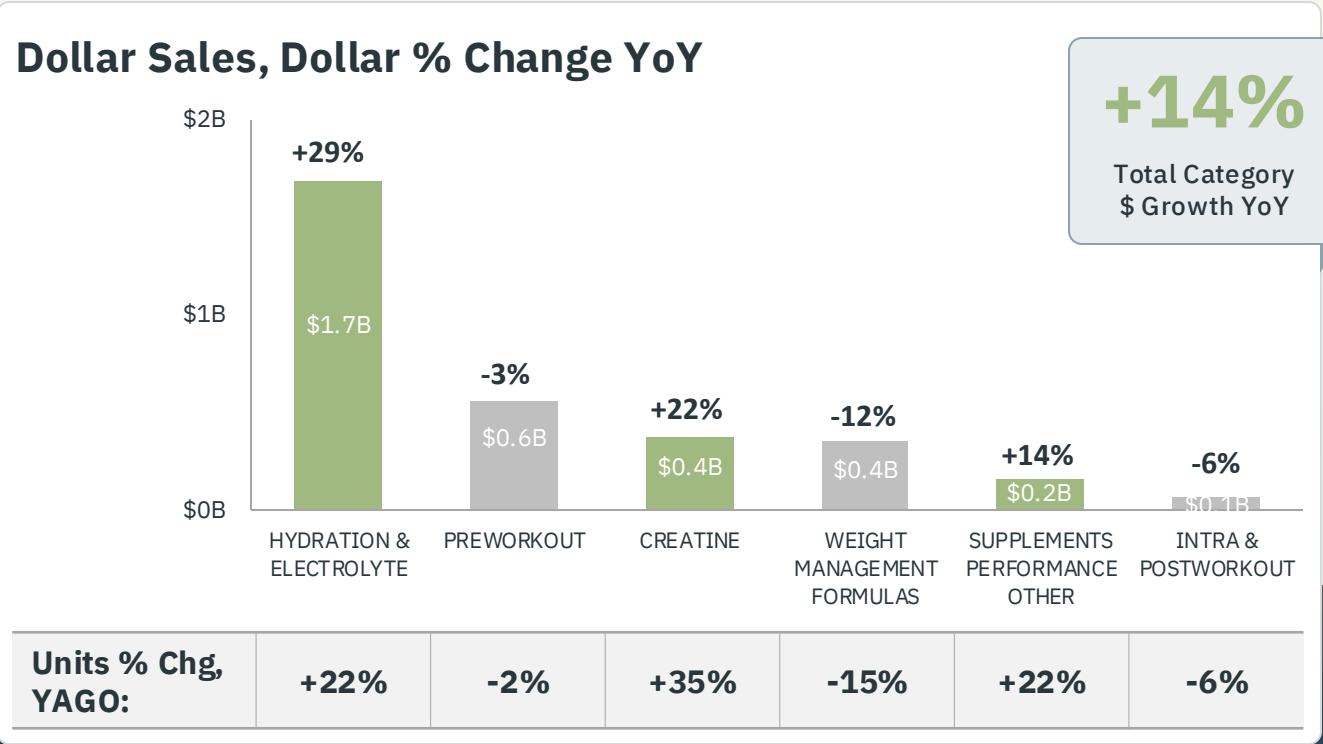
* % Represents Dollar % Change YoY (vs same time LY)





Performance Nutrition category growth driven by Creatine and Hydration & Electrolyte

Performance Nutrition Subcategory Growth



* % Represents Dollar % Change YoY (vs same time LY)



Natural and Wellness Products Are Driving Growth Across All Channels

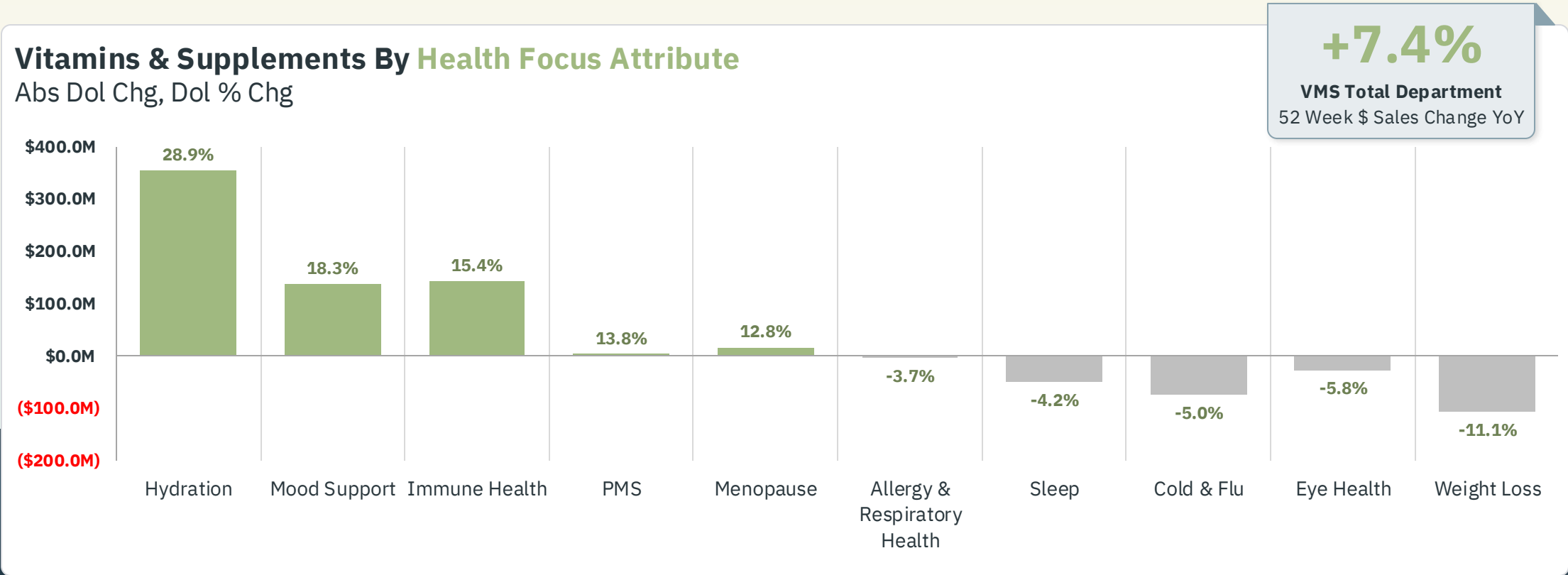
Natural products growth is outpacing in all channels. The Natural Channel has the highest overall growth rate -- a consistent recent month after month trend.

Natural Expanded Channel +5.2% Total Growth		Regional & Independent Grocery Channel -0.5% Total Growth		Conventional MultiOutlet +3.7% Total Growth		Convenience Channel +2.6% Total Growth	
+7.8%	NATURAL PRODUCTS	+11.3%	NATURAL PRODUCTS	+5.9%	NATURAL PRODUCTS	+5.4%	NATURAL PRODUCTS
+0.8%	SPECIALTY & WELLNESS PRODUCTS	-0.9%	SPECIALTY & WELLNESS PRODUCTS	+4.9%	SPECIALTY & WELLNESS PRODUCTS	+2.6%	SPECIALTY & WELLNESS PRODUCTS
-21.3%	CONVENTIONAL PRODUCTS	-15.2%	CONVENTIONAL PRODUCTS	-11.7%	CONVENTIONAL PRODUCTS	-7.6%	CONVENTIONAL PRODUCTS

Source: SPINS Total store US Natural Enhanced Channel, Regional Grocery, Conventional Multioutlet + Convenience Channels
Categories: Protein Supplements, Performance Nutrition, Energy & Sports Drinks, Wellness & Snack Bars (powered by Circana), 52 Weeks ending 12.29.24



Shoppers remain dedicated to health areas of hydration and mood support, while areas like weight loss and eye health see a decline



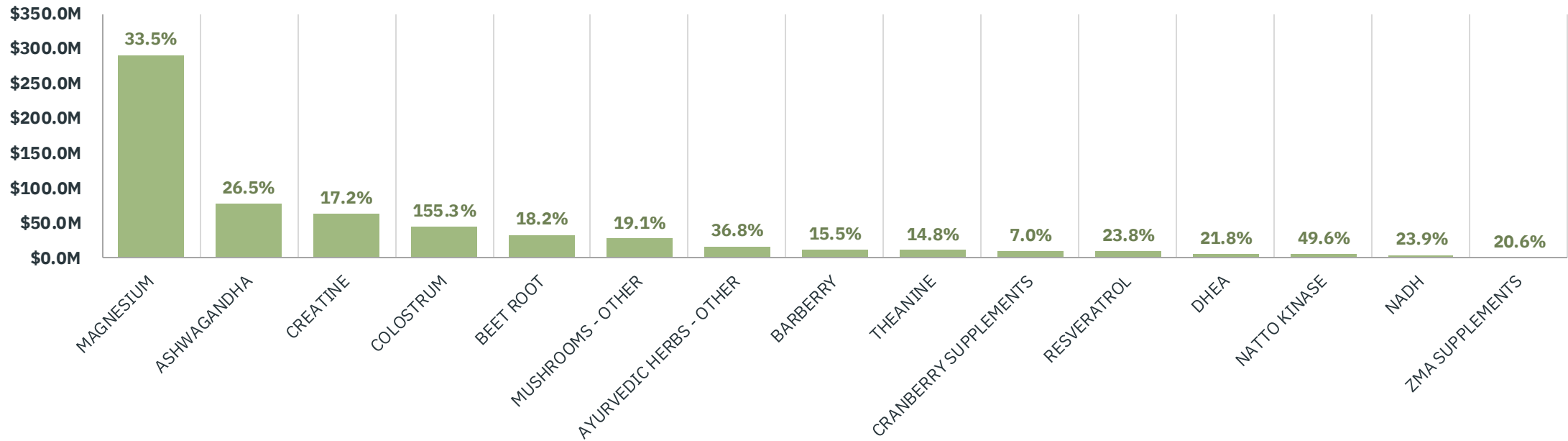
* % Represents % Change YoY (vs same time LY)



Key functional ingredients remain trendy

Top Relevant Functional Ingredients By Dollars +/- Change

Abs Dol Chg, Dol % Chg



+7.4%

VMS Total Department
52 Week \$ Sales Change YoY

* % Represents % Change YoY (vs same time LY)



WHAT'S NEXT?



Anti-Aging & Cellular Health

Look for Supplements, Ingredients, and Foods that Support Healthy Aging to Continue to Prosper in 2025 as the population gets older

Popular Anti-Aging Ingredients In Supplements:

Magnesium	\$1.2B	+34%
Collagen	\$1.1B	+5%
Turmeric	\$438M	+2%
Creatine	\$435M	+17%
Vitamin K	\$77M	+26%
Quercetin	\$70M	+3%

What's Next?

Studies show ‘abundant evidence for anti-aging and health enhancing affects’ of NMN including the ability to suppress inflammation associated with aging.

+47% Projected increase of Americans 65 and older by 2050

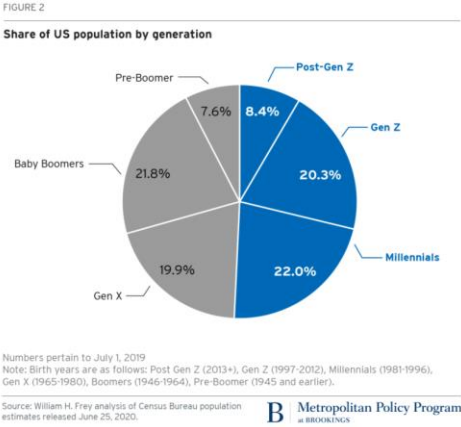
\$848M | +29%
Beauty Supplements subcategory

Here are a few areas in Food & Beverage sought after for their anti-aging properties

+7%
Green Tea

+21%
Fresh Avocados

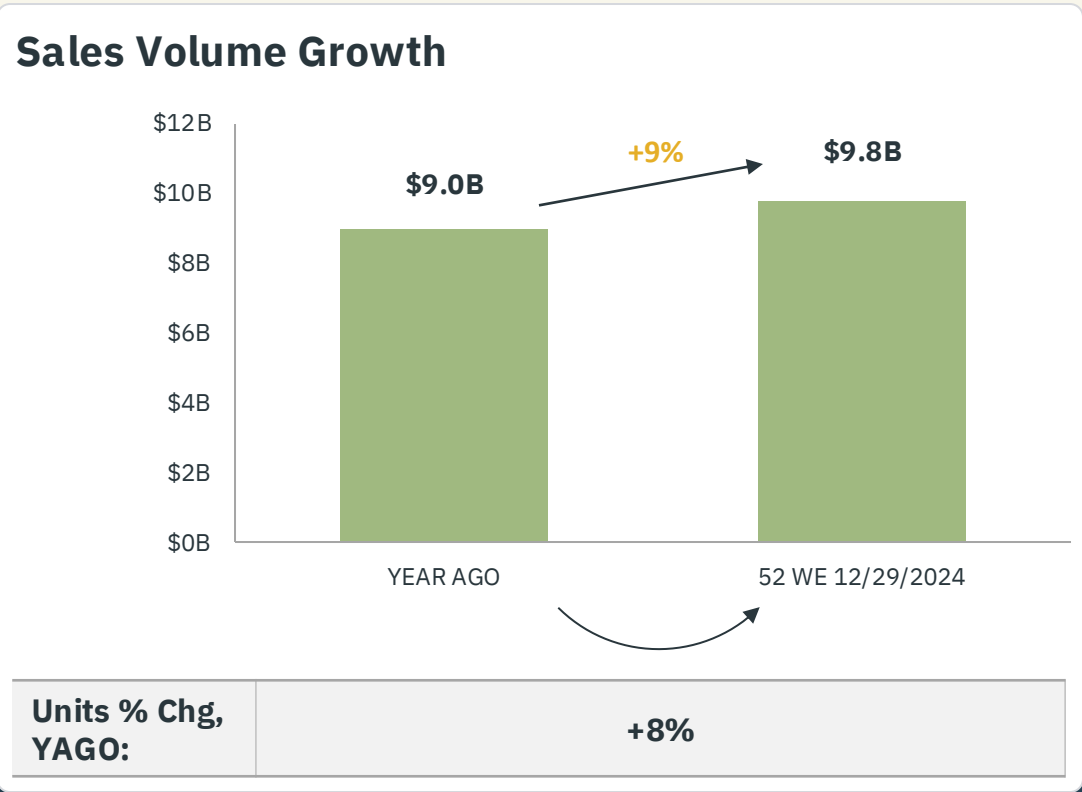
+10%
Seaweed Chips & Snacks





Protein Supplement & Meal Replacements

Two-Year Trend Insights





High Protein

Consumers, with increasingly more women are looking for high protein label claims

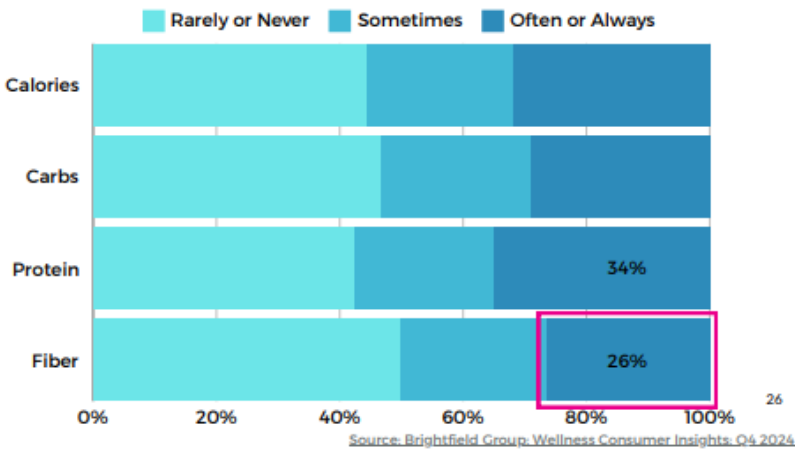
Whey Protein Powder is driving the most sales & growth

SOURCE	MARKET SHARE	YOY GROWTH
Whey	39%	+10% #1
Collagen	24%	+0%
Plant	17%	+0%
Animal	4%	-12%
Blend (Animal & Plant)	3%	-3%

Social Media Trending: 30-30-3

30 grams of Protein, 30 grams of Fiber, 3 Probiotic Foods

Track Daily Consumption



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WHAT’S NEXT?



High Protein Snacking

SS Cookies & Snack Bars



20g Protein

SS Chips, Pretzels & Snacks



18g Protein

SS Cold Cereals



13g Protein

What types of protein are being used in Snacks & Bevs with 15g+ protein?

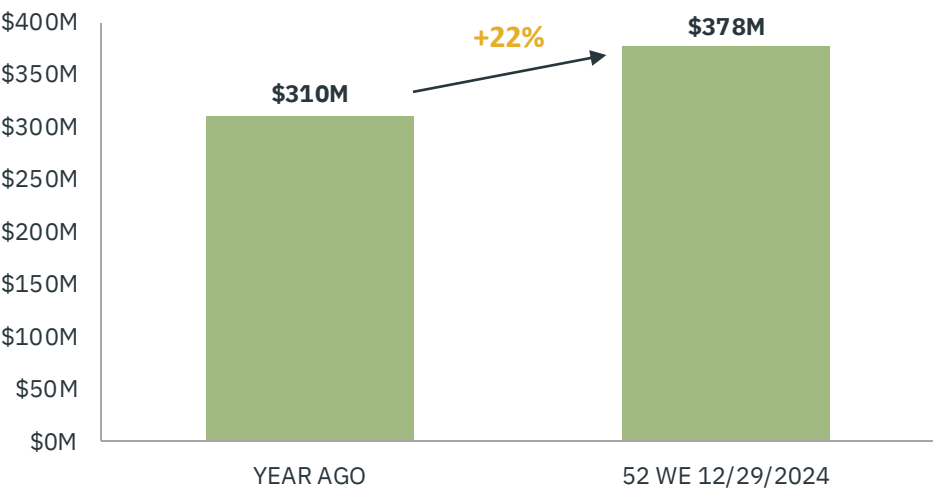
FUNCTIONAL INGREDIENT	Sum of Dollars	Dollars, %Growth Yago
PROTEIN - ANIMAL - WHEY & MILK	\$719,698,739.87	5.5%
PROTEIN - ANIMAL & PLANT COMBO	\$518,851,659.65	-8.8%
PROTEIN - ANIMAL - WHEY & CASEIN	\$203,245,078.75	103.9%
PROTEIN - ANIMAL - WHEY	\$170,332,114.49	48.1%
SOY FOODS	\$114,542,773.73	-8.7%
PROTEIN - PLANT - MULTI	\$112,714,180.22	3.2%
PROTEIN - ANIMAL - MULTI	\$109,180,313.38	12.3%
PROTEIN - PLANT - PEA	\$25,385,280.08	10.6%
PROTEIN - ANIMAL - GENERAL	\$9,654,799.80	468.2%
PROTEIN - PLANT - GENERAL	\$238,682.04	1.8%



Creatine

Two-Year Trend Insights

Sales Volume Growth



Units % Chg, YAGO:	+35%
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Room To Grow for Creatine: Gummies & Beverages

Creatine Gummies:

+360%

YoY \$ Growth



Creatine RTD:





What’s Next For Creatine

Creatine in the news

Research on Creatine Beyond Muscles

Creatine Supplementation and Brain Health

by Hamilton Roschel ^{1,*}, Bruno Gualano ^{1,2}, Sergej M. Ostojic ³ and Eric S. Rawson ⁴

Nutrients **2021**, *13*(2), 586; <https://doi.org/10.3390/nu13020586>

Effects of Creatine Supplementation on Brain Function and Health

by Scott C. Forbes ^{1,2}, Dean M. Cordingley ^{3,4}, Stephen M. Cornish ^{2,3,5}, Bruno Gualano ⁶, Hamilton Roschel ⁶, Sergej M. Ostojic ^{7,8}, Eric S. Rawson ⁹, Brian D. Roy ¹⁰, Konstantinos Prokopoulos ¹¹, Panagiotis Giannos ¹² and Darren G. Candow ^{13,*}

Nutrients **2022**, *14*(5), 921; <https://doi.org/10.3390/nu14050921>

Beyond muscles: The untapped potential of creatine

Lisa A. Riesberg ^a, Stephanie A. Weed ^a, Thomas L. McDonald ^b, Joan M. Eckerson ^c, Kristen M. Drescher ^a

International Immunopharmacology **2016**, *37*, pp. 31–42. doi:10.1016/j.intimp.2015.12.034.

Expanding Legislation on Creatine Sales

Selling weight-loss and muscle-building supplements to minors in New York is now illegal

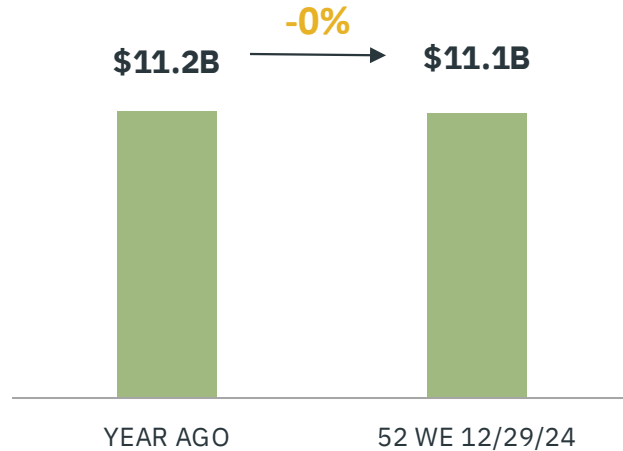


NJ State Assembly bill that restricts supplements to minors advances

NutraIngredients
— USA —

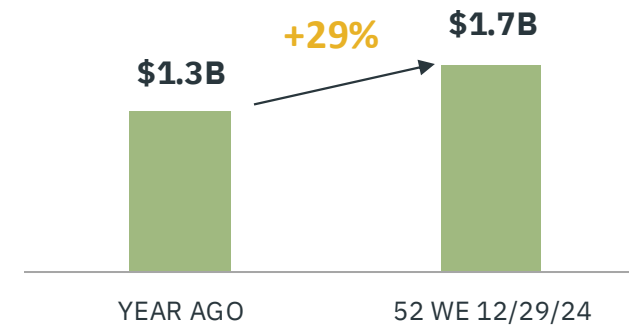
Sports & Rehydration Drinks

Sales Volume Growth



Hydration & Electrolytes

Sales Volume Growth





What's Next on the Hydration Horizon?

Newer entrants in hydration are mixing it up with refreshing forms that build on a continued demand for simple, portable solutions that are both accessible and appealing to the everyday water drinker

Hydration Drops



Hydration Liquids
under 5oz:

+10%

YoY \$ Growth

Hydration Gummies



Hydration
Gummies:








+73%

YoY \$ Growth



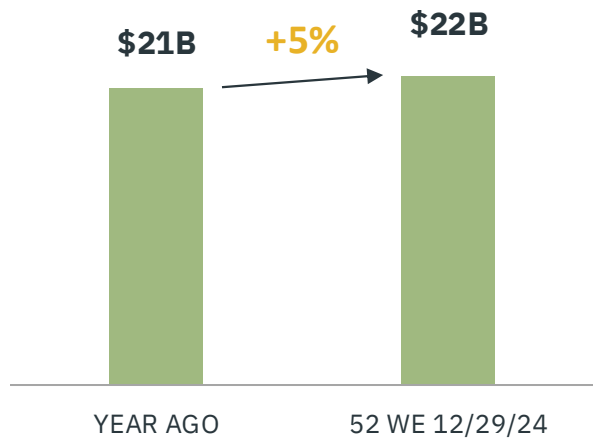
What’s next on the Hydration Horizon?

As Hydration beverages get more and more inclusive, brands and consumers are expanding their definitions by a) incorporating secondary benefits and b) looking to nature for new inspiration

Hydration Plus			Nature’s Hydration			
			YoY \$ Growth			
+ Immunity	Incorporating citrus flavors and/or vitamin C			Coconut Water <i>Coded for Hydration Benefit</i> +11%		Aloe Juice/Drink <i>Coded for Hydration Benefit</i> +30%
+ Energy	Natural caffeine sources like green tea extract or matcha			Watermelon Juice <i>Coded for Hydration Benefit*</i> +28%		Pickle Juice <i>Coded for Hydration Benefit</i> +3%
+... Protein?	Supplementing hydration with whey or a plant-based source could be next on the horizon					

Energy Drinks

Sales Volume Growth



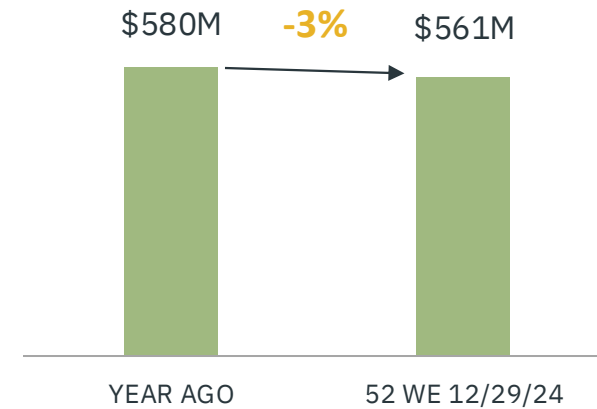
Units
% Chg,
YAGO:

+2%



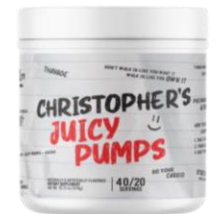
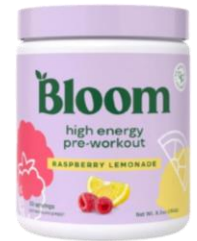
Pre-Workouts

Sales Volume Growth



Units
% Chg,
YAGO:

-2%

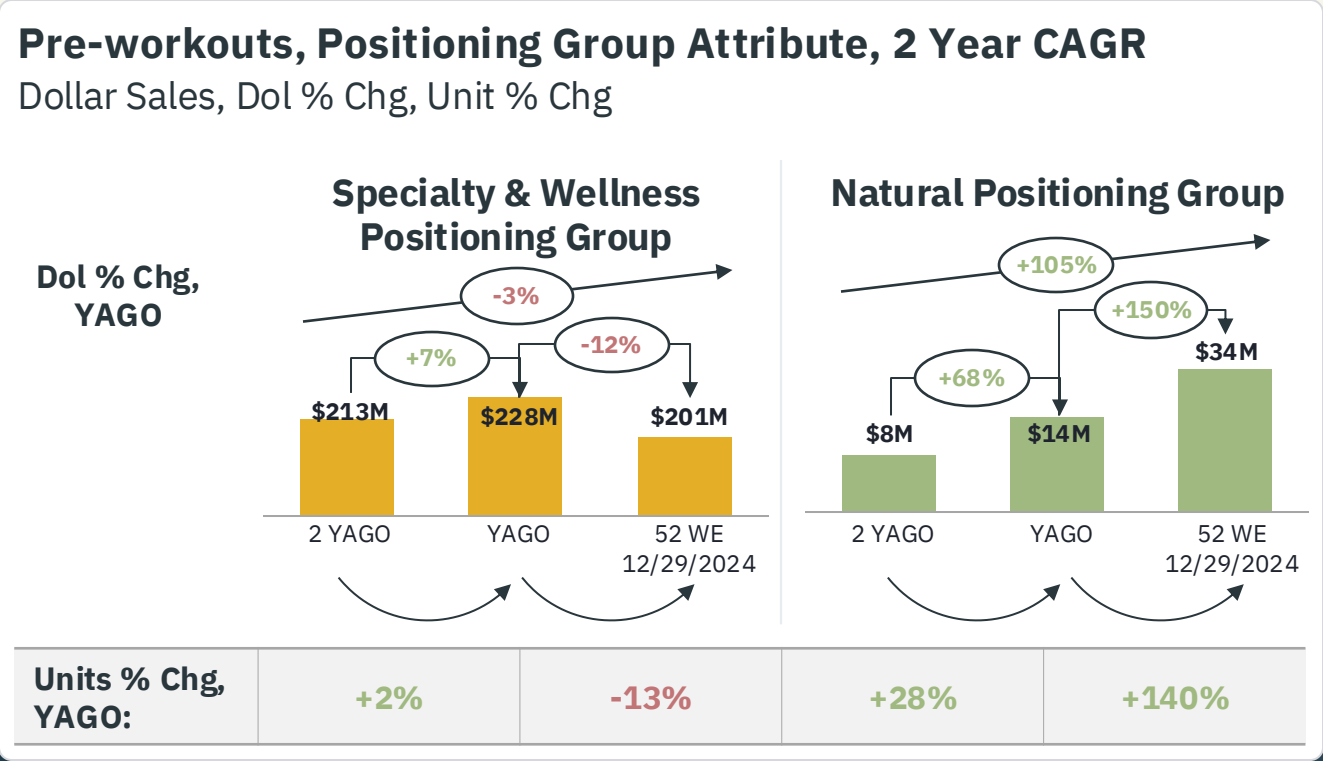




GAINING THE EDGE: PRE-WORKOUTS



Shoppers are seeking alternatives to stimulants, **shifting towards natural, multifunctional preworkout blends** that enhance performance in focus, muscle recovery, and endurance.



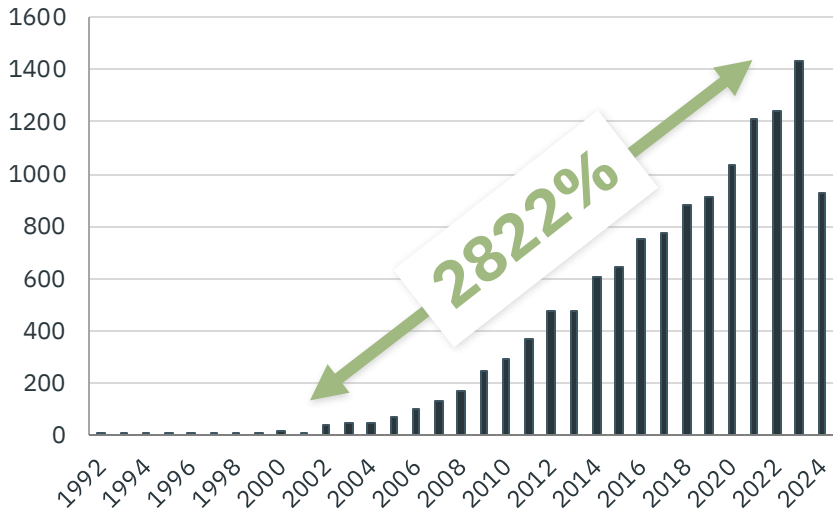
What I'm looking for in 2025





We Cannot Underestimate the **Likely Impact of Glp-1s**, Particularly With the Likely Approval of Oral Versions

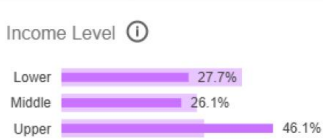
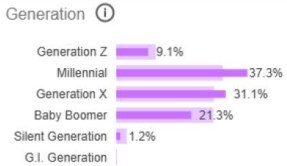
Publications on pubmed*: search term
“GLP-1 RA”



*all types of publications, not indicative of results or quality

GLP-1s/ Semaglutide Injections

Who are the GLP-1 Users?



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For educational purposes only.



Linking Functional Foods & Ingredients to Health Trends

What health trends to watch in 2025 and our predictions for each one



**Healthy
Aging**



**Weight
Management**



**Personalized
Nutrition**



**Health Tech &
Gamification**



Biological Age and Beyond

The logical next step to thinking about healthspan – proteomic clocks and etc. can serve as a check engine light for our health

Are you as old as you think you are?

Your biological age can tell a different story

Chronological Age

Age in years lived

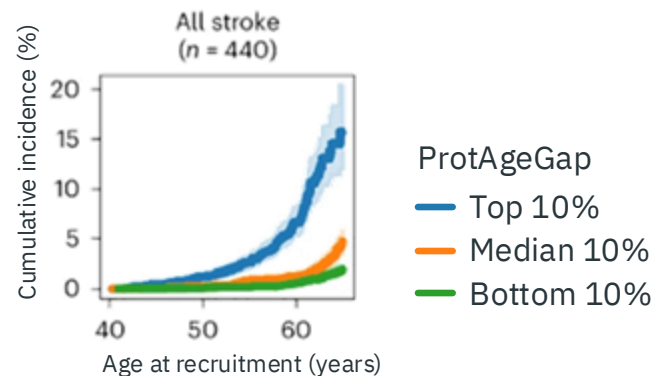
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ProtAge

Age calculated via plasma proteins

=

ProtAgeGap



Top 5% avg = 6.3 yrs older than chronological age

Bottom 5% avg = 6 yrs younger than chronological age

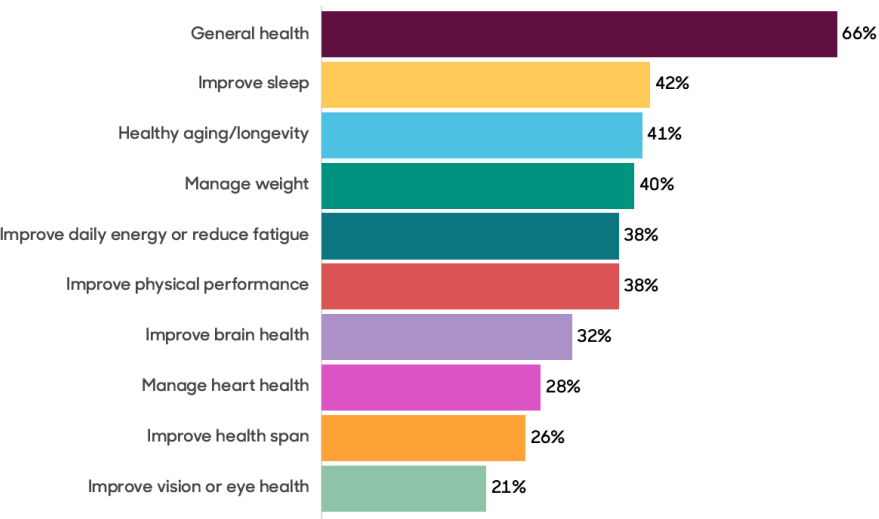
This study shows that for those that were recruited for the study at age 60, in the follow up period those in the Top 10% of ProtAgeGap (where their proteomic age was older than their chronological age) had a higher incidence of stroke vs. those in the Bottom 10%



Consumers Turn To “Biohacking”

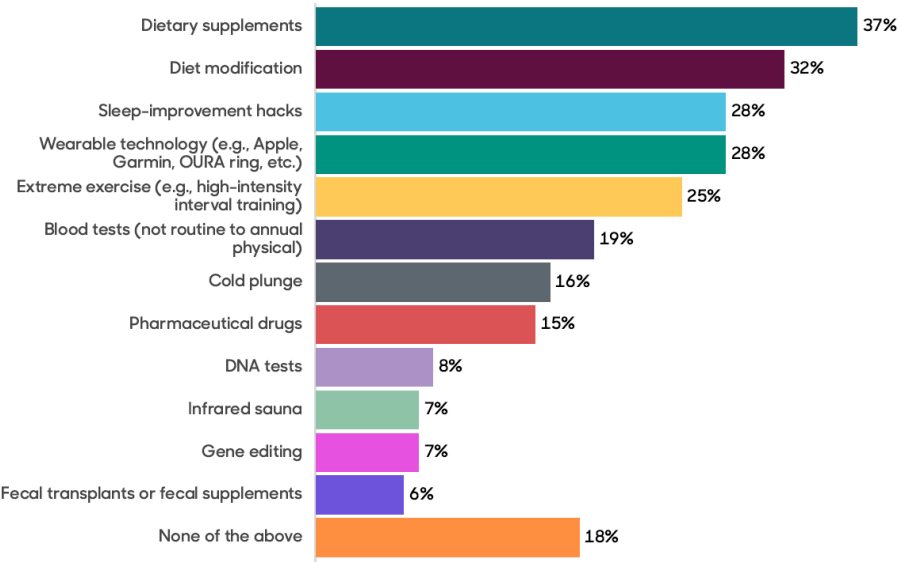
With consumers treating themselves as n=1 studies, routine adjustment happen in practically real time

Why consumers practice biohacking as part of their healthy aging routine



Source: Nutrition Business Journal survey targeting average consumers who said they either always, often, sometimes or rarely practice biohacking as part of their healthy aging practices, aged 20-75. Completed July 2024; n=414; powered by the Suzy online platform.
Question: "Why do you practice biohacking? Please select all that apply."

Top biohacking practices



Source: Nutrition Business Journal survey targeting average consumers who said they either always, often, sometimes or rarely practice biohacking as part of their healthy aging practices, aged 20-75. Completed July 2024; n=414; powered by the Suzy online platform.
Question: "What biohacking activities or habits do you include in your regimen? Please select all that apply."



Optimization Through Wearables

From rings to watches, consumers can track sleep, stress and so much more – allowing them to optimize like never before

Wearables Boom



Oura Health, maker of the Oura Ring to see annual sales double to \$500M this year

For the Glucose Curious



OTC Blood Glucose Monitors on Shelves

Feedback With AI Suggestions



WITHIN OPTIMAL RANGE

You've already reached your optimal Strain for the day. You can stop now and focus on recovery, or push yourself by building Strain above 13.3.

Personalized recommendations based on your own metrics, often powered with AI



WHAT’S NEXT?



Functional Beverage Ingredients

Functional beverages are tapping into rising consumer interests and expanding the audience beyond traditional beverage buying habits. Up-and-coming ingredients and formulations will continue to create new opportunities for brands and retailers.

Digestive Health (+36%)		
Top Subcategories		
Soda Diet & Alternative Sweetened	\$850M	135.4%
Kombucha	\$755M	1.3%
Wellness Shots	\$82M	10.0%
Functional Beverage Other	\$75M	-18.8%
RF Juice & Juice Drinks	\$34M	3.9%
Top Functional Ingredients		
Kombucha Cultures	\$742M	0.3%
Fiber - Other	\$427M	116.9%
Cider Vinegar Supplements	\$373M	152.0%
Probiotic Supplement	\$272M	10.8%
Turmeric	\$2M	33.4%

Mood Support (+66%)		
Top Subcategories		
Water Sparkling Flavored	\$27M	65.9%
Functional Beverage Other	\$24M	136.3%
Wellness Shots	\$6M	-5.4%
SS Tea Rtd	\$1M	-17.7%
Kombucha	\$1M	-21.5%
Top Functional Ingredients		
Ashwagandha	\$22M	109.8%
Magnesium	\$10M	121.6%
Cannabidiol (CBD)	\$8M	-5.9%
Probiotic Supplement	\$5M	-6.0%
THC Delta 8	\$5M	1271.5%

Cleanse & Detox (+12%)		
Top Subcategories		
Wellness Shots	\$15M	9.0%
RF Lemonade & Limeade	\$3M	111.0%
Kombucha	\$1M	177.5%
RF Juice & Juice Drinks	\$0M	-60.9%
SS Tea Rtd	\$0M	-32.9%
Top Functional Ingredients		
Probiotic Supplement	\$12M	-3.1%
Spirulina Blue Green Algae	\$2M	78.6%
Dandelion	\$1M	New
Cayenne	\$1M	-16.8%
Kombucha Cultures	\$1M	177.5%



The Modern Kitchen is Changing

Flavor



Texture



Pack Size





Evolution of Search

Search engines used to reign supreme but now, consumers have more ways to find the products they're looking for





AI Search Takeover

Below is what it's like to ask AI what are the best **creatine** – how does a brand get on a list like this?

Perplexity

- Thorne
- Optimum Nutrition
- Gnarly
- SteelFit
- Transparent Labs

ChatGPT

- Thorne
- Optimum Nutrition
- Kaged
- Transparent Labs
- BulkSupplements
- MuscleTech
- Beast Sports Nutrition
- Cellucor
- MyProtein
- NOW

Gemini

- Transparent Labs
- Optimum Nutrition
- Nutricost
- Naked
- Onnit

Why AI Chatbots?

Consumers are annoyed with SEO-gamified/ low quality articles

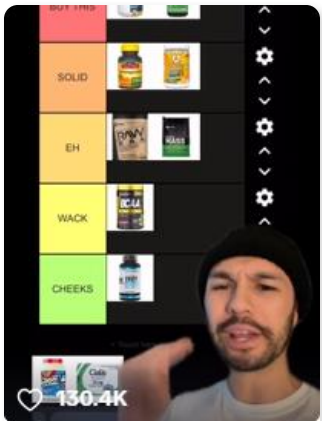
Now, consumers often add **'reddit'** (a forum site) to the end of their search to get better answers [6th most searched term on google in 2024]

Reddit now sells its data to OpenAI, Perplexity and others as they use forum answers to power their models



Products Are Found in the Comments

68% of TikTok users say brands should use the comment section to better understand their customers



#tierlist #supplements...

bodycomp.rx 2.2M



Joseph Zanfino
Fairlife > protein powder
2023-2-... Reply

1030



!!What foods next? Which of these would you say is best...

zachcoen 120.1K



B B
Thank you for doing this! So I don't have to spend money and try things I dont like! Quest texture is my fav too !
6-21 Reply

6



I take these pretty much daily

jessicabickli... 1.3M



boiboi
you gotta mention what magnesium it is. because people be out here buying magnesium citrate and be wondering why they on the toilet all day

2-7 Reply

206



Thank You!

For more information,
contact **sdicker@spins.com**



1. Calendar-powered coordination

Our editorial calendar includes **three types of content** from across the organization



Show Support Content

On stage presentation(s) to **support priority tradeshows** like Expo West, Beverage Forum, Plant Based World etc.

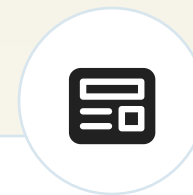
- ✓ Designed to be presented
- ✓ May not overlap with monthly theme
- ✓ May be utilized in SPINS content burst in different month where applicable



Monthly Content

Monthly perspective pieces & pillar pieces that focus on **specific topics.**

- ✓ Standard comms/marketing “machine” and content burst
- ✓ Timed to align with major milestones



Ad Hoc Content

Opportunistic content created to support clients or partners throughout the year

- ✓ Client Support
- ✓ Relevant opportunities to increase SPINS presence and reputation





1. Calendar-powered coordination

Our editorial calendar includes **three types of content** from across the organization

