

Sports Powders: STILL STRONG

Sports powders are expected to grow in popularity as their user base broadens.

BY MIKE STRAUS



The growth of the sports supplement industry as a whole is giving professional, semi-pro, and casual athletes a greater array of options for supporting their performance—and market experts say that this is good news for manufacturers and marketers of sports powders especially. More competition may not appear to be a positive, but according to these experts, alternative supplement formats like bars and tablets present a variety of issues that will ensure powders' dominance in the market.

These experts also warn, however, that successfully taking advantage of the expected resurgence of powders will require new strategies to target a new generation of

powder buyers. No longer content to simply use protein powders for muscle bulk, today's sports powder users are looking for increasingly specialized products with ingredients custom-tailored to their specific needs.

Growing Market

Matthew Oster (Chicago, IL) is a research analyst at Euromonitor International, a global market research firm that tracks nutrition industry trends. Oster says that according to Euromonitor data, the powder market is still growing quite rapidly, especially in the United States and Western Europe. Oster expects the powder market to expand beyond its core user base.

"In a lot of places, the core user demographic is expanding," Oster says. "There aren't many consumer goods that have a 30-year history like sports powders do that are still growing at a fast pace. Even if you think of sports powders as a niche product with a growth ceiling, the market is still growing quite rapidly—which is atypical for consumer goods."

Euromonitor's research indicates that the American sports powder market—worth approximately \$5.6 billion in 2014—is expected to see 9% annual growth between 2013–2018. And while ready-to-drink sports supplements are seeing fast adoption, Euromonitor data indicate that powders remain (and

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A LONG HISTORY OF POWDERS

While modern sports powders were first invented in the 1950s, they have an ancient precursor that dates all the way back to the classical era. One of the earliest references to a powder-like sports supplement is found in the writings of Roman philosopher Pliny the Elder (AD 23–AD 79). In *Natural History*, Book XXXVI, Pliny the Elder quotes scholar Marcus Varro as saying, “Your hearth should be your medicine chest. Drink lye made from its ashes...gladiators after a combat are helped by drinking this.”

will continue to be) the dominant delivery format, with protein powders accounting for almost 80% of all sports nutrition protein supplement sales in the United States.¹

Sports Powders Still Best Delivery Format

What makes powders so great? Debasis Bagchi, PhD, is a professor in the Department of Pharmacological and Pharmaceutical Sciences at the University of Houston (Houston, TX) and the chief scientific officer at ingredients supplier Cepham Inc. (Piscataway, NJ). A former president of the American College of Nutrition, Bagchi has participated in the development of a variety of sports nutrition formulations involving amino acids and whey

proteins. Bagchi points to one big benefit of powders over other delivery formats when formulating supplements—namely, that powders are stable.

While the ingredients used in ready-to-drink supplements tend to degrade over time, Bagchi says, powders maintain their integrity very well. Bagchi also points to a variety of problems with other formats as factors that will ensure powders remain popular.

“A lot of companies have cornered the market on bars,” Bagchi says, “but bars are loaded with sugar. Tablets are the same; they use sugar to bind ingredients. Tablets and bars have lots of additives. But powders have only the core constituents and very few additives.”

Elyse Lovett, marketing manager at ingredients firm Kyowa Hakko (New York City, NY), points to another characteristic of powders that ensures their supremacy over other formats. Says Lovett: “You can get more ingredients into a powder, and in higher concentrations, than you can into a bar, capsule, or pill. The powder takes a bit more effort to prepare, but it’s worth it. Powders are also a great way to stay hydrated when you dissolve them in drinks.”

Joe Weiss, president of ingredients firm Nutrition 21 LLC (Purchase, NY), details other practical benefits of powders for the consumer—namely, that “they are flexible in that users can create their own custom

blends to support their exercise, fitness, or bodybuilding regimen.” And for manufacturers? “Powders have an advantage over RTDs [ready-to-drink beverages] in that the cost of shipping water isn’t a factor for manufacturers,” he says.

Emerging Niches Provide New Opportunities for Sports Powders

A renewed interest in health and fitness—and a continually diversifying array of products—is expected to give sports powder manufacturers a variety of new avenues for targeting powder users in ways that weren’t previously possible. Market segmentation means that powder consumers can benefit from new powders that appeal to specific demographics and meet specific needs.

Lovett says that one growing niche is brain health. Powder users are looking for a mental edge, she says, one that boosts focus and improves reaction time.

“[The opportunities in brain health] could be anything from college sports all the way up to professional leagues,” Lovett notes. “Think about Olympic athletes. Even the second-place athletes are just seconds away from winning. Even a one-second decrease in reaction time could mean the difference between first and third place, and when you look at the research on brain health, a lot of the brain health ingredients in powders are showing a positive impact on sports performance.” This includes Kyowa Hakko’s own Cognizin citicoline ingredient, which has been clinically shown to support mental energy, focus, attention, and recall.

Another example? Researchers recently found that Nutrition 21’s Nitrosigine ingredient, an inositol-stabilized arginine silicate, improved cognitive performance in healthy, exercising adult men.² Subjects supplementing with Nitrosigine performed better in neurophysical tests involving visual attention and task switching. “The study showed a 33% increase in cognitive acuity, including processing speed and executive functioning,” Weiss explains. “This makes Nitrosigine unique in the sports nutrition space by providing non-stimulant energy in pre-workout products as well as helping athletes improve their ability to focus.”

Other emerging niches include products aimed at seniors and women. Oster says that emerging trends suggest an increasing

INTERNATIONAL SPORTS POWDER MARKET RAPIDLY EXPANDING

The North American sports powder market is very well established, says Euromonitor research analyst Matthew Oster, with the U.S. market approximately six times larger than emerging markets like Europe. However, international markets are undergoing rapid growth, with the United Kingdom and Germany leading the charge. Oster says he expects sports powders in those areas to reach the level of RTD supplements and bars in just a few years, noting that what’s happening in Western Europe “is the same thing that happened in the United States over the last 15 years, but in the UK and Germany it’s happened within the last two to five years.”

need for muscle-building powders marketed toward women. Marketing muscle-building powders toward women, however, will require a unique approach, he says.

Says Oster: “When you attract women who are involved in weight training, you can’t market the powder as a muscle-building product. You want to market it as a lean or diet powder. The gap in the market is for a lean product—a powder that’s formulated and positioned around building lean muscle and supporting general health.”

It also appears that a new opportunity in the 55-plus age demographic is on the horizon, as evidenced by the European Food Safety Authority’s February 2016 approval of a health claim for creatine and muscle strength for people over the age of 55.³ Taking advantage of this opportunity, however, will require a creative strategy and new product positioning.

Lovett says that sports powders marketed toward seniors should have health claims written in common terms, with an emphasis on health maintenance rather than muscle building.

Oster agrees, noting that educating the market will be a key strategy. Says Oster: “Seniors tend to be active supplement users, so it’s not a matter of convincing them to supplement their nutrition. It’s more about getting them to understand what the supplement is doing for them.”

Oster suggests that a successful sports powder marketed toward active seniors would likely position itself around supporting heart and bone health, improving endurance, and maintaining a high quality of life.

“When you start to expand your positioning,” Oster says, “you start to compete

with the whole market of products that are positioned for elderly consumers. There’s a balance to be struck between the sports angle and the seniors angle.”

Changing Markets Require a New Approach

Oster has illustrated one of the main challenges facing the powder market: advertising. While sports powders’ user base has broadened to include casual athletes, the changing market demographics indicate that product positioning will require manufacturers and brand consultants to strike a delicate balance in the types of claims they make.

“Casual users are fundamentally most interested in health-and-wellness claims rather than sports nutrition claims,” Oster says. “A lot of these casual athletes are focused on broader claims like ‘non-GMO’ and ‘organic.’ Powders are stereotypically associated with bodybuilders, which is an optics problem that needs to be straightened out.”

Oster says that product positioning is starting to change, and with the new challenge of attracting as broad a user base as possible, more widespread adoption is happening in fits and starts. Oster points to the proliferation of new market segments as an opportunity for growth. Expanding beyond core powder users, he says, will mean appealing to adherents of the paleo movement, as well as vegans. Nutrition 21’s Weiss points out that when it comes to plant-protein powders, “Recently, these products have been dramatically improved from a taste and mouthfeel standpoint, which has helped them become more mainstream.”

But Paleo dieters may also view vegan options as inferior to animal or dairy proteins,



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Oster notes, which is why beef protein powders are gaining popularity. The common thread running between the two trends, he says, is a clean-label approach.

Bagchi agrees. "People are getting more careful with what they put in their bodies. There's a lot of research in the public domain to show how ingredients and products are performing."

Safety First

Certification and research are also important, Bagchi adds. A growing demand for certification is expected to benefit the sports powder industry by providing easier access to a more mainstream consumer base and rout low-quality products from the industry. Oster says that a certification program for sports powders will allay consumers' fears

and expand powders out of the niche market and into the mainstream.

Says Oster: "There's still this reluctance on the part of consumers. They want to know what they're putting in their bodies. There's all this news about dimethylamylamine (DMAA) coming out, news about questionable formulations and adulteration of products, powders started outside any kind of regulatory apparatus. A certification procedure will only help to allow for greater adoption among mainstream consumers."

Looking Forward

The best strategy for capitalizing on the resurgence of sports powders, these experts agree, is threefold: Narrower target audiences with specialized marketing claims, clean-label practices that encourage transparency around formulations and ingredients, and a greater variety of formulations that can appeal to specific market segments like paleo dieters and vegans.

When striving to take advantage of a rapidly expanding market, it seems that the tried-and-true, honest approach works best: Sell your audience on the benefits that they want, and then give them the high-quality product that they need. **N**

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