

ATTITUDES TOWARDS SPORTS NUTRITION – GERMANY – 2023

Targeting an ageing society and moderate exercisers via customisation, evidence-based claims and less processed, natural offerings could unlock category growth.



A Mintel Analyst, Global Analyst



Attitudes Towards Sports Nutrition – Germany – 2023

This report looks at the following areas:

- Market drivers for sports nutrition, including the impact of inflation, an ageing population and personal health issues
- Frequency of exercising amongst Germans, with eight in 10 exercising
- Consumption of sports nutrition products, with the 16-24s being the primary user group
- Changes in spending behaviour, including lower discretionary spending
- Aspects prioritised sports nutrition products with quality being the key priority, yet good deals also playing a main role
- Behaviours and attitudes related to sports nutrition, including the need for credibility and versatile product offerings
- Recent product launch activity and innovations



Targeting an ageing society and moderate exercisers via customisation, evidence-based claims and less processed, natural offerings could unlock category growth.

Overview

43% of Germans use sports nutrition (SN) products and 16-24s are core users, meaning the **majority of Germans are non-users**. Yet, **eight in 10 Germans exercise**, posing an opportunity to further push SN as necessary exercise accompaniment. A 5 percentage point user cohort growth since 2021 (38%) indicates a rising **mass market appeal of SN despite traditionally targeted at high-performance sports/fitness users**.

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Ingredient price rises have prompted **49% of users/buyers** to buy SN more on promotion, while 36% switched from brands to own labels, mirroring the **entrenched role of own-label** foods/drinks in Germans' shopping habits. A growing democratisation via **own-label SN products is therefore likely, leveraging price perception advantages and trust in established grocery retailers.**

SN brands' challenge and opportunity is Germany's ageing population, as SN usage among **over-65s** is currently low. **When people age, exercise frequency decreases due to declining physical strength**, yet only **26% of over-65s** are not exercising. This presents a major chance for SN brands to target over-65s with SN carrying relevant benefits like prolonging physical strength.

Further, amidst government efforts to boost healthy diets and consumer concerns around 'ultra-processed foods', natural and plant-based SN reformulations could improve the category's image.

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Report Content



EXECUTIVE SUMMARY

- The five-year outlook for sports nutrition

Market context

- The role of quality in sports nutrition could spur value sales
- Potential for sports nutrition to take on a more general role in everyday nutrition
- A stronger focus on naturalness could increase appeal of sports nutrition and boost volume sales

Mintel predicts

- Sports nutrition brands must be prepared to fight off competition from own labels
 - Graph 1: performance nutrition launches, by private label, 2019-23
- Demographic changes could challenge long-term category growth if unaddressed
- Brands are likely to consider low intensity exercisers' needs to extend the reach of SN

Opportunities

- Be an early adopter in an era of cricket-protein based sports nutrition
- Convince buyers with evidence-based SN formulas
- Age-specific targeting an opportunity to reach both the main target group as well as over-65s
- The right level of personalisation is vital to stop less sports-minded SN users from disengaging
- Take a more differentiated approach to protein products to benefit from the momentum

MARKET DRIVERS

The German economy

- Economic recovery to follow the slowdown in 2023
 - Graph 2: key economic data, in real terms, 2019-25
- The inflation rate is slowly bouncing back to more conventional levels
- Inflation is still the key factor affecting consumers' finances...
- ...confidence and expenditure
 - Graph 3: financial confidence index, 2022-23
- Financial situations correlate with the use of sports nutrition products, causing a sales barrier
- Rising food prices dampen sports nutrition consumption, but offer a chance for own labels
- Fitness industry at risk of cutbacks, yet social medial and D2C could dampen the blow to SN

Personal health and demographic changes

- Projected increases of elderly in the population poses a challenge with 16-34s as the core SN users

Attitudes towards Sports Nutrition – Germany – 2023

- Graph 4: projected share of adult population, by age group, 2022-32
- Getting seniors to exercise will remain key to maintain category growth for sports nutrition
- Activity decreases with age...
 - Graph 5: frequency of exercising for at least 30 minutes, by age, 2023
- ...a trend that sports nutrition can help counteract, whilst equally boosting volume sales
- Weighing up the importance of a healthy diet against financial concerns paves the way for SN products with a high satiation value
 - Graph 6: frequency of eating healthily, 2020-23
- Demand for sports nutrition with added health benefits increases...
 - Graph 7: top factors when shopping for food*, 2022 vs 2023
- ...allowing sports nutrition to take on a more general role in everyday nutrition
- German government advocates for a more plant-based diet and activity to sustain a healthy society
- WHO advises against use of non-sugar sweeteners (NSS), stating the need for reformulation of SN products
- The ultra-processed food debate may challenge the sports nutrition category in favour of 'natural'

WHAT CONSUMERS WANT AND WHY

Frequency of exercising

- Eight in 10 Germans exercise, posing an opportunity to push sports nutrition as a necessity for an ageing population
- While functional claims are less engaging for over-55s, naturalness is the way to reach seniors
- The integration of organic and natural ingredients: a distinction from 'ultra-processed'
- Exercising is here to stay: help young Germans boost their performance with tailored SN products
 - Graph 8: change in frequency of exercising over the last 12 months, 2023

Consumption of sports nutrition products

- Less sport-centric products with proven holistic health benefits as bait for the sceptic German
- Sports nutrition is gaining momentum, especially protein bars, which offer an opportunity for brands to increase sales
 - Graph 9: usage of food and drink tailored for taking part in sport/exercise, 2021 vs 2023
- Protein bars are an entry-level product for SN and pave the way for more versatile protein applications
- Stand out in a saturated market for protein SN products with a variation of protein level
- Position energy bars as an alternative to sports and energy drinks to capture market shares
- Beyond supplement capsules, SN meal replacements are a way to target women
- Consistency in SN usage: a curse and a blessing, brands need to find ways to take up more space in consumers' routines
 - Graph 10: consumption frequency of food and drink tailored for taking part in sport/exercise, 2023

Spending behaviour in the context of sports nutrition products

- Steady SN buyer base requires action to generate category growth
- It's not just 'old people': remove the negative connotations linked to age to win the over-45s as customers
 - Graph 11: purchase of food and drink tailored for taking part in sport/exercise, by age groups, 2023

Attitudes towards Sports Nutrition – Germany – 2023

- With reduced spending capacity, promotions are key for SN to remain in Germans' shopping baskets
 - Graph 12: impact of less spending money on purchase behaviour of sports nutrition products, 2023
- 'Hamstern', a typical German habit that can help push volume sales for the SN category
- Discounters and retails can go for market shares in the SN segment with own labels or tertiary brands

Aspects prioritised in sports nutrition products

- Quality outranks even price, giving SN brands the chance to opt for premiumisation
 - Graph 13: aspects influencing the choice of one sports nutrition product over another, 2023
- Consumers' focus on high-quality SN opens a window for premiumisation in sports nutrition
- Trusted quality: it is imperative that the message is clear, concise and convincing
- Offer high-quality SN products, but don't lose sight of reasonable prices
- Own labels can help consumers on the trading-down journey with credible SN products
- Use professionals as brand ambassadors...
- ...and establish credibility by referring to scientific/clinical studies

Benefits expected in sports nutrition

- Exercising Germans prioritise immune strengthening benefits, which links general health and continuous exercising
 - Graph 14: ranking of benefits to prioritise in sports nutrition, 2023
- The desire for satiety hints that sports nutrition could play a bigger role in day-to-day nutrition
- Tweak the appeal of SN to the holistic health-conscious German with more obvious signals
- Introduce gut health as the key to optimal absorption of sports nutrition

Behaviours related to food and drink tailored for taking part in sport/exercise

- The desire for customisation and 'feeling good about oneself' opens up new areas for SN to use technology and tap into new categories
 - Graph 15: behaviours related to food and drink tailored to take part in exercise/sports, 2023
- The right level of personalisation is vital to avoid less sports-minded SN users from disengaging
- Use sport technology to simplify personalisation
- Focus on the feel-good aspect of sports nutrition
- Consider low-intensity exercisers and their needs to extend the reach of sports nutrition
- Non-sports nutrition brands can target low-intensity exercisers with wellness-related foods/drinks

Attitudes towards sports nutrition

- Diversification is key to both taste and expanding target group appeal
 - Graph 16: attitudes towards food and drink tailored to take part in exercise/sports, 2023
- Target specific age groups to increase attractiveness with the main target group
- Appeal to over-65s by elevating sports nutrition products to 'must-haves' of healthy diets...
- ...but be considerate of seniors' living circumstances
- Range extensions by savoury flavours could ensure further consumer engagement

LAUNCH ACTIVITY AND INNOVATION

- Nutritional drinks, snacks and sports/energy drinks dominate the SN space
 - Graph 17: performance nutrition launches, by category shares, 2019-23
- The sports nutrition business is increasingly shifting to the D2C space...
 - Graph 18: performance nutrition launches within food and drink, 2019-23
- ...supported by social media as a vital promotion tool
 - Graph 19: product launches in performance nutrition market, by top five positioning claims, 2019-23
- No room for distraction, claims focus on functionality
 - Graph 20: performance nutrition launches, by top claims, 2019 vs 2023
 - Graph 21: performance nutrition launches, by top claim categories, 2019 vs 2023
- Energy is in high demand, but so are other fortification claims in sports nutrition products
- The high protein hype in mainstream brands has peaked and is now plateauing
 - Graph 22: performance nutrition launches, by high/added protein claim, 2016-23
 - Graph 23: food and drink launches*, by high/added protein claim, 2016-23
- High-protein snacks add to the savoury flavour range
- Savoury sports nutrition products tap into the full meal and side dish category
- Stating the obvious: high protein claims in product categories with naturally high protein content
- Protein: from animal to plant-based to crickets
- Enhancing the image of sports nutrition by cutting back on preservatives while increasing the use of organic ingredients
 - Graph 24: performance nutrition launches, by 'natural' claims, 2019 vs 23
- Brands remain the main drivers of sports nutrition innovation, but own labels are hot on their heels
 - Graph 25: performance nutrition launches, by top ten ultimate companies, 2021-23
- Customer binding through a rewarding all-in-one shop at Prozis
- Bodylab24 sets a high standard for quality control and transparency
- Foodspring focuses on high-quality and consumer empowerment
- Private label is entering the sports nutrition market, challenging brands for share of throat
 - Graph 26: performance nutrition launches, by private label, 2019-23
- Discounter Aldi shakes up the sports nutrition category with its new brand 'Aldi Sports'
- A moderated sports design could increase appeal among leisure athletes and women

Advertising and marketing activity

- Changing the face of sports nutrition with a Netflix movie featuring bodybuilding legends
- Clear Iso whey for clear performance goals
- Feed your fire, no matter the intensity
- Brand collaborations and treat launches venture into the sports nutrition category
- IN FORM, a government initiative to get Germany moving

APPENDIX

Appendix – products covered, abbreviations, consumer research methodology and language usage

- Products covered in this Report
- Abbreviations
- Consumer research methodology
- A note on language

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