MULTICLIENT STUDY

Business Review
Ingredients for Performance Nutrition Markets
Supply, Demand and Forecasts

USA, EU28

2015-2020

March 2017

Sectors







Bars, Beverages,

Supplements







Markets



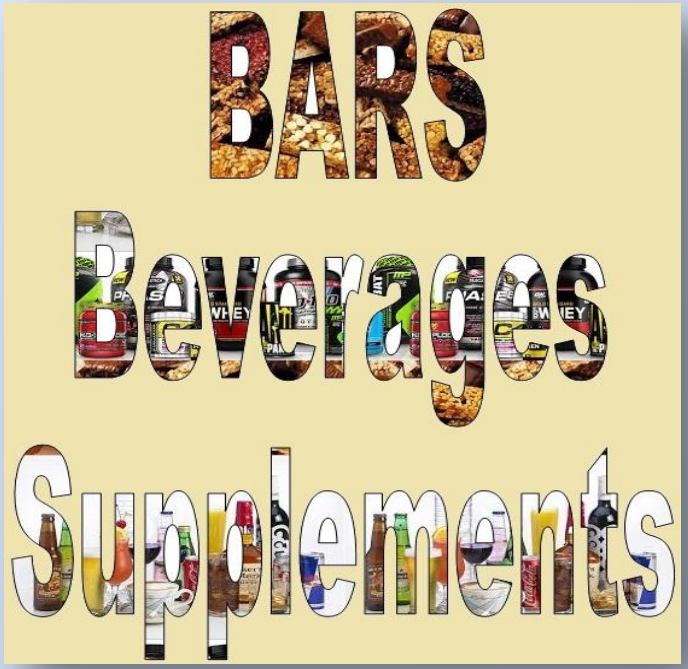
USA

EU28

GIRACT
Geneva, Switzerland

Transnational Business Research & Consultancy

Introduction



Performance nutrition ingredients have different positioning within the market. Broadly they can be positioned for energy, nutrition/muscle mass, endurance and recovery. There are some overlaps between these positioning and this study aims to explore the synergy between positioning if any, or if it is a deterrent to further penetration due to unclear communication of benefits to the consumer. Carbohydrates, proteins, amino acids, carnitine and creatine are ingredients in the market right now. These can go into supplements (which are very popular), bars or beverages. Very rarely other matrices are chosen for delivering these ingredients to the consumer.

Glucose, crystalline fructose and maltodextrin are the three main carbohydrates, along with ribose, going into the performance nutrition space. Only ribose has a specific positioning for performance nutrition, while glucose and fructose may also be sweeteners. Maltodextrin in PN has specific positioning for energy, but in other sectors has a variety of technical functions. Giract has considered these factors and has presented only volumes going into the PN space without distinguishing the technical (sweetener) or functional (energy) properties.

Between proteins and amino acids, there is considerable overlap. Proteins can be efficient providers of specific amino acids positioned for performance - glutamine, arginine and the BCAAs.

They are also cost effective and therefore provide stiff challenges to the penetration of amino acids in the performance nutrition space. Very specific applications require pure amino acids. Carnitine and creatine are effective energy enhancers by modulating metabolic processes. Being the only "additional" component of any performance nutrition product, even though they are considered natural, they face some controversy in use by enthusiasts.

Giract aims to understand the trends influencing the market for these ingredients, keeping the above factors in mind to arrive at reasonable estimates of volumes and sector splits. Giract, the food ingredients and technology business review specialist, has a background of 40 years' research and forecasting. It has an unparalleled understanding of the dynamics of the marketplace and privileged contacts with opinion leaders worldwide. As a key player or a company wishing to learn more about these buoyant ingredients, this study serves a dual purpose for you - to help explore and exploit these high-profile markets and to make full use of an in-depth understanding of the market drivers to develop your overall business strategy in this sector.

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Objectives of this study

Ingredients for Performance Nutrition Markets – Supply, Demand and Forecasts



- To examine the trends in production, prices and producers of these ingredients
- To estimate current demand for these ingredients across regions and end-use sectors, both food and non-food
- To understand the 'why' and 'why not' concerning the use/non-use of these ingredients by key end-users in the food and supplement sectors across regions
- To elucidate the competitive scenario
- To forecast demand to 2020 by ingredient across end-use sectors and regions

This unique study examines supply/demand and forecasts of Ingredients for Performance Nutrition markets in USA & EU28.

SCOPE

Products



- Carbohydrates (Glucose, crystalline fructose, maltodextrin, ribose), Proteins (WPC 35, WPC 80, WPI, MPC, MPI, Casein/caseinates, SPI, Pea, Soy flour, TSP, Wheat protein isolate, Rice, Egg, Gelatin, Hydrolyzed collagen), Amino acids (glutamine, Arginine, BCAAs), Creatine and Carnitine

Markets



- **USA**
- **EU28**

STUDY HIGHLIGHT

Programme

The dominant element of the study is interviews with key players - manufacturers/ distributors/ end users – from which a real understanding of the market has been derived

Current: 2015
Forecast: 2020

Timescale



WHAT DO YOU GET?

1. **Electronic Copy** of report in searchable PDF format
2. **One Printed Copy**
3. Report published in **March 2017**

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For

CLIENTS OF THE MULTI CLIENT REPORT

by

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Within this study, Giract has reported its understanding of the current and future positions of individual companies with regard to use of specific ingredients. Whilst these are Giract's honest recording of specific interviews, they must not be considered as an 'official position' of the company in question. Giract accepts no liability for any errors or omissions in its information or forecasts or for any consequential loss.

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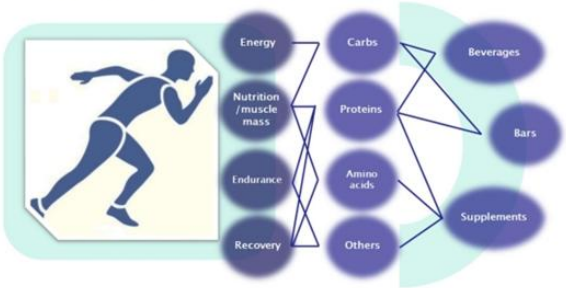
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Sample report pages

1. SUMMARY

The world of performance nutrition



Sports nutrition products fall into the lifestyle trends of health and wellness encompassing various factors such as the consumer demand to lead a healthy life, which fits their active lifestyle, supports beauty and body performance and, in the ideal case, is also environmentally friendly. The industry's response to this global trend was the development of completely new products, composed partly of new ingredients or new formulations and partly by promoting existing products under a different label and image, addressing the emotional desires of consumers.

Ingredients such as carnitine, carbohydrates and proteins have multiple functions within the same product matrix making positioning a complex affair

Prices have remained stable for these ingredients

Giract understands that prices will remain stable for most of the plant proteins till 2020 while it remains to be seen for the other ingredients

New formats, flavors, scientific data and an increase in consumer awareness are driving the overall market for performance nutrition products

Organoleptic properties of some ingredients, labeling issues, ad-hoc controversies and intra competition between ingredients are some challenges for the ingredient industries in this space