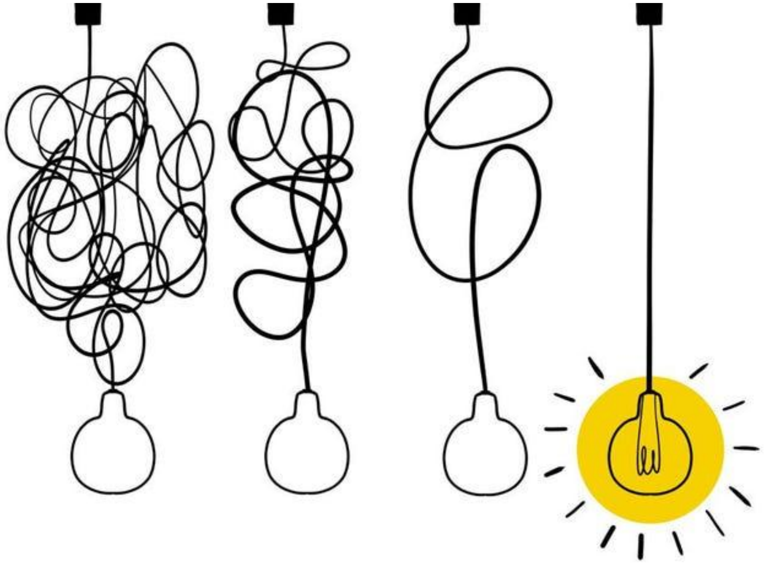
2025 and beyond

What next, where next in Active Nutrition

Oct 2024

Nutrition INTEGRATED

Evolution not revolution



Active nutrition has never been so competitive. Categories are evolving, brands are democratising and new products are launching every day. And all against a backdrop of challenging macroeconomic conditions.

So how do you cut through the noise? The answer lies in taking a deeper look beyond the trends that we're all familiar with to really understand what they mean and consider their role and relevance.

The active nutrition landscape

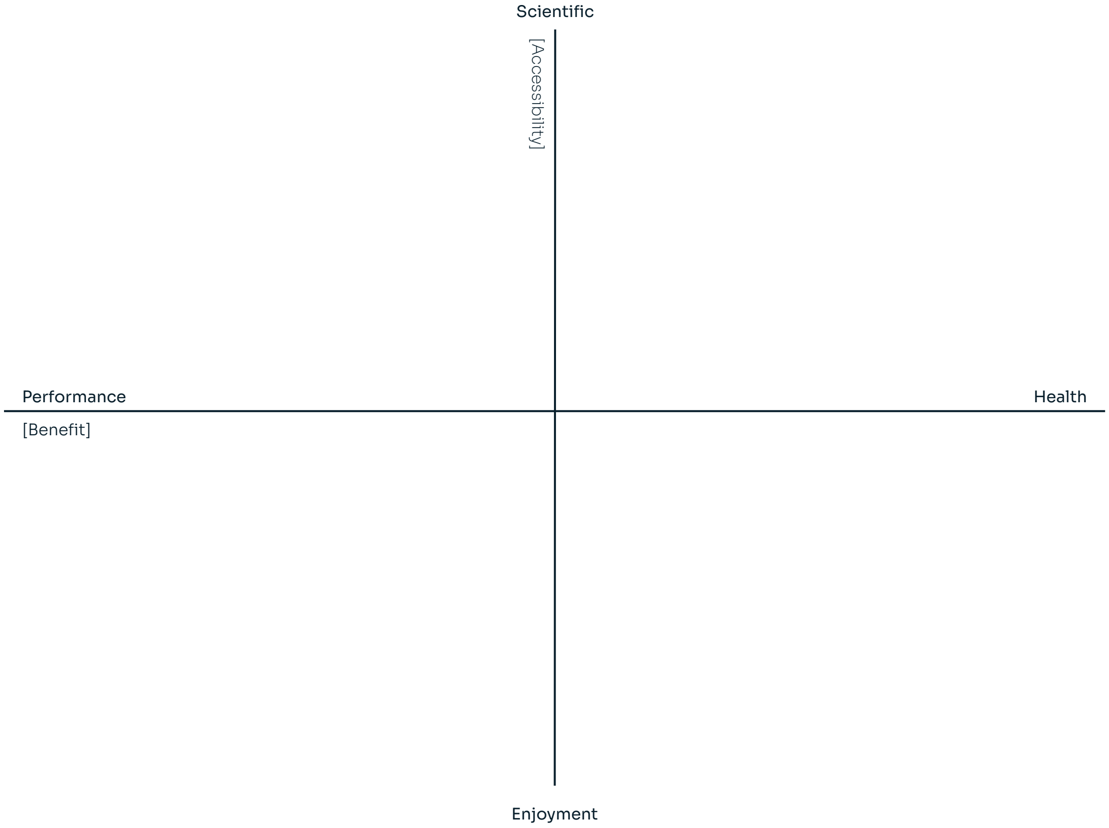


Figure 1. The Active Nutrition landscape

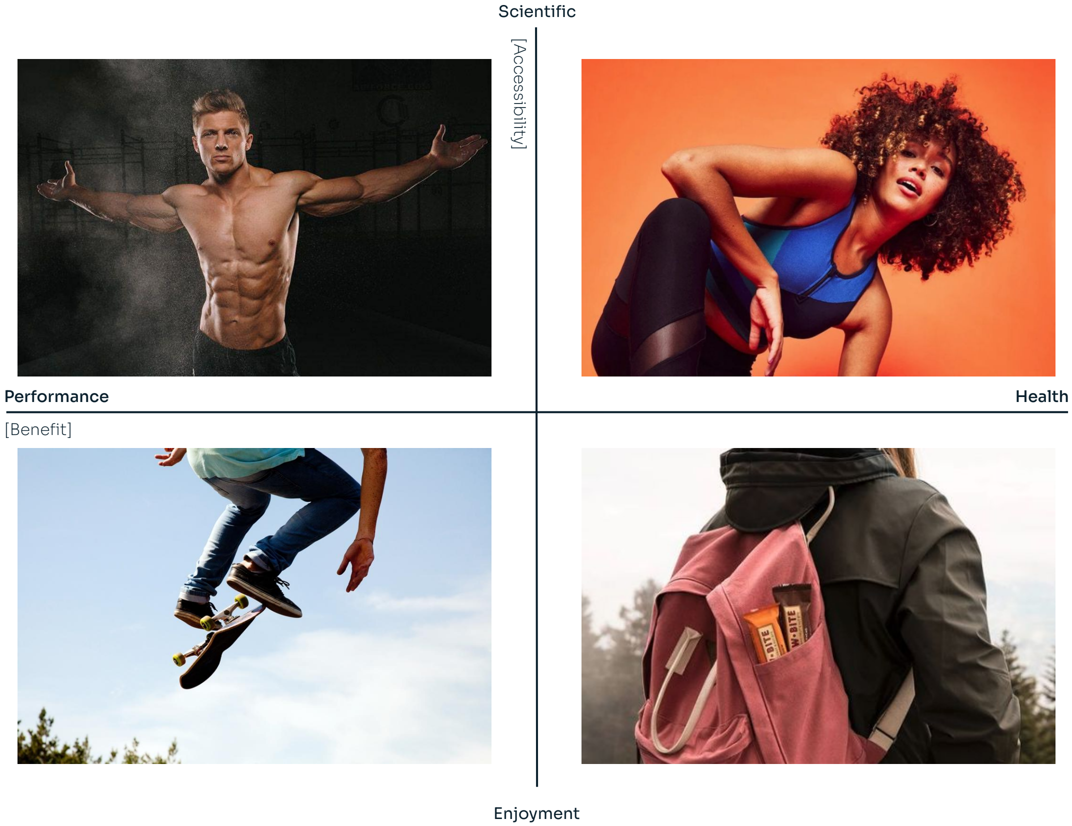
 # Performance refers to the consumer that wants to be better in the gym. Products consumed before, during and after exercise.

 # Health refers to the consumer that is not fuelled by a desire to push boundaries but to fuel personal change and improve health.

 # Scientific refers to the importance of science and proven ingredients. Format is typically supplementary, whilst the niche audience ‘cares’.

 # Enjoyment is more emotional comms. Format is more convenient, taste is crucial and products are more “foody”. More people ‘care’.

The active nutrition landscape



#TL - The original domain of *sports nutrition*. Products focused on improving performance, consumed before, during and after exercise.

#TR - A vibrant world of *functional nutrition*. Products that improve health (body and mind; “wellness”) and promoting agelessness.

#BL - *Everyday Energy*. Products focused on providing energy (mental and physical) to keep you going throughout the day.

#BR - *Convenient food and snacks*. Products that are a better for you and healthy alternative to everyday snacking and daily food choices.

Figure 2. The Active Nutrition landscape

A stable blueprint

Online Navigation [shop by...]

INGREDIENT
- Vitamin C
- Collagen
- Curcumin
- ...

DIET
- Vegan/Plant
- Natural
- Gluten free
- ...

CONCERN (NEED)
- Immunity
- Joint
- Skin
- ...

GENDER/AGE
- Male
- Female
- Age (50+)
- ...

CATEGORY
- Sports Nutrition
- Inner Beauty
- Weight Mgt.
- ...

FORMAT
- Capsule
- Powder
- Gummies
- ...

GOAL
- Gain muscle
- Lose weight
- Stay healthy
- ...

The active nutrition architecture is well defined.

The future is about doing the same thing, but differently.

Figure 3. Master blueprint to active nutrition

The new reality

Blurred vision

Where does one category start and another stop?

The lines between categories are increasingly blurred increasing the breath of competition whilst also challenging brands on their own purpose and permission.

Generational shift

Whilst consumers are defined by usage & behaviours, many categories remain stereotyped by age.

How does a brand remain relevant to a new generation of consumers and/or the legacy generation of consumers? Can they do both?

Impact of AI

Technology is changing the way we shop, the way we engage and even what is available.

Artificial intelligence is influencing awareness, decision making, and knowledge? But will it help us to make better decisions?

Trends are ultimately a response to the primary dynamics of a category.

The category is bigger, less defined and with an 'informed' opinion at the touch of a button.

Figure 4. The macro dynamics influencing active nutrition

2024 and beyond

Brand & Product

- Redefine & reimagine
- Breaking the taboo
- Need connectivity
- Surprisingly familiar
- Product & beyond

These trends underpin all next gen brands. And they should define you.

Category, Population & Need

- Generational energy
- Mind > Body
- Agelessness
- Digital impact
- Foundational health

These trends define where to focus proposition and build expertise.

Figure 5. Ten trends that shaped 2024

2025 and beyond

Brand & Product

- Innovation x communication
- Specialists vs. generalists
- Back to basics
- The birth of originality
- Substance behind the logo

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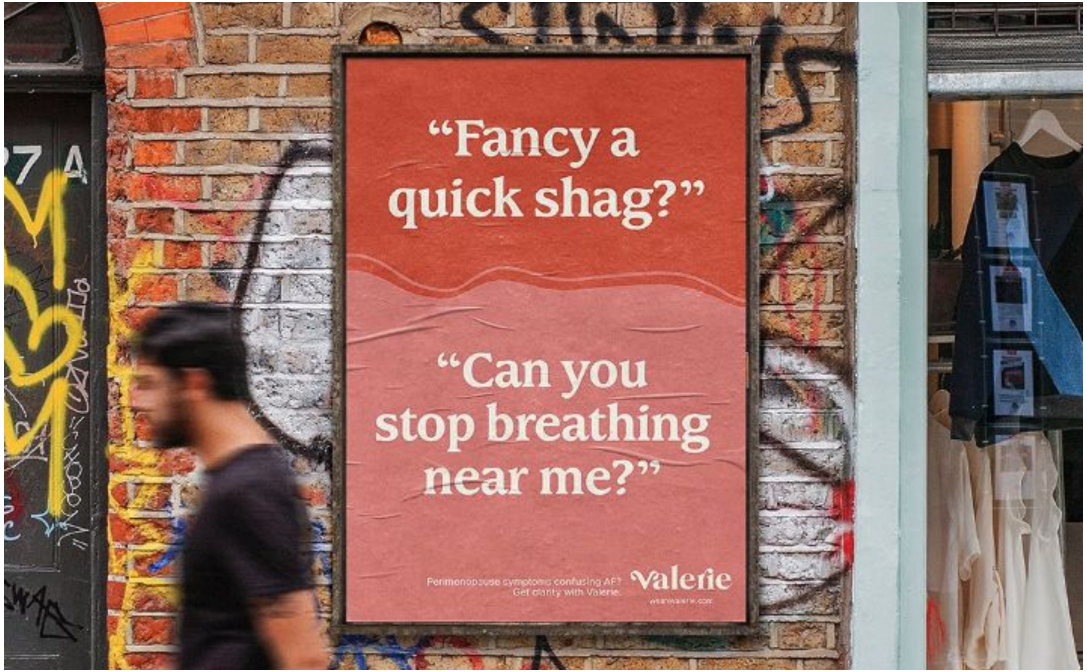
Category, Population & Need

- Health hacks
- Performance 2.0
- Recovery redefined
- Root cause
- A parallel universe

These trends define where to focus proposition and build expertise.

Figure 6. Ten trends shaping the future of active nutrition in 2025

Innovation x communication



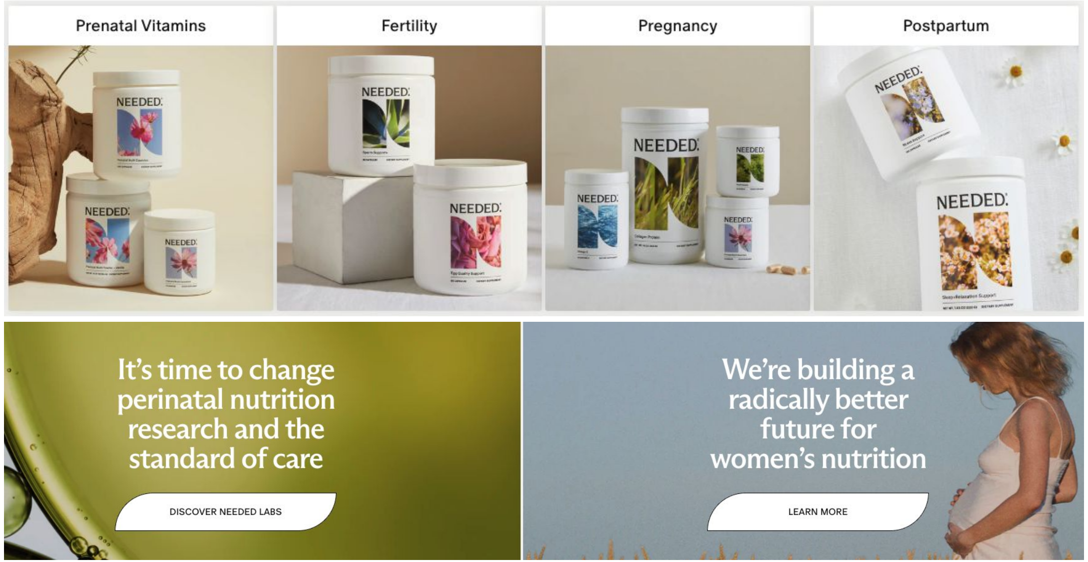
Product categories are increasingly homogenous in terms of ingredients and claims. Or new technologies are hard to explain.

Brands have to work harder to communicate their message and stand out from the crowd. It has to be more than just product attributes.

Influencers, AI, collaborations, partnerships, and messaging that continues to break the taboo is fundamental. The *art* of the science.

Figure 7. Cutting through in creatine, fermented whey, plant protein and women's health.

Specialists vs generalists



\# Brands are creating platforms or are building expertise around one platform.

\# In effect, the difference between *owning something* versus *offering everything*.

\# Brands can own a population, a product type, a need, a technology or an ingredient.

Figure 8. Owning fertility with Needed

Back to basics

The disruption of specialists is causing brands to focus on what their good at.

It doesn't mean 'same old', more so innovation on core products, less so new products.

The case of Care/of, acquired by Bayer, reflects the challenges of personalisation.

Whilst personalisation wrestles with frontend execution, the daily (all in one) essentials fly.

Figure 9. The new formulation of Cellucor C4 (L) | Example range of Care/of products

The birth of originality

FMCG categories are defined by brands the are fundamentally unique.

Active nutrition categories are defined by brands that are *very* similar.

Originality has never been more important, and one interesting area is flavour.

Originality can be many more things - legacy, collaborations, packaging to name a few.

Figure 10. Originality with Precision Hydration, Bloom and Rootless

Substance behind the logo

Consumers don’t want clean labels, they want ‘cleaner labels’.

It is intuitive that consumers will want more natural and sustainable products over time.

It is not a binary discussion. It is about choice and a drive to make the best products possible.

Whilst brands wrestle with cost and impact of change, it is a collective responsibility.

Figure 11. Cleaner products with Wild Nutrition and ALL Real

Health hacks

Figure 12. Hydration, mushrooms and collagen health hacks

For a long time, personalisation has been put forward as the future. It might yet be.

In the meantime, consumers have been focused on their high impact daily essentials

The evolution of the daily essentials is the integration of nutrition and behaviours.

Simple and effective health hacks that can make a tangible difference with less impact.

Performance 2.0

Performance continues to evolve, whether circadian rhythms, or hybrid endurance.

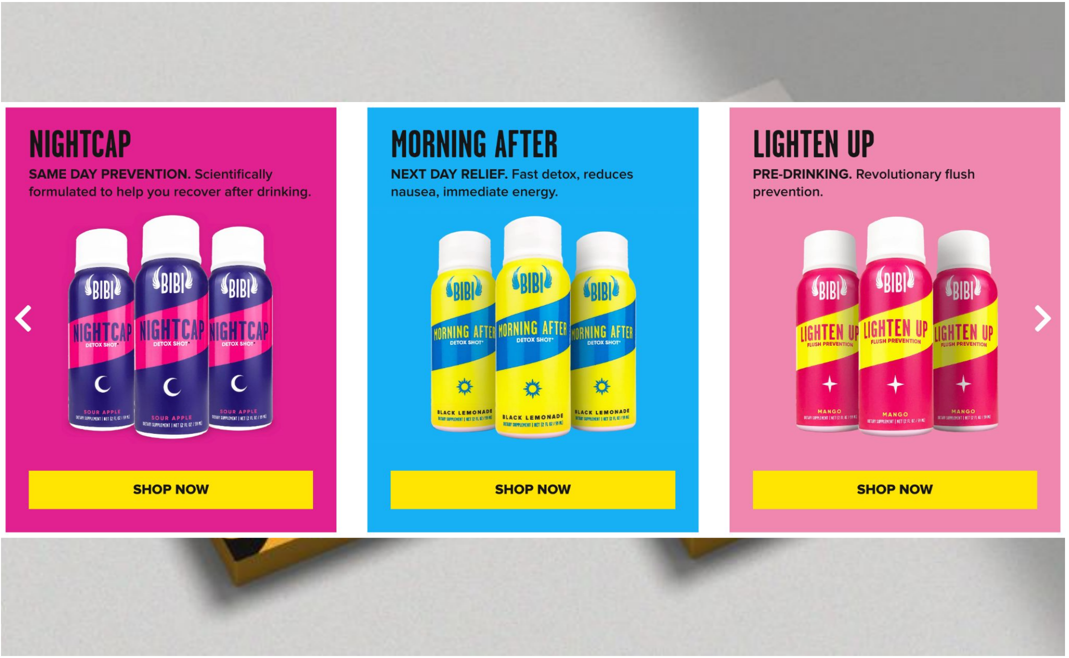
Even energy drinks have adopted the proposition of performance.

But performance is relative, and can mean different things to different people.

Performance is no longer a sporting concept but an everyday lifestyle ambition.

Figure 13. Next generation performance with circadian rhythms, hyrox, energy drinks and... chocolate

Recovery redefined



Overnight recovery is one of those areas that feels untapped despite obvious relevance.

However, overnight recovery - or ‘detox redefined’ is gathering pace.

Aligned to performance, it is conceptually about consumers maximising life.

It initially feels like a younger generation proposition, but it’ll evolve for all ages.

Figure 14. Tipple hangover cure and Bibi beverage redefining detox shots

Root cause

We've previously discussed the importance of agelessness as the overarching concept.

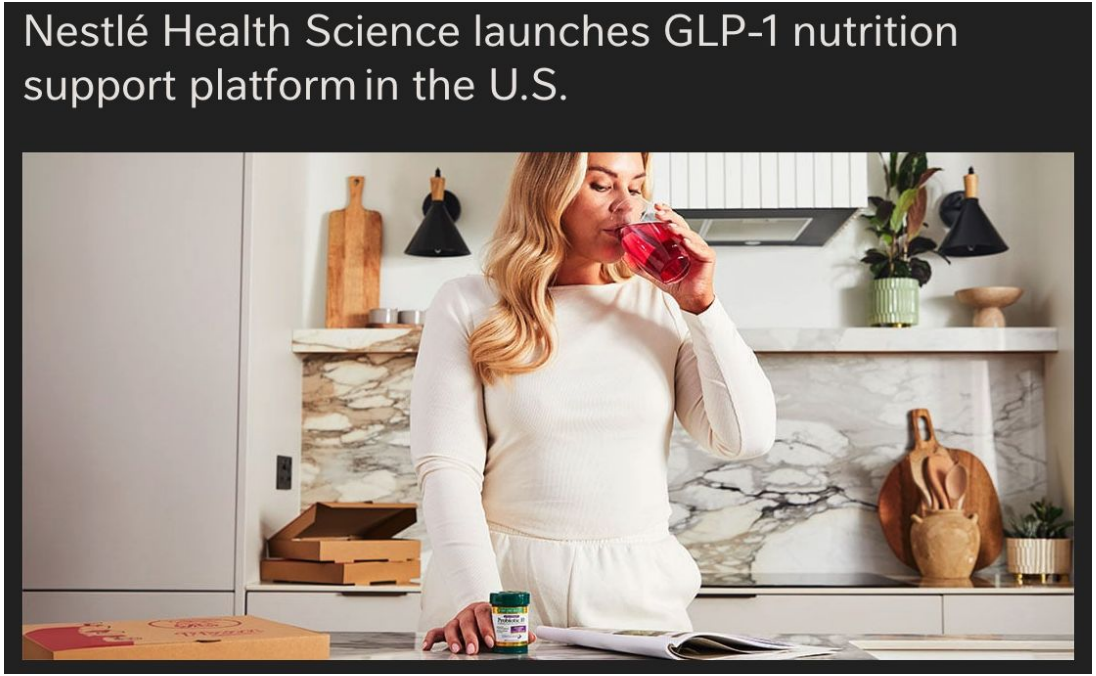
The evolution of this proposition is for consumers to seek the root cause.

Cellular health is our trend hero, and it might only cost €1,000 for a starter pack.

Within this space, plant extracts continue to win as solutions that are found in nature.

Figure 15. Cellular health and inflammation with Clinique la Prairie and Kurk Life

A parallel universe



"The number of people on GLP-1 weight loss therapies is growing, and Nestlé Health Science is uniquely positioned to support their changing nutritional needs," stated Anna Mohl, Chief Executive Officer of Nestlé Health Science. "We have brands and expertise across our portfolio to support needs that can include preserving lean muscle mass, managing digestive upset, supporting an adequate daily consumption of micronutrients, and more. *Along with women's health and healthy aging, GLP-1 companion products are a key solution that we're focusing on.*"

This is proteins next consumer - a driver for protein water and protein shots.

Figure 16. The next generation protein consumer

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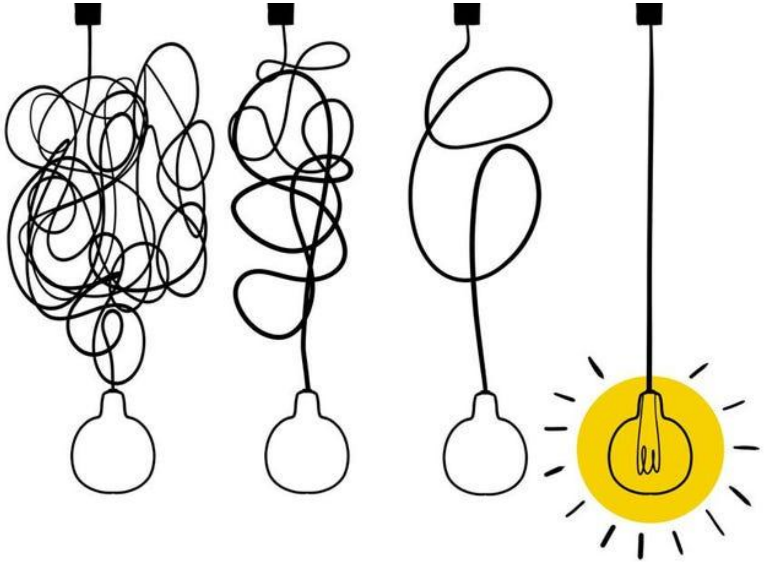
Figure 17. Ten trends shaping the future of active nutrition in 2025

To summarise



Too often we synonymously approach trends with question “what’s new”?

Instead we need to ask “what’s changed” or “what’s evolving” or “what’s redefining” itself.

Ultimately, the landscape of products, needs, ingredients and formats is well defined.

Winning is interpreting how this landscape best suits the needs of consumers today.

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