

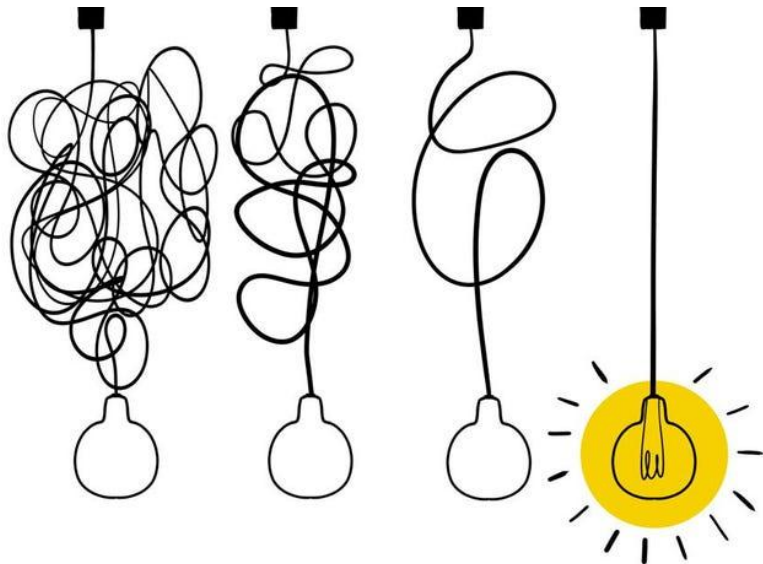
2026 & beyond

*What next, where next in Active
Nutrition*

October 2025



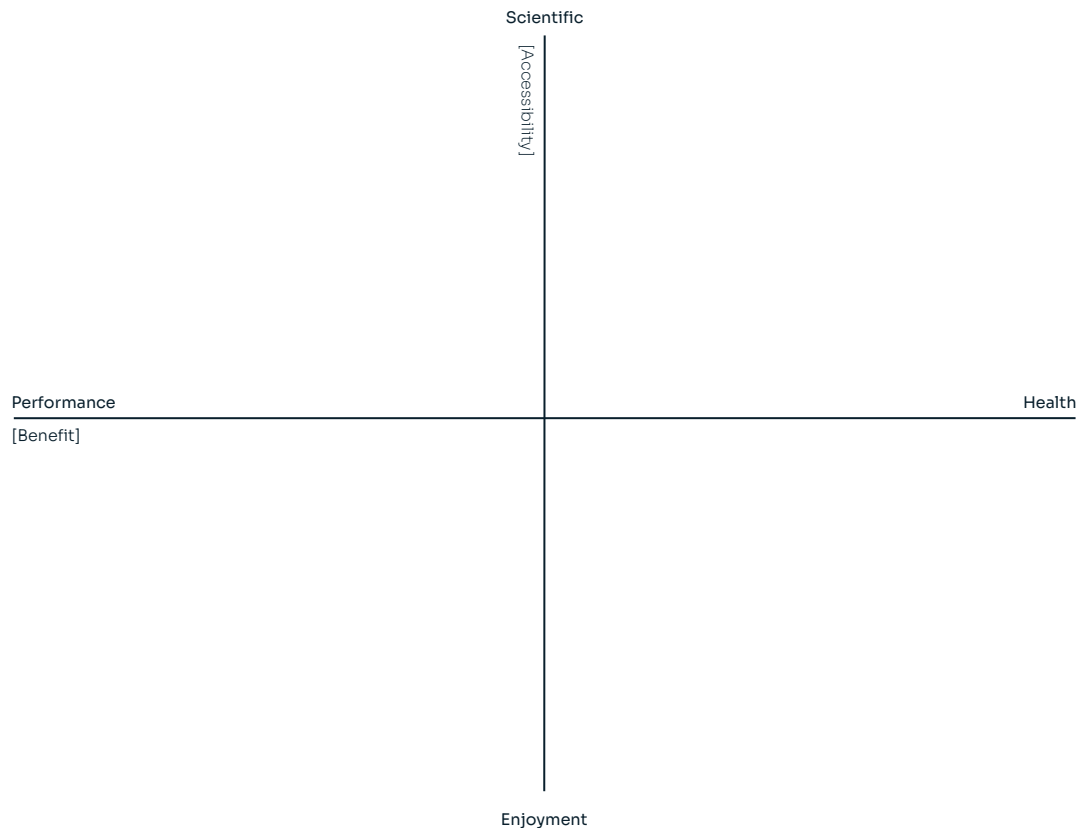
Trends done *differently*



It has never been so competitive. Consumers are *changing*, categories are *evolving*, brands are *democratising* and new products are launching every day. All at a time 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



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

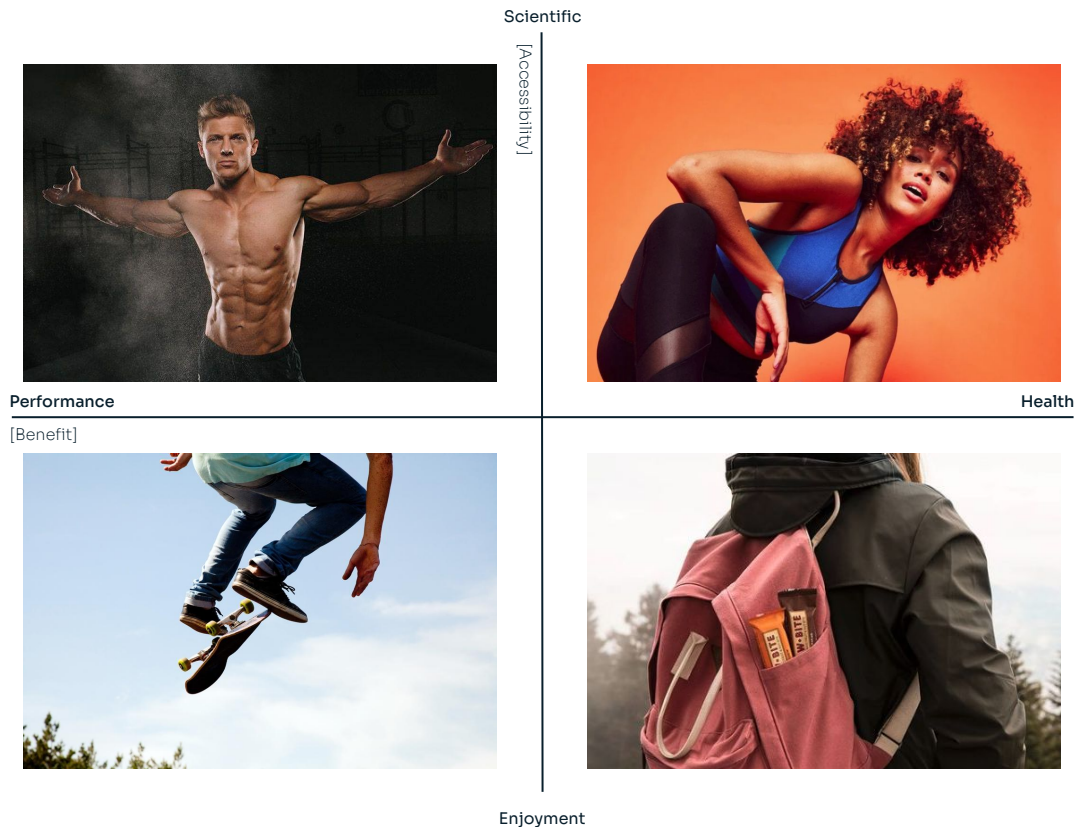
Health refers to the consumer that is not fuelled by a desire to push boundaries but to fuel personal change and improve health.

Scientific refers to the importance of science and proven ingredients. Format is supplements, 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'.

Figure 1. The Active Nutrition landscape | The framework

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 | Category lens

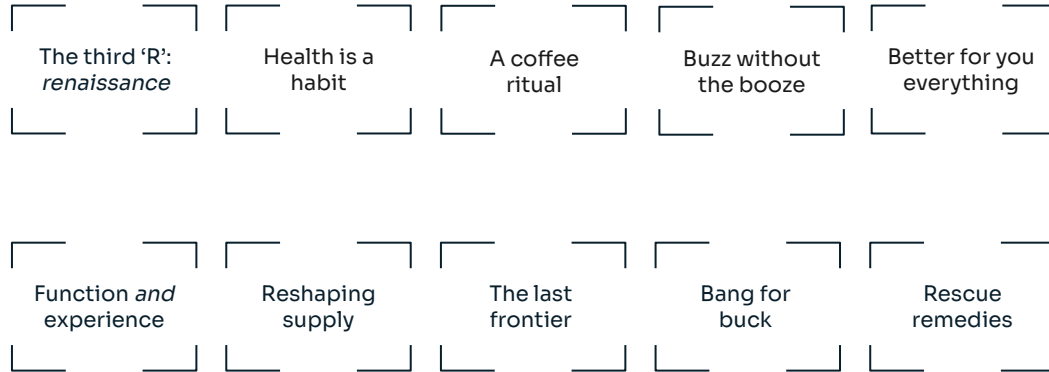
The rules of the game



Remember. Our trends are not meant to be literal. They are meant to stimulate what you should *learn*, where you could *adapt* and what potential *evolution* you may want to drive.

What do you see?

2026 and beyond



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What do you see?

Learn, adapt & evolve

01. The third 'R': *Renaissance*



Weight Management | YouTheory [US]



Creatine | Puresport [UK]

It started with redefine and reimagine, now we have renaissance.

While the footprint of the active nutrition industry remains stable with ingredients, needs and populations largely unchanged, innovation is thriving. But much of what's driving progress today isn't entirely new. It's the familiar, reframed through the lens of 2026 and revived for today's consumers.

*Redefine: a new definition, purpose or meaning (e.g. non animal whey)

**Reimagine: to envision something in a different way (e.g. protein bars)

The renaissance of *weight mgt.*

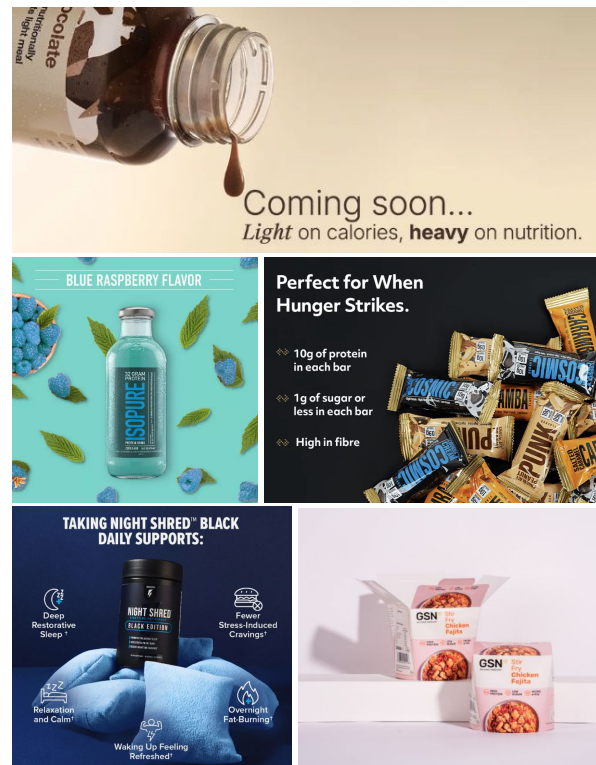
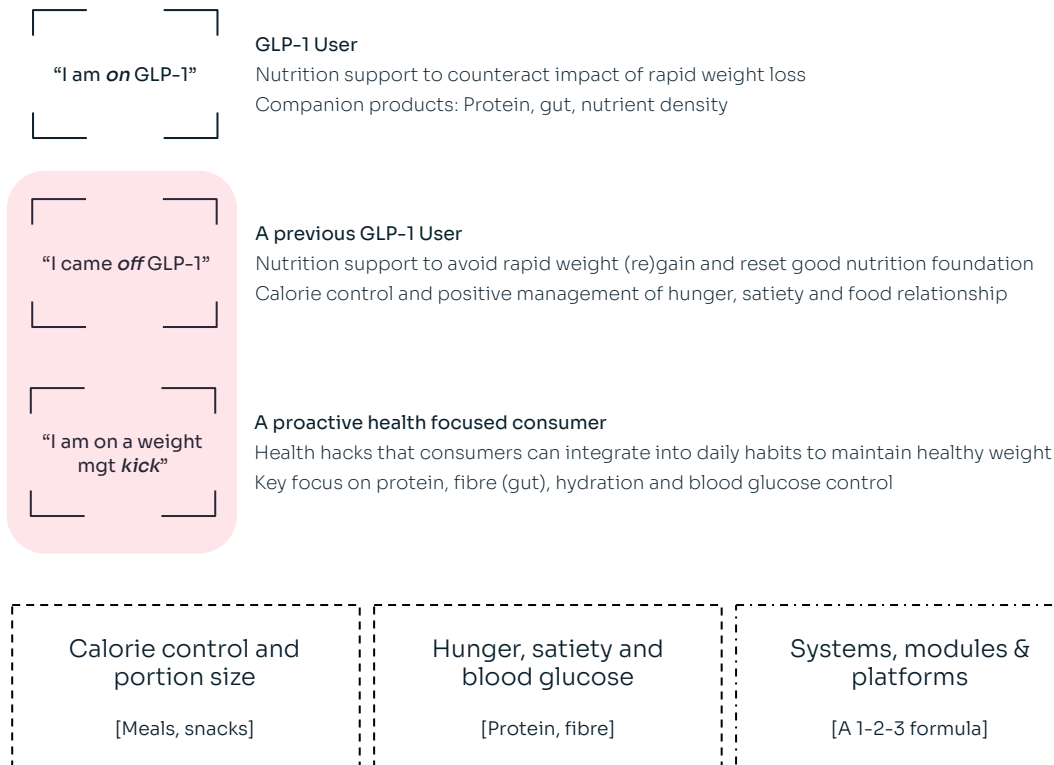


Figure 6. A basic approach to consumer groups based on GLP-1 [Top] | New innovation [R] | Opportunity areas [Bottom]

The renaissance of *creatine*

Category	Products	Competitor Branded	High Dose	Low/Unknown Dose
Creatine	(2,149)	479	2,084	
Creatine Plus	(61)	4	18	42
Electrolyte	(20)	5	5	15
Pre Workout	(569)	92	128	418
Protein Bar	(13)	3	5	8
Protein Powder	(239)	33	72	160
Total		616	2,312	643

3,051 Products

We are already tracking 124 creatine gummies

create

Creatine Monohydrate Gummies

Convenient, Delicious, and Effective – The Perfect Addition to Your Fitness Journey!

Less Sugar Gluten-free Non-GMO

New populations

New benefits

New formats

Figure 7. A creatine product landscape [Top] | Creatine products emphasising new populations, benefits and formats

02. Health is a *habit*



Hydration | Waterboy [US]

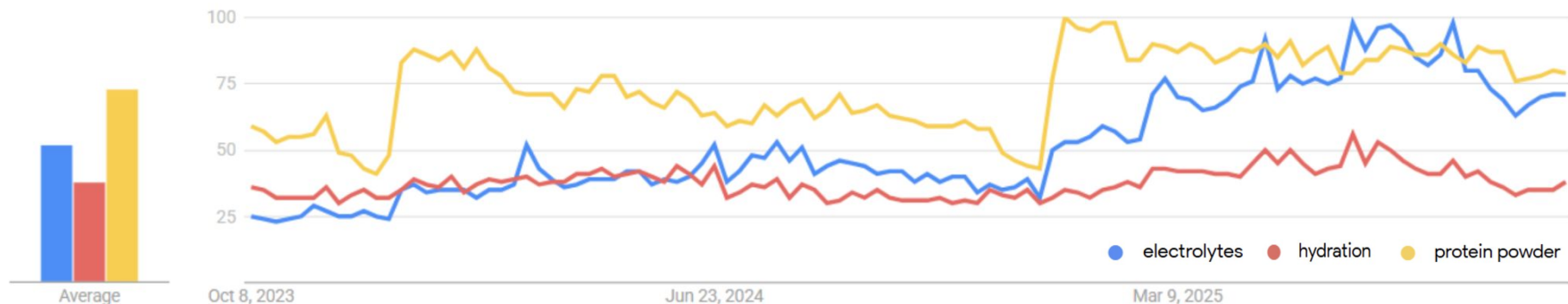


The 'booster' | Bimuno GOS [UK]

Becoming part of a consumer's daily routine is harder than it sounds.

Habits take time to form and supplements can easily be forgotten, left on the side in the best of intentions. But what if the habit already exists? Then the innovation opportunity shifts from building entirely new routines to enhancing and boosting existing ones.

Hydration is a habit



The charts use Google Trends data to show how interest in the terms 'protein powder', 'electrolytes', and 'hydration' has changed over time in the UK. The values represent relative, not absolute search popularity on a scale from 0 to 100. Each term is measured against its own peak search volume. An upward trend indicates growing interest relative to its peak, while a downward trend reflects a decline in comparative search activity.



Waterboy leverage a generational / consumer centric approach to hydration with daily, workout and weekend recovery.

Drywater, enhance the hydration habit beyond electrolytes and differentiate based on the latest buzz *cellular* hydration.



Figure 9. Hydration is a habit that consumers have decided should be more functional

A daily habit *boosted*

Boosting the hot drink



Catalyst electrolyte coffee [US]



Baia functional creamers [ES]

Boosting the food



Greenora [UK]



More [DE]

03. A coffee ritual



Coffee [Breakfast] RTD | Soylent [US]



Could this trend be *protein & energy* | Premier [US]

Coffee is much more than a daily habit; it's a ritual, a non-negotiable for huge swathes of the population and subsequently, it's where nutrition has pinned its hopes.

From MCTs and the days of Bulletproof to collagen, mushrooms and now protein, making coffee a perfect partner is a surefire way to embed an innovation.

A protein coffee

The advertisement is divided into three main sections. The left section shows a white and blue bag of 'bulk' Iced Latte Whey Protein Coffee, a glass of iced coffee, and a white shaker bottle with the 'bulk' logo. The middle section features a man drinking from a glass of coffee, with text 'START THE DAY STRONGER' and 'Whey Protein Coffee'. Below this, a table lists nutritional information: 17g PROTEIN and 107 CALORIES per serving. The right section shows three panels of coffee: Iced Latte, Iced Mocha, and Iced Caramel Latte, with the text 'MADE WITH BRAZILLIAN ROASTED BEANS' at the bottom.

bulk

Iced Latte
WHEY PROTEIN COFFEE

17g PROTEIN 107 CALORIES

**PURE COFFEE.
PURE WHEY PROTEIN.**

START THE DAY STRONGER
Whey Protein Coffee

PER SERVING

17 ^g PROTEIN	107 CALORIES
----------------------------	-----------------

Iced Latte Iced Mocha Iced Caramel Latte

MADE WITH BRAZILLIAN ROASTED BEANS

Whey Protein Concentrate (Milk), Skimmed Milk Powder, Instant Coffee, Flavoursings, Thickeners (Guar Gum, Xanthan Gum), Emulsifier (Sunflower Lecithin), Sweetener (Sucralose).

[500g \ 1000g] £29.99 / kg | €34.74 / kg

Figure 12. Bulk have recently added a Protein Coffee to their portfolio

Coffee as the vehicle to function

01. Protein Coffee or directly impacting the coffee



02. Replacing the coffee, or is could be anything to consume with coffee



More coffee
collaborations

[Quality familiarity?]

A driver towards more
protein & energy

[Clear RTDs]

From coffee to tea, or
already... *Matcha*

[Healthier coffee ritual]

Hot drink ritual
platforms

[Beyond the drink]

Channel & availability
dynamics

[Foodservice / Out of home]

Figure 13. How nutrition is integrating with coffee and the coffee occasion or replicating the coffee benefit

04. The buzz *without* the booze



A direct No & Low equivalent | Real [UK]



Blurred lines – what is a No & Low drink? | Trip [UK]

As younger generations take a different approach to alcohol, what began as low and no alcohol alternatives has become something much bigger with consumers searching for the same sense of buzz, calm or connection, minus the alcohol.

It's no longer about simply offering alternatives to alcohol, it's about redefining what it means to drink.

The buzz *without* the booze

We have known that the interest in No & Low alcohol has been increasing for some time, but there is a generational impact here too. Younger populations are growing up without the same context to alcohol. In this instance, all drinks are permissible in the social setting, albeit they must still cherish the *moment*.

>> In a UK survey, 39% of 18-24-year-olds reported that they do not drink alcohol at all, making them “the most sober age group overall”.

>> In Germany, 49% of 18- to 24-year-olds said they do not drink alcohol at all — compared with 41% in the 45-54 age group.



Mother Root

Organic apple cider vinegar, blossom honey, organic ginger juice, ginger extract and chilli extract



Three Spirit [Botanical elixirs]

Organic apple cider vinegar, blossom honey, organic ginger juice, ginger extract and chilli extract

How it feels

—

Choose your mood and moment. Enjoy euphoric feels from guayusa and schisandra in Livener, connected bliss with cacao and lion's mane in Social Elixir, and wind down with terpenes in Nightcap.

How it tastes

+

How to drink it

+

What next?

Mushrooms are already prevalent in mood drinks positioned towards No & Low. Cocktail collaborations, mixers, tonics, concentrates. Or any functional drink.

An RTD opportunity (in can format)

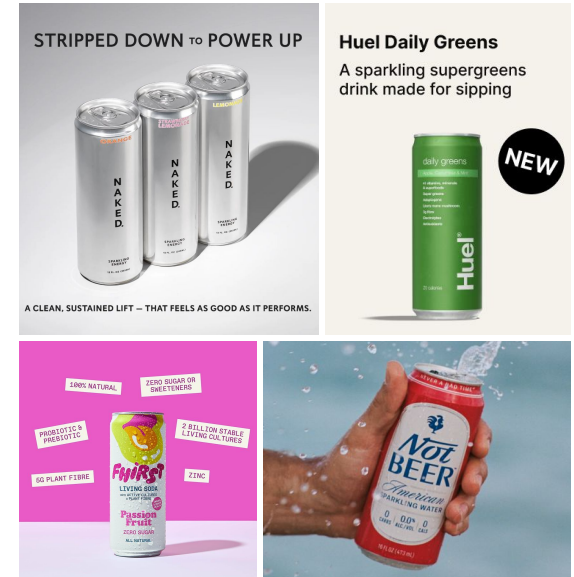


Figure 16. Drowning in functional drinks | Energy, Electrolytes, Greens, Protein, Fibre

05. Better for you everything



Protein sprinkles | Sprinkle Bites [US]



Hydration Cordials | Body Armour [AU]

Protein has been a buzzword – and buzz ingredient – for longer than anyone expected. It's proliferated in every possible format and aisle, becoming a surrogate for health itself.

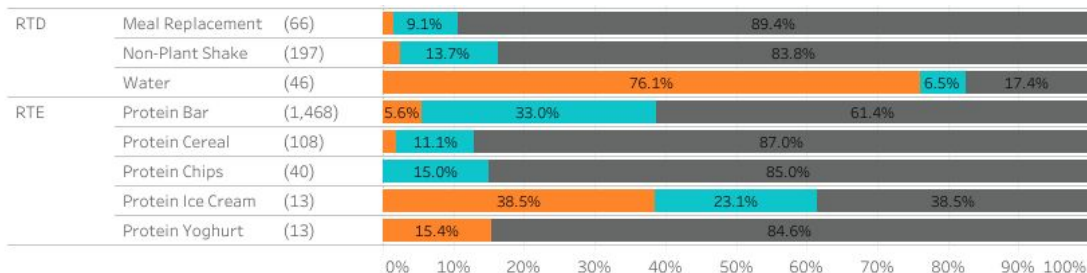
In doing so, it's set the precedent for better for you everything and created a blueprint that other functional ingredients are already starting to follow.

The proliferation of protein

From *powder*, to *supplements*, to *convenience*, to *everyday food*

Sports

Wellness



Traditional protein RTDs are dominated by milk protein rather than whey protein.

Similarly, beyond powders, the majority of ready to eat formats use protein powders other than whey.

Caveat > As the macro trend for protein increases so does the competition between adjacent categories.

Platforms for function

Dairy | The most functional aisle



Bars | with benefits



Confectionery | with benefits

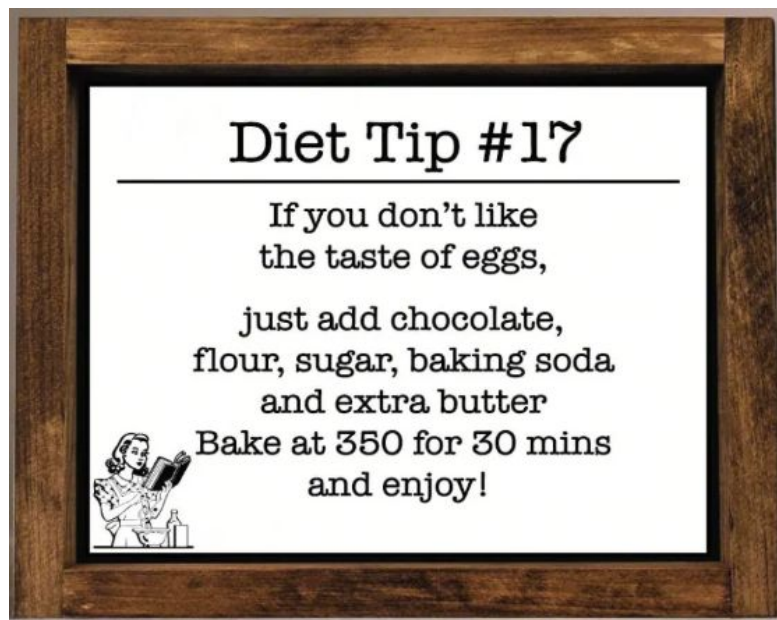


Chocolate | with benefits



Figure 19. The mainstreaming of functional food platforms

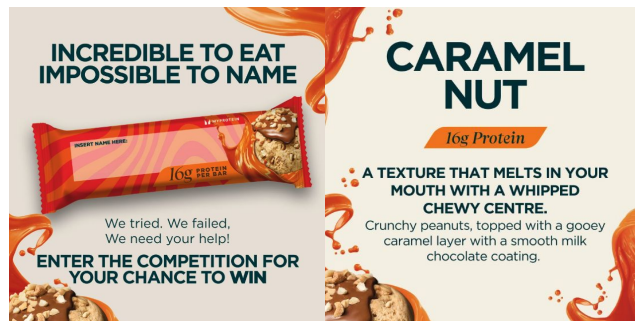
06. Function *and* experience



Function or experience? It's a difficult balancing act and consumers want both.

Products need to have a benefit but in order to drive broader adoption, repeat purchase and brand loyalty, consumption must be memorable. What's inside the product is no longer enough to ensure success, it's about the moment it creates.

Could taste trump nutrition?



	Per 100g	Per Serving
Energy	1653kJ/394kcal	1074kJ/256kcal
Fat	15g	9,8g
of which saturates	9,1g	5,9g
Carbohydrate	41g	27g
of which sugars	10g	6,5g
Fibre	3,1g	2,0g
Protein	25g	16g
Salt	0,95g	0,62g

	Per 100g	Per Serving
Energy	1539kJ/371kcal	462kJ/111kcal
Fat	17g	5,1g
of which saturates	11g	3,2g
Carbohydrate	34g	10g
of which sugars	6,0g	1,8g
Fibre	23g	6,8g
Protein	15g	4,4g
Salt	0,70g	0,21g

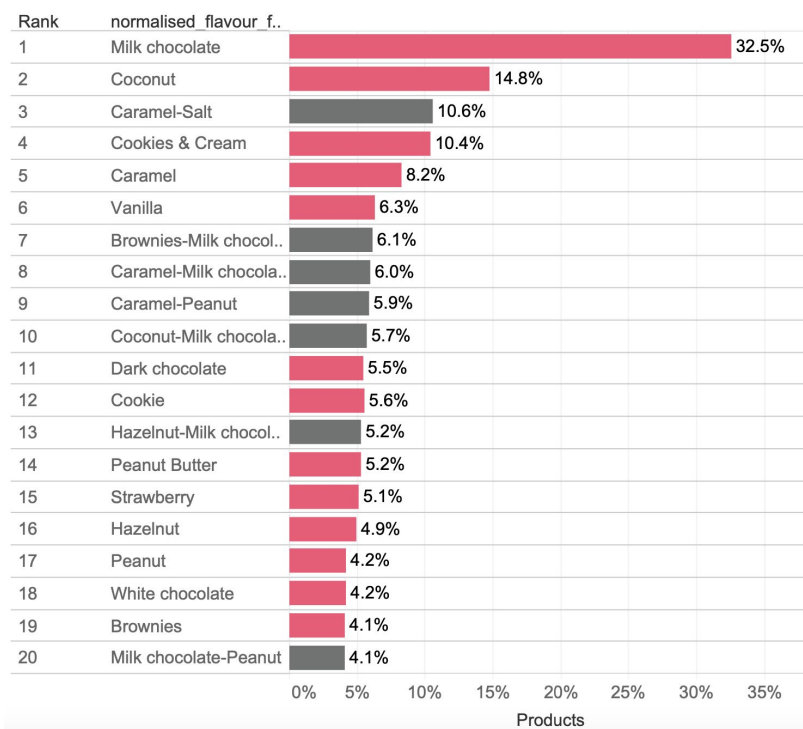


Figure 21. Are MyProtein setting a precedent for a different nutritional benchmarks

A definable protein bar

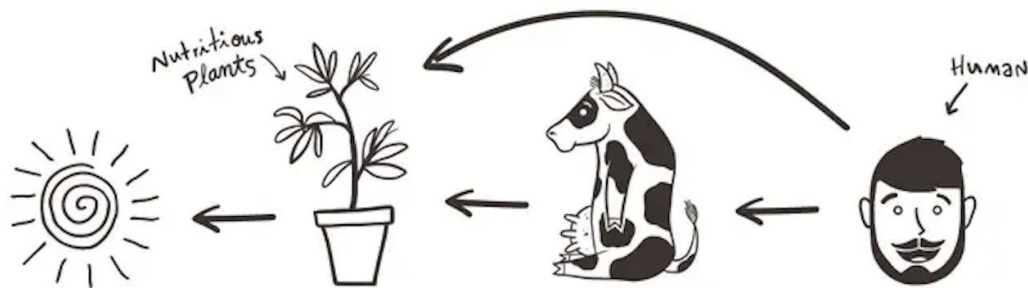


Ghost. Recreating the Twix format. Permissible indulgence



Built. Redefining the (flavour) experience

07. Reshaping the supply chain



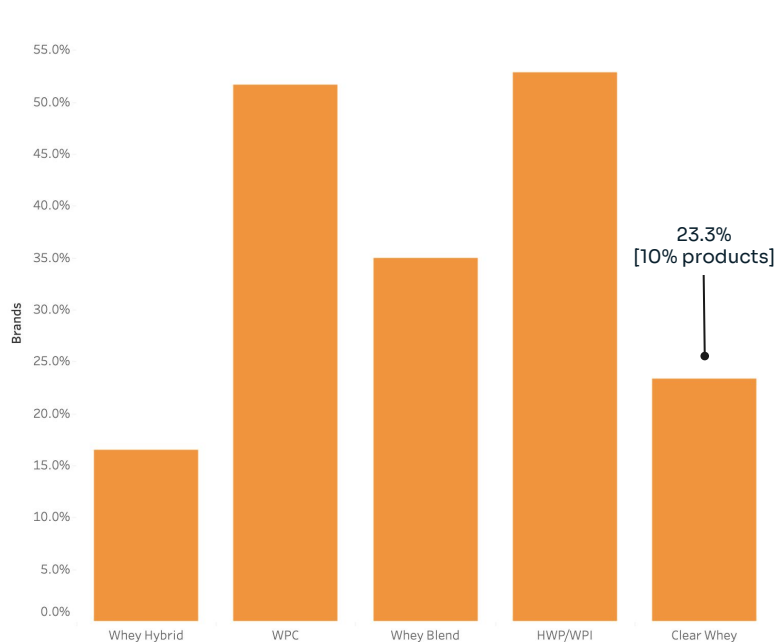
Is the future a world where **nature** powers our nutrition?

To meet both short-term demand and ensure long-term global food security, new sources of ingredients are needed.

Novel approaches that can be decoupled from existing supply chains offer the potential to stabilise supply and avoid price volatility, as well as compelling stories for consumers that add value beyond the ingredient itself.

Where is the clear whey supply?

Europe [~600 brands]



US [~400 brands]

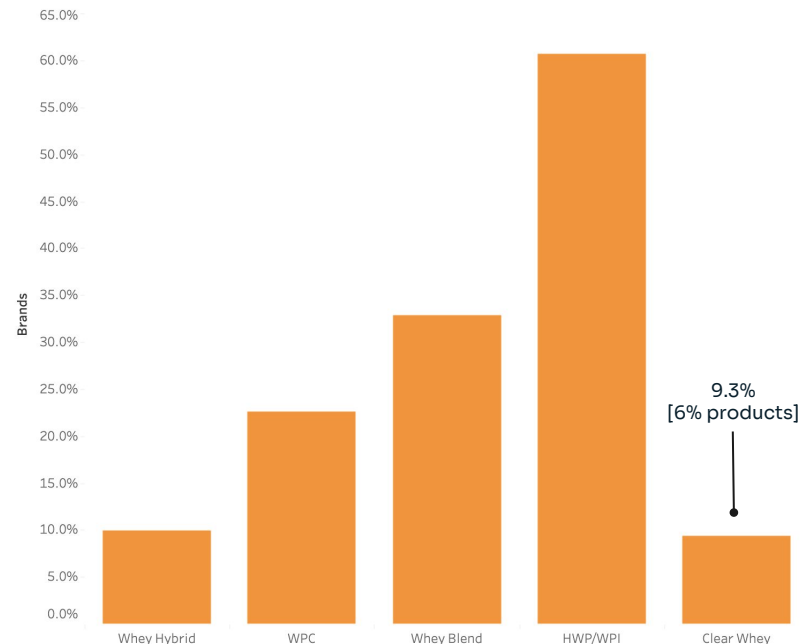
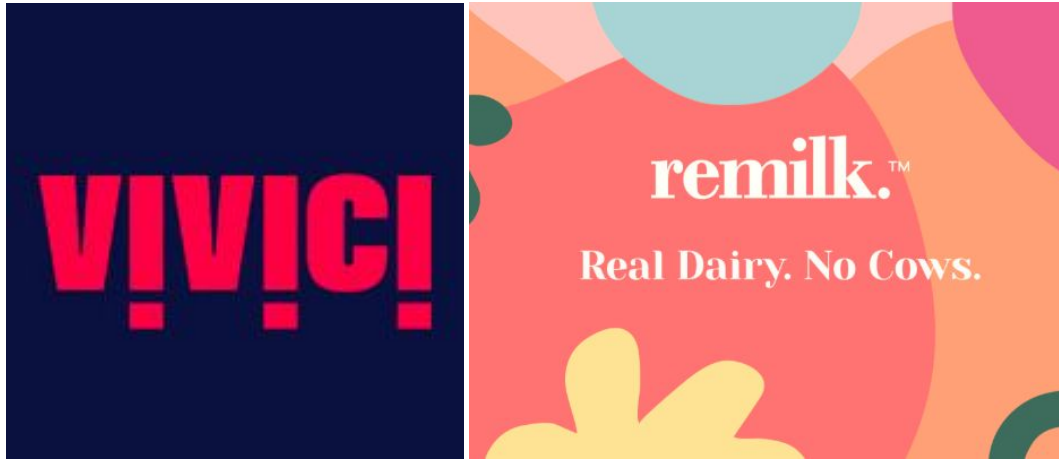


Figure 24. The whey protein architecture distribution in Europe and the US & Canada, based on percentage of brands

Whey from non animal sources



There is a strategic advantage of decoupling the raw material from a volatile commodity dairy market. It provides greater cost control and resilience against market fluctuations.

Fermentation-based solutions could be important in addressing supply chain risks and growing market demand, as there are no infinite whey protein supply”

Caveat >> Price and scalability.
This is good for everyone.

Fermentation facilitation



Fermotein® is a mycelium powder that is minimally processed and naturally high in protein, prebiotic fibre and a natural source of essential micronutrients, including spermidine.

The next generation of highly functional ingredients. Maybe we'll even call it *biomass*.

08. The last frontier of identity politics



What started as extreme biohacking among the wealthy has sparked a societal shift: everyday consumers are now focused on longevity and vitality.

Age has become just a number, no longer something to be feared as the concept of longevity redefines what it means to age well. It's not about living forever, but living in the moment.

A vision of *immortality*

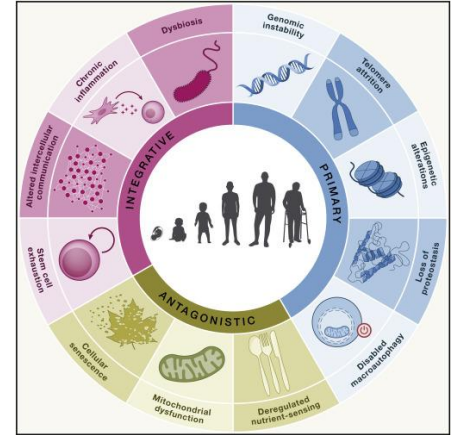


“With the development of biotechnology, human organs can be continuously transplanted, and people can live younger and younger, and even *achieve immortality*,” Putin said via an interpreter to Xi.

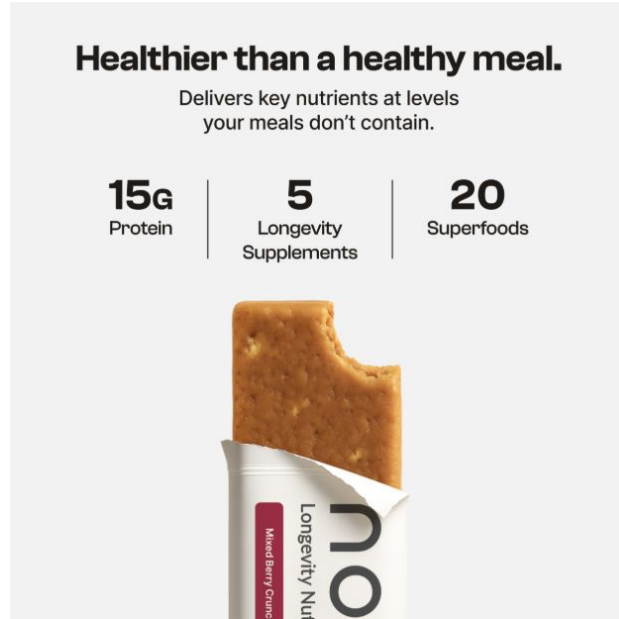
“There’s a chance,” he continued, “of living to 150 [years old].”

As reported by Aleks Krotoski, The Guardian

‘To them, ageing is a technical problem that can, and will, be fixed’: how the rich and powerful plan to live forever.



...and/or living in the *moment*



Developed by top longevity scientists, a renowned dietitian, and a pastry chef formerly of Michelin Three-Star The French Laundry.

The first and only longevity bar — up to 20 superfoods, built-in supplements, and complete nutrition backed by lifespan research.

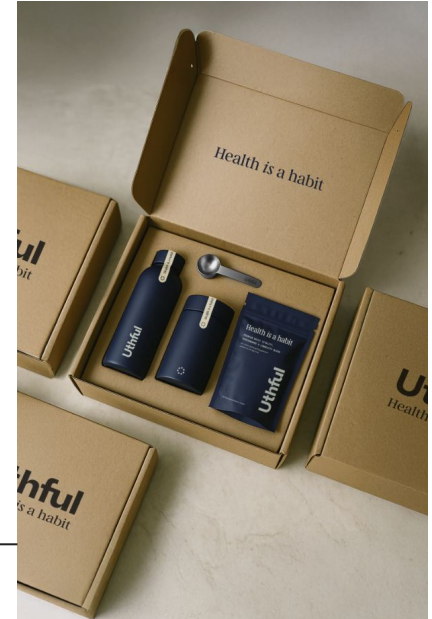
~£2.75 or €3.15 per bar

Uthful is a premium performance, vitality & longevity blend for those wanting to get more from each day.

All the benefits of more than 20 science-backed vitamins and supplements packed into one fuss-free daily scoop.

Uthful's performance and longevity blend delivers complete, expert-formulated nutrition to fight fatigue, sharpen focus, aid recovery, support immunity and metabolism, and boost longevity so you can squeeze the most out of every (busy) day.

Soon to launch



09. Bang for buck

$$1 + 1 = 3$$

As wellness expands so too does the list of supplements competing for attention. But there's a limit to what we can consume and how much we're willing to spend.

To win, brands must offer more complete solutions if they're to become the go-to product when consumers ask themselves: if I only take one supplement today, what will it be?

Category (ingredient) mash ups



Figure 31. Ingredient / category mash up with Harlo and IVB Wellness

A broader lens of offering value

Armra | The breadth of benefits from *one* ingredient



ARMRA
COLOSTRUM

The *Leaders* In Colostrum™


WHY ARMRA?

1 Whole Food.
400+ Bioactive Nutrients.
1,000+ Health Benefits.

ARMRA Colostrum™ is an unrivaled nutrient powerhouse, offering transformational benefits for your body's best health and performance. Strengthen your immune barriers, optimize your microbiome, and empower your body with the blueprint to revitalize health from the inside out.


SUGAR GLUTEN GMOs GLYPHOSATE HORMONES
ANTIBIOTICS SOY FAT CASEIN ARTIFICIAL-ADDITIONS

The Women's Three | Your daily essentials for Performance for Life | Simple, effective, sustainable



Developed with Dr. Stacy Sims and grounded in female-specific research, TW3 delivers Iron, Calcium, and D3 in their most bioavailable forms, formulated for optimal absorption, effectiveness, and purity with every batch NSF Certified for Sport®.

TW3 is Designed To Set A New Standard—The Momentous Standard™
— In Women's Foundational Health.

The Momentous Standard  Our unrelenting pursuit of building the best.

10. Rescue remedies



Gut health | We are Regular



The morning after the night before | AWKN

Not everything in life goes to plan; it's gritty, hard work and the majority of us live it on the edge.

For many people, supplements aren't about helping them be their best selves, but simply a marginally better version of themselves. From hangovers to burnout and everything in between, we're all searching for a little rescue in one way or another.

Life is not perfect



Gut health | We are Regular



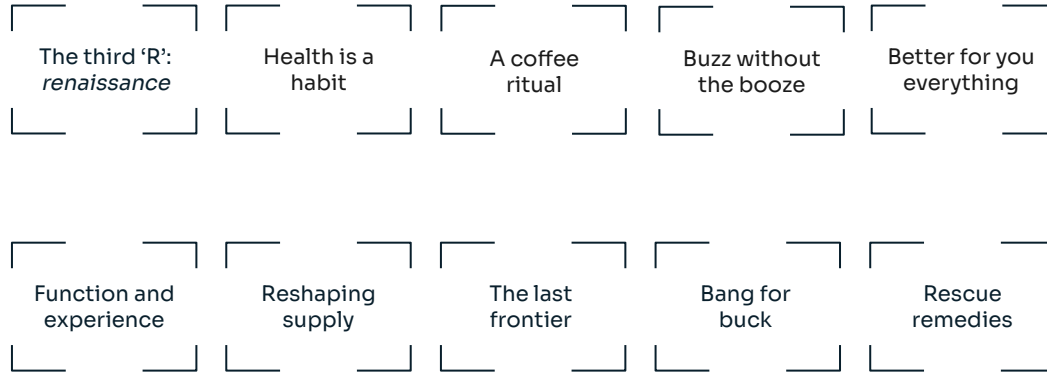
The morning after the night before | AWKN

Combining both mild and moderate symptoms, more than 21% of the EU population experienced depressive symptoms over the two weeks before the survey (European Union).

In 2025, 29% of EU workers reported experiencing stress, depression, or anxiety, indicating a significant concern for mental well-being in the workplace.

In Europe, 46% of women reported feeling tired during menopause.

2026 and beyond



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