

# Creatine reinvented

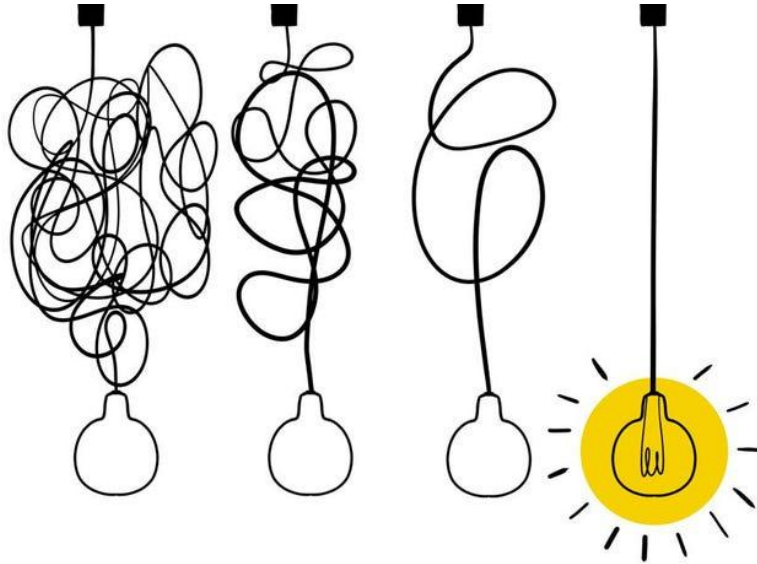
*A life beyond sports nutrition,  
muscle and strength*

Vitafoods | May 2025



# Making sense of the trends

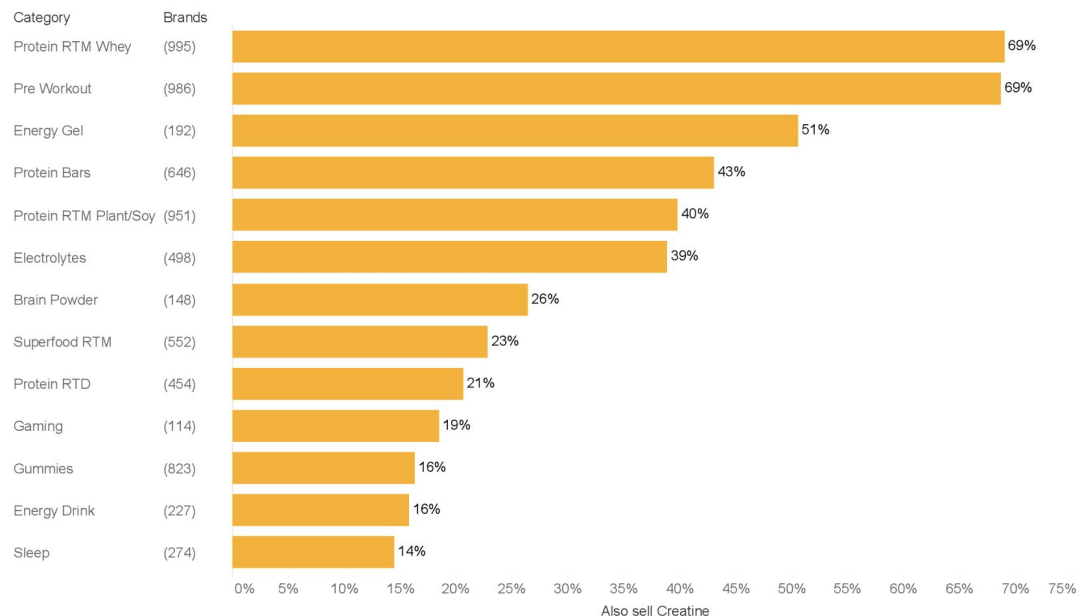
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# The aim of this presentation is to summarise the creatine landscape in Europe.

# Specifically, what are the category dynamics and what is the scope for future innovation?

# Creatine is synonymous with sport



# Creatine is one of the most well recognised and researched ingredients in sports nutrition.

# It is proven to help increase muscle mass and support high intensity exercise.

Figure 2. What % of brands that sell a particular product (e.g. whey protein) *also* sell creatine (all data combined).

# Five primary creatine formats

Powder | Capsules | Gummies | Tablets | Effervescent



# There are five primary formats for creatine, with powder the most widely available.

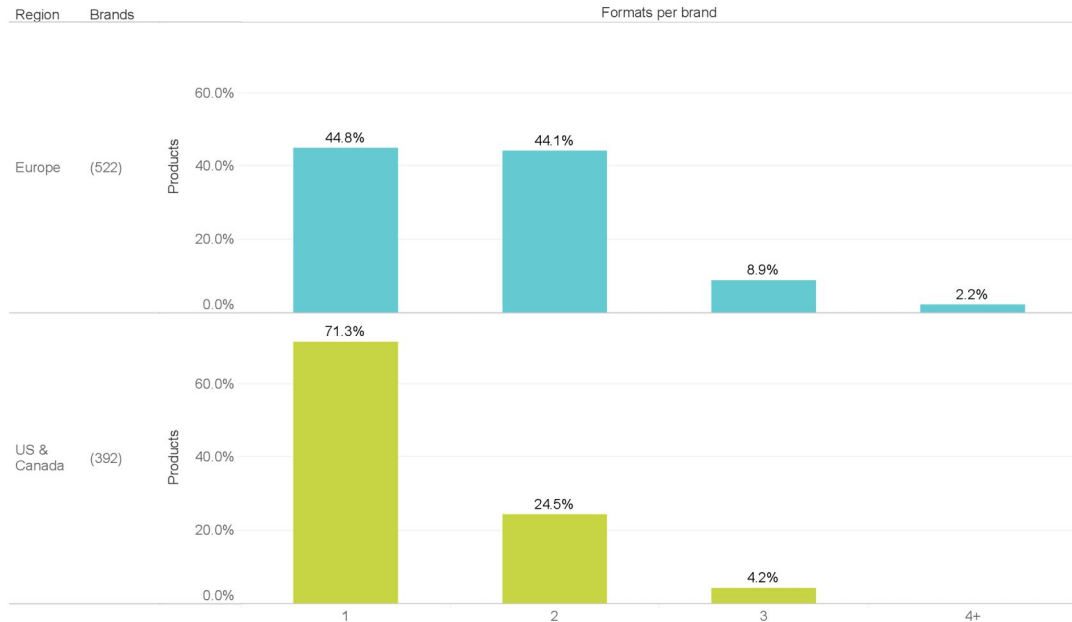
# Presumably this is to do with its versatility and the ability to add creatine to anything.

# Note, tablets have evolved to become more 'chewable' and provide a tastier experience.

# Gummies are a 'new' format, albeit there is debate about product quality.

Figure 3. The creatine product landscape through the lens of format (%s refer to format availability)

# Brands typically sell one or two formats



# A significant number of brands offer multiple formats (56% in Europe and 29% in the US).

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# The dose of creatine is relatively homogenous with 5g in the US and 3g in Europe.

# Only 3.5-4.5% of products (all formats) leverage more than one creatine source.

# Creatine monohydrate is preferred source, i.e. driving 85% of creatine powders available.

# There are exceptions to the rule



Gold Touch



Black Hammer Nutrition



4Endurance

# Creatine types beyond monohydrate are typically based on absorption and/or creating the most comprehensive blend available.

# The challenge with this concept is that there is a breadth of research showing creatine monohydrate works.

# Whether other forms of creatine have good evidence, or not, consumers recognise the benefits and simplicity of monohydrate.

# Creapure is the gold standard

	RTM (649)	Europe Caps/Tabs (253)	Gummy (24)	RTM (390)	US & Canada Caps/Tabs (87)	Gummy (37)
Branded Creatine						
Unbranded	82.1%	77.5%	100.0%	88.2%	85.1%	94.6%
Creapure	16.3%	13.8%		6.7%	8.0%	2.7%
Kre-Alkalyn	0.5%	7.5%			1.1%	
MagnaPower	0.2%	0.8%		1.5%		
CON-CRET				0.5%	3.4%	2.7%
Creavitalis	0.5%			0.8%		
Icreateine				0.8%		
Maxed Creatine				0.5%	1.1%	
Clonapure	0.2%	0.4%				
CreaSyn				0.5%		
CreaZ	0.3%					
PharmaPure				0.3%	1.1%	
NO3-T Creatine				0.3%		

# Creapure is the most available branded creatine, albeit its penetration varies between format and geography.

# Beyond that, there are a few brands trying to establish themselves, albeit without significant penetration.

# Flavour is not a primary dynamic

Region	Format	Products	Flavours per product				
			1	2	3	4	5+
Europe	RTM	(676)	79.3%	6.7%	6.1%	3.4%	4.6%
	Caps/Tabs	(251)	100.0%				
	Gummy	(24)	91.7%	8.3%			
	Chewable Tablet	(11)	72.7%	9.1%	18.2%		
	Effervescent Tablet	(4)	75.0%	25.0%			
US & Canada	RTM	(397)	88.7%	3.0%	4.0%	3.0%	1.3%
	Caps/Tabs	(84)	100.0%				
	Gummy	(38)	81.6%	5.3%	5.3%	5.3%	2.6%
	Chewable Tablet	(4)	75.0%		25.0%		

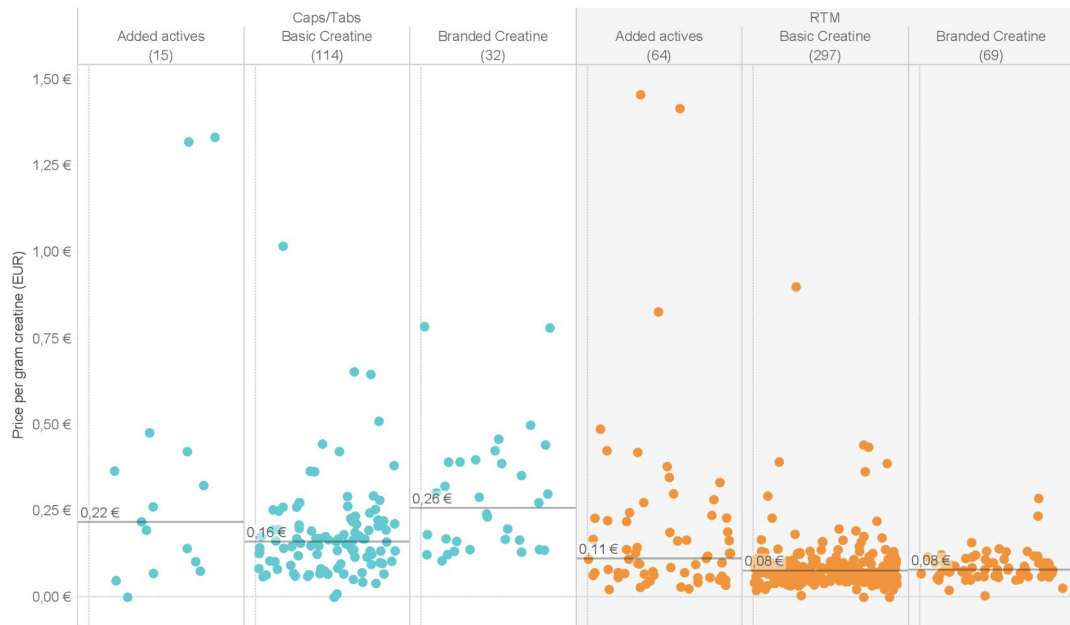
# On the assumption that offering multiple flavour SKUs reflects the importance of flavour, it would seem flavour is not hugely important.

# Currently, less than 30% of products have more than one flavour SKU with ~5% of powders products in Europe offering five or more.

# The majority of creatine sold in powder format is unflavoured, reflecting its versatility to be added to any drink of choice.



# Powder is better value vs capsules



# There is always variation in price, but it is expected that powders would provide better value compared to capsules.

# The price data in capsules shows more clearly a price premium associated with a branded creatine and/or added actives.

# This is not as clear for powders, albeit added actives show sufficient evidence to suggest adding actives also adds cost.

# Creatine in other products

Dataset	Category	Format	Products	Creatine Penetration		Of which branded		Of which Creapure	
Creatine	Creatine	Powder	(742)	<div></div>	100.0%	<div></div>	22.4%	<div></div>	86.1%
		Capsule	(289)	<div></div>	100.0%	<div></div>	31.5%	<div></div>	57.1%
		Gummy	(30)	<div></div>	100.0%	<div></div>	0.0%	<div></div>	
Pre Workout	Pre Workout	Powder	(867)	<div></div>	34.8%	<div></div>	13.6%	<div></div>	53.7%
		Capsule	(68)	<div></div>	17.6%	<div></div>	16.7%	<div></div>	100.0%
		Effervescent	(3)	<div></div>	66.7%	<div></div>	0.0%	<div></div>	
		Gel	(4)	<div></div>	25.0%	<div></div>	0.0%	<div></div>	
		RTD	(124)	<div></div>	3.2%	<div></div>	0.0%	<div></div>	
Protein RTM	Gainer	Powder	(420)	<div></div>	41.4%	<div></div>	14.4%	<div></div>	56.0%
		Post-Workout	(289)	<div></div>	24.6%	<div></div>	23.9%	<div></div>	82.4%
		Animal	(41)	<div></div>	12.2%	<div></div>	20.0%	<div></div>	100.0%
		Blend (non-plant)	(223)	<div></div>	5.8%	<div></div>	15.4%	<div></div>	100.0%
		Whey	(1,584)	<div></div>	4.0%	<div></div>	6.3%	<div></div>	75.0%
		Meal Replacement	(336)	<div></div>	1.8%	<div></div>	16.7%	<div></div>	100.0%
Electrolytes	Electrolytes	Powder	(218)	<div></div>	4.1%	<div></div>	11.1%	<div></div>	100.0%
Protein Bars	Protein Bars	RTE	(1,003)	<div></div>	5.4%	<div></div>	10.5%	<div></div>	100.0%

# Selling creatine as a standalone product needs to be done cognisant of where creatine is added to products.

# For consumers who are detailed about their approach to nutrition, they will be aware of the potential for stacking ingredients.

# Where next for creatine?

(1) Greater scope in performance



(2) Beyond sports performance – brain, weight



(3) Active nutrition and agelessness



# Proposition and population



Figure 11. Products that are offering a differentiated creatine proposition

# Creatine 'plus'



4G CREATINE

WARRIOR  
CREATINE  
+ ELECTROLYTES  
UNFLAVORED

175MG  
ELECTROLYTES  
BLEND

**Contains 175mg of Electrolytes  
as well as Creatine**

Hydration, endurance, balance, and performance in every scoop




WARRIOR

CREATINE  
+ COLLAGEN  
MIXED BERRY

**Contains 5g of Collagen  
Peptides as well as Creatine**

Collagen supports strength, joints, recovery, and performance.



WARRIOR

CREATINE  
+ EAA  
MIXED BERRY

**Contains 5g of Essential Amino  
Acids and 3g Creatine**

Muscle growth, recovery, strength, and performance.



4G CREATINE

WARRIOR  
CREATINE  
+ ENERGY  
UNFLAVORED

80MG  
CAFFEINE

**Contains Vitamin B3 16.5mg,  
B6 1.4mg & B12 1.5ug**

Energy, metabolism, and performance in every scoop.

# Next generation brain health



**Supplement Facts**  
Serving Size 1 Scoop (5g)  
Servings Per Container About 100

	Amount Per Serving	% Daily Value
Creatine Monohydrate	5g	**

\*\* Daily Value not established.

**CAUTION:** AS WITH ANY DIETARY SUPPLEMENT, PLEASE CONSULT YOUR HEALTHCARE PROVIDER BEFORE USE, ESPECIALLY IF YOU ARE PREGNANT, NURSING, HAVE A MEDICAL CONDITION, OR ARE TAKING MEDICATIONS INCLUDING OTHER SUPPLEMENTS.

KEEP OUT OF REACH OF CHILDREN. NOT INTENDED FOR USE BY PERSONS UNDER THE AGE OF 18.

†THESE STATEMENTS HAVE NOT BEEN EVALUATED BY THE FOOD AND DRUG ADMINISTRATION. THIS PRODUCT IS NOT INTENDED TO DIAGNOSE, TREAT, CURE, OR PREVENT ANY DISEASE.

Certified



# More recently, there has been a lot of interest in additional benefits related to the brain.



# Creatine as an everyday essential

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# The breadth of creatine applications continues to evolve, including trend mash ups

# GLP-1 companion products



Figure 15. YouTheory and their GLP-1 range of products



# Longevity and agelessness



# The Beckham Stack combines IM8 Daily Ultimate Essentials and Daily Ultimate Longevity for full-spectrum nutrition and healthy aging—for today and tomorrow.\*

- ✓ **Optimal Nutrition:** 100+ nutrient-rich ingredients for daily health
- ✓ **Energy, Gut, Brain:** All-day energy, balanced digestion, and focus
- ✓ **Healthy Aging:** Supports NAD levels and support cellular repair

# Flavour and format



Figure 17. Products that are offering a differentiated creatine proposition

# Product appeal

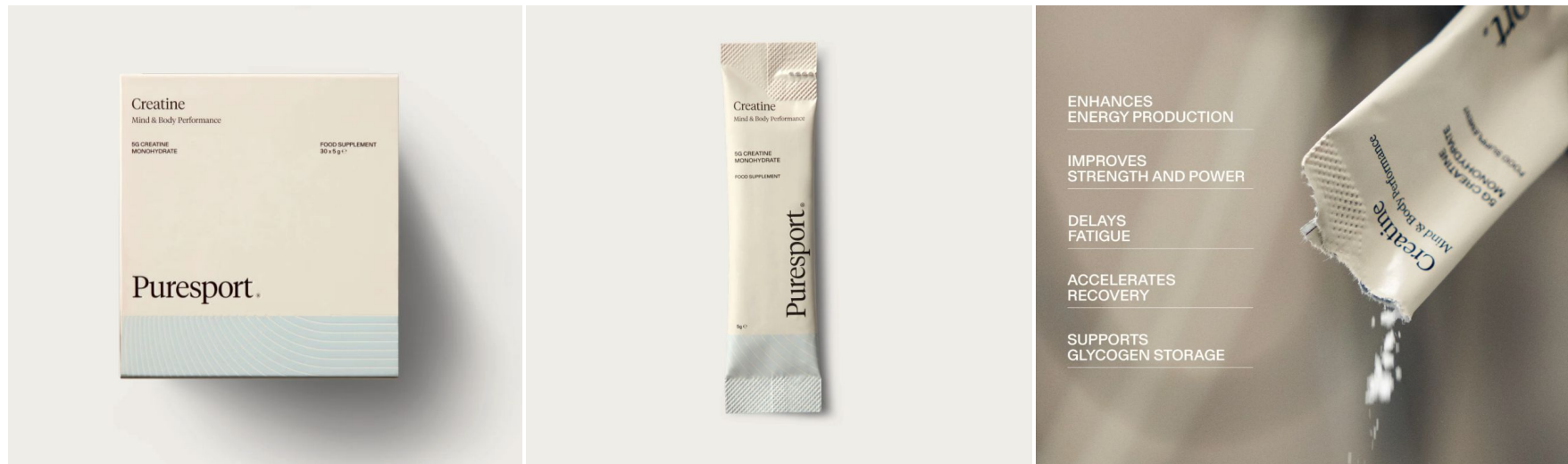
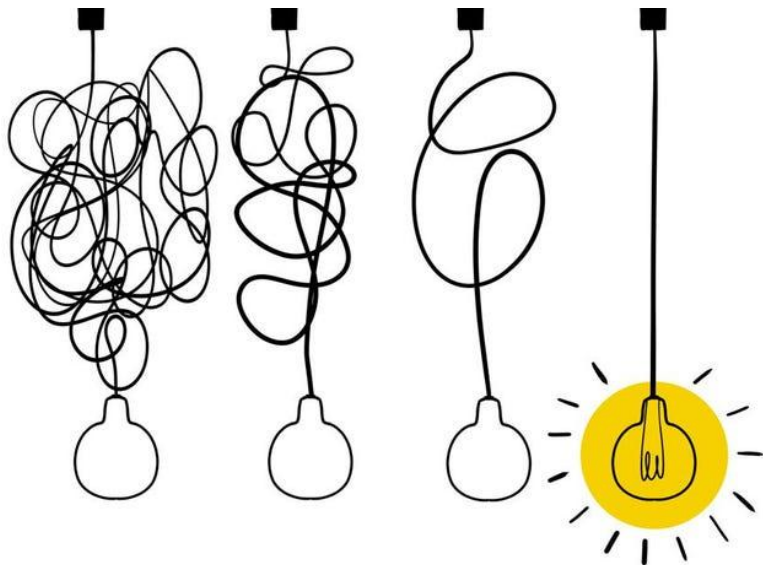


Figure 18. Creatine that looks more premium and exclusive

# Creatine reinvented

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# Creatine is well researched ingredient that has huge scope to broaden appeal in performance and beyond.

# The role of creatine for the brain, with women and to support consumers on a GLP-1 journey is emerging.

# Further, the paradigm shift of healthy aging to longevity and the pursuit of agelessness offers further opportunity.

# Product format, inclusive of product experience, will also continue to evolve as consumers demand more accessible products.

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