Heroine chic

They call them 'girls with guns' and through social media they're creating a new ideal of female beauty. How can grocery cash in?

Rob Brown

Fashion is cyclical. So are concepts of beauty. If one look can be said to have defined the 1990s, it is 'heroin chic' – see the pale skin, dark-ringed eyes and angular frames of Kate Moss, Jaime King, or Uma Therman as smack-snorting moll Mia Wallace in Pulp Fiction.

It's come full circle. Size zeros might still rule the catwalks but a new ideal is emerging in gyms and on social media: tanned skin, rippling abs and thighs that would make a racehorse jealous. It's now in fashion to be fit.

Superfit, that is. Bloggers such as Massy Arias and Anna Victoria have lured millions to their Instagram feeds with images to inspire (or guilt trip) followers into working out. Think swinging kettlebells, swaying punchbags and sweating torsos, yoga poses and fruit & veg smoothies.

This is heroine chic. So how is the male-dominated sports nutrition market, which has seen grocery sales surge 10.5% on volumes up 14.5% [Kantar Worldpanel 52 w/e 19 June 2016] adapting to cater for this new breed of aspiring superwomen? And what other factors are shaping the market?

SUPPLEMENTS BESTSELLERS

IRI : 52 w/e 9 July 2016

	VALUE		VOLUME	
	£m	y-o-y %	kg/l (m)	y-o-y %
Dunn's River	**16.4**	–3.6	**5.5**	–3.9
Sci-Mx	**10.7**	1.2	**0.9**	–0.9
Maxinutrition	**7.5**	48.6	**0.4**	85.7
Maximuscle	**7.2**	9.1	**0.3**	19.1
Complan	**7.0**	2.3	**0.6**	–0.9

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- Sports nutrition has seen strong growth in the past year, in line with the increasingly health-conscious focus of consumers and brands.
- Isotonic sports drinks have stripped out some of this performance, declining in value and volume. Growth in bars, flapjacks and RTD shakes and smoothies shows the growing prominence of these in consumers' purchasing repertoire.
- It's worth noting the growth of traditional powders – large volume tubs at the premium end of the market, accounting for 2.2% of packs sold but 16% of value. This is a return to growth following a strong decline last year, driven by NPD in convenient formats.
- Promotion levels (excluding sports drinks) has risen by 1ppt to 34.8% of all packs sold. Bars in particular have been promoted more heavily.
- Sci-Mx and Maxinutrition, traditionally focused on specialist supplements, have successfully extended their ranges to widen their appeal, particularly through convenient RTDs and bars.

Chris Newman
Kantar Worldpanel

TAKE-HOME SHARE

Kantar Worldpanel: 52 w/e 19 June 2016

	VALUE		VOLUME	
	£m	y-o-y %	packs (m)	y-o-y %
Isotonic sports drinks	**44.7**	−4.5	**35.3**	−3.4
Protein powders	**14.9**	44.5	**1.4**	26.7
RTD shakes & smoothies	**9.9**	57.5	**6.0**	43.2
Sports bars	**8.1**	12.3	**7.2**	91.5
Sports flapjacks	**5.5**	77.4	**5.9**	80.1
Tablets	**4.8**	22.3	**5.3**	15.3
Capsules	**2.0**	−53.8	**0.1**	−55.1
Gels	**1.3**	16.2	**0.9**	15.3
Other formats	**0.8**	371.0	**0.4**	414.3
TOTAL CATEGORY	**92.0**	10.5	**62.3**	14.5

BRANDED VS OWN LABEL

Kantar Worldpanel: 52 w/e 19 June 2016

	VALUE		VOLUME	
	£m	y-o-y %	packs (m)	y-o-y %
Branded	**84.2**	18.0	**53.6**	23.9
Own label	**7.8**	−34.4	**8.7**	−21.9

RETAIL SHARE

Kantar Worldpanel: 52 w/e 19 June 2016

			TRADING	VALUE
	grocery	category	index	y-o-y %
Bargain stores	2.1	5.4	**257.1**	8.5
Tesco	25.1	28.4	**113.1**	9.5
Independents & symbols	1.1	1.1	**100.0**	3.7
Asda	13.7	13.2	**96.4**	21.2
Sainsbury's	14.4	11.3	**78.5**	24.1
Morrisons	10.1	7	**69.3**	−24.1
The Co-op	5.2	3.3	**63.5**	49.9
Aldi	5	2.5	**50.0**	−18.1
Lidl	3.8	1.3	**34.2**	48.3
Waitrose	4.9	1.5	**30.6**	73.5
Marks & Spencer	3.4	0	**0.0**	26.7

The take-home snapshot is produced by Kantar Worldpanel. Kantar Worldpanel monitors the grocery retailer take-home purchasing habits of 30,000 demographically representative British households. Call 020 8967 0007 or visit www.kantarworldpanel.com for details

"The market a few years ago was 15% female – now it's 25 to 30%. We need a new approach"

One thing's for sure: sports nutrition is no longer just about muscularity: bodybuilders looking for more bulge to their biceps. "As a brand we know the market a few years ago was 15% female," says Chay Watkins, marketing director for Sci-Mx. "Now it's between 25 and 30%. We can't just shrink and pink our products to appeal to these consumers. We need a new approach."

Weapons or food?

It's a challenge because sports nutrition is still a decidedly butch category, dominated by names sounding more like lethal weapons than food (see Grenade, Shred-X, Dymatize). "Sports nutrition has now worked its way from the core bodybuilding and performance market, into mainstream consumers seeking out a healthier and more active lifestyle," says Paul Donegan, MD of Kinetica Sports. "The broadening of the sports nutrition consumer base over the past 12 months has created more demand for more accessible, convenient products from male and females – impacting on the ranges now available."

Sales are set to pass the £100m mark for the first time in the next year – though it's worth noting the true size of the market is much bigger, as these numbers do not include online specialists – driven by strong growth in protein powders and convenience-orientated products such as flapjacks and bars (see left).

"Essentially it's about having the right format for the right shopper in the right place," says Craig Percival, marketing director for nutrition at GSK, owner of Maxinutrition. "There are three pillars to this: the first is about unlocking convenience and impulse. We know 70% of recruitment into the wider category comes through RTDs and bars. Forty-one per cent of adults are looking for healthy alternatives. Second it's about demystifying the category because we know two of the key barriers are relevance and confusion. The third point is about having the right nutritionals with the right taste."

Maxinutrition has seen sales of its sports bars surge 43.3% to £5.9m, making it the sector's biggest brand. Volumes are up a much heftier 73.3% [IRI 52 w/e 9 July], as prices are lowered to drive impulse sales through listings at the front of store. Rival Sci-Mx has seen sales of its Pro2Go sports bars and cookies jump 8.7% to £4.2m while volumes are up 12.6%.

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The Innermost range

Launched: September 2016 **Manufacturer:** Innermost

You don't often see a pink protein blend pack in the butch world of sports nutrition. But the sector is no longer the sole preserve of bodybuilders looking for more bulge to their biceps, says Innermost founder Shivraj Bassi: "Innermost was founded to challenge the status quo and offer a real alternative to a large group of under-served consumers within the sector." The range comprises four products (rsp:£24/300g): Strong, for muscle gain; Fit, for energy; Health, for vitality; and Lean for weight loss.

Pro2Go Caramel Crisp

Launched: September 2016
Manufacturer: Sci-Mx

Sci-Mx has always been on the more butch side of the sector, calling on punters to 'shake it, smash it, boss it.' This chocolate-topped triple deck sandwich of caramel, nougat and soy crispies (rsp: £2.29) is a new departure. The machismo has been dialled back to broaden appeal, but the bar still packs a hefty 21g of protein.

BCAA Hydro Fuel

Launched: September 2016
Manufacturer: Kinetica Sports

The spiel for Kinetica's latest launch is heavy on the science. It's a supplement (rsp: £34.99/450g) designed to provide rapid muscle absorption of essential amino acids Leucine, Isoleucine and Valine during working out. Hydrolysed whey protein stimulates muscle protein synthesis while Citrulline Malate reduces muscle fatigue.

Pernaton Gel Forte

Launched: July 2016
Manufacturer: Pernaton

OK, you can't eat gel but this is still significant. With Brits getting active, some say muscle recovery products could be an opportunity. Gel Forte (rsp: £11.95/125ml) contains green lipped mussel extract – rich in omega-3 fatty acids and glycosaminoglycans – to ease aching muscles, and cayenne pepper to warm the skin and aid circulation.

"There's a huge job to be done on price point. Getting under the £2 price point is crucial"

Future growth will depend on brands broadening their appeal, says Watkins. "We are currently going through a rebrand," he says pointing to Sci-Mx's new Pro2Go Caramel Crisp (see left), which is the first NPD under the new livery. "There will be a massive push in impulse secondary sitings. The two key factors here are footfall and price point. There's a huge job to be done on price point. We know consumers are prepared to pay more for healthy snacks but getting under the £2 price point will be absolutely crucial."

A broader appeal

Proof of the importance of hitting lower price points and broadening appeal can be seen in the meteoric growth of Nakd, now widely sold at 75p. Bounce Energy Balls, up 52.8% on volumes up 63.6%, thanks in part to big distribution gains in retailers including WH Smith and Boots (the latter features the brand in its lunchtime meal deals)., is another case in point.

That Bounce doesn't even define itself as a sports nutrition product – rather a wholefood snack – is significant. A growing number of healthy, wholefood brands are muscling in on the sports market by appealing to consumers put off by the technical language used by sports nutrition brands or the high level of processing needed to make their products.

Nut butter is at the vanguard of this wholefood revolution. Brands are marketing themselves as athlete fuel thanks to nuts' naturally high protein and low sugar levels. Sun Pat recently sponsored running Twitter feed UKRunChat and Whole Earth sponsors the Man v Horse endurance race and has teamed up with Paralympic triathlete Faye McClelland.

"There's a growing interest in eating natural, 'clean' foods that are free from preservatives and additives," says Pippa Murray, founder of nut butter brand Pip & Nut, which has teamed up with brands including Nike, and Sweaty Betty to push its 30g squeeze packs (listed by Sainsbury's). "Foods with high (natural) fat and low carb content have also become increasingly popular, which has benefited products such as nut butters."

It's more than just nut butter. Plenish, for example, is a new cold-pressed juice and nut milk brand that's enlisted yoga instructor and blogger Jessica Skye to appeal to yogis. "Our ranges are designed by experts to

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proactively fuel your body and keep you top of your game," says founder Kara Rosen. "Our cold-pressed juices contain over half a kilo of organic produce in each bottle."

Price

There are two things to note here. First, the gender-neutral branding and targeting of active types are a clear departure from the butch approach of sports nutrition's big brands, likely to appeal more to women. Second, such products carry a healthy premium. Plenish's new Water+ range of probiotic drinks sells for £2.29 per 330ml. Its cold-pressed juices are £4.95 for 250ml.

It's not just products aimed at yummy mummies and yogis either. Punters will pay more for products with added health and fitness credentials, particularly when it comes to the addition of protein to existing recipes. For example, the Mars and Snickers Protein Bars launched in May carry an rsp of £2.19. Standard versions sell for as little as 40p each.

"Consumers are willing to pay a premium for products specifically designed to aid their sporting activity," says Nyree Chambers, head of marketing for Grace Foods UK, owner of the Nurishment Active RTD brand. "Consumers will also pay a premium for convenience. Ready to drink, high protein products are ideally placed to meet their demands."

The same can't be said for powders. Average price per kilo may be up 9.9% [Kantar], but this is chiefly down to the launch of smaller packs (500g versus the standard 900g or 1kg). The average price of Maxi, which has run four 50%-off deals since October, has fallen 15% [IRI], driving value growth of 48.6%. Sci-Mx, meanwhile has seen its powders inch up 1.2% on volumes down 0.9%. "We've consciously chosen not to do 50% off," says Watkins.

Sustainable growth in powders for grocers will not come from competing with Amazon on price, say experts. It depends on brands with a broader appeal. "Many existing companies want to appeal to a broader demographic, but their focus on innovation has led to increasingly large and confusing ranges," says Shivraj Bassi, founder of Innermost (see Innovations p48). "Innermost was founded to challenge the status quo and offer a real alternative to an increasingly large group who represent the next growth opportunity."

In other words, heroine chic could be about to go mainstream.

Hi-Oleic Peanut Butter

Launched: August 2016 **Manufacturer:** Whole Earth

You'll spot a theme in the following launches: a preponderance of nuts and oats, marketed on their nutritional benefits for sports nuts. Take this latest launch (rsp: £2.68/340g) from Whole Earth, sponsor of the Man vs Horse endurance race. By using only hi-oleic peanuts, which contain about 30% more monounsaturated fat than normal peanuts, Whole Earth is looking to attract consumers who want a natural protein hit but want to keep on top of their cholesterol levels. Heart UK approved.

Paleo Granola

Launched: July 2016
Manufacturer: Rollagranola

The paleo movement, founded in the Crossfit gyms of the US, is now in full swing this side of the pond. Rollagranola claims its three-strong range (rsp: £5.80) – mixes of nuts, seeds, fruit and spices with no cereal, gluten or refined sugar – provides the modern caveman or woman with a perfect, protein-packed pre-workout start to the day.

Brazil Nut Butter

Launched: May 2016
Manufacturer: Meridian

Launched with Macadamia and Pecan Butters to cash in on the build-up to Rio 2016, Meridian says its Brazil Nut Butter (rsp: 6.99/170g) has had a hot summer thanks to its high protein content (14.6g per 100g) and the growing use of nut butters among active types. It says sales of its kilo packs of peanut butter are booming through Virgin Gyms.

Mornflake Go!

Launched: March 2016
Manufacturer: Meridian

Mornflake is going for gym bunnies with its latest launch Go! (rsp: £1.39/70g pot or £2.29/eight sachets). "The protein market is set to reach £8bn by 2017," says marketing manager Richard Jones. "Health is a key driver." Go! comes in no-added-sugar and chocolate variants and contains up to 22% protein.