

Market trends and growth drivers



GLANBIA'S MARKET POSITION

Optimum Nutrition

#1

sports nutrition brand in the world.

GNS

#1

supplier of whey protein isolate.

Maximise athletic performance

Performance nutrition

The importance of nutrition in sports and fitness cannot be overstated. It plays an essential role in optimising training outcomes, hastening recovery periods, maintaining optimal body weight, minimising the risk of injuries and ensuring performance consistency.

How we're meeting this market need

World-leading brands and ingredients

Our portfolio of brands and ingredients hold significant leadership positions in the performance nutrition category. Most notably, Optimum Nutrition ("ON") is the world's #1 sports nutrition brand and has been a pioneer of performance nutrition for over 35 years. Available in over 90 countries, ON holds leading positions in protein powder with its Gold Standard Whey and Serious Mass products.

GPN's brand portfolio also includes Isopure which provides low and zero carb protein powders and drinks to premium consumers looking to support their active lifestyles, while BSN is targeted at consumers looking to build muscle mass with a range of protein and energy-based products.

In our Nutritional Solutions ("NS") ingredients business we build our business around healthy categories. We are the #1 global supplier of whey protein isolate supplying key market segments including performance nutrition. Our functional and nutritional ingredients appeal to the heightened desire of our customers for tailor-made ingredient solutions to enrich their food and beverage products.

\$25bn

The size of the global sports nutrition market

[+](#) Discover more on pages 32-39.

Source: Euromonitor. Glanbia team analysis.

Market trends and growth drivers continued



GLANBIA'S MARKET POSITION

GPN is the world's

#1

sports nutrition
company.

GN NS the world's

#2

global supplier of
micronutrient premixes.

A desire for healthy, active lifestyles

Improve physical and cognitive health
More and more people are focused on nutrition that supports a healthy and active lifestyle as well as boosting their mental health. Consumer interest in fortified foods and beverages with functional claims continues to increase, as people seek to supplement their diets with immune boosting nutrients to improve their energy levels and health.

How we're meeting this market need

Delivering trusted healthy lifestyle brands and ingredients

GPN offers a range of healthy lifestyle nutrition brands. think! offers high protein low sugar bars for consumers looking for healthy on-the-go snacking options. Isopure provides everyday nutrition with a commitment to purity, simplicity, and quality through products made with minimal ingredients, and only those you trust. Amazing Grass is a leader in the Greens segment with a range of Greens Superfood powders for consumers looking to supplement their intake of vegetables. This brand appeals to the growing consumer groups of flexitarians, vegetarians and vegans.

In our GN NS business, we offer tailor-made and sustainable nutritional ingredients and supplements that provide energy without compromising quality. Our ingredients are used in the bakery, beverage, snack bar, dairy and foodservice markets. Our capabilities range from producing 'straight' ingredients to bespoke premix blends. Historically anchored in dairy proteins, our capabilities now extend from marketing 'straight' ingredients to developing bespoke nutritional solutions using a wide range of ingredients, providing greater market reach and broader customer relevance.

\$160bn

The fitness sector is worth \$160bn and will increase by 172% to \$435bn by 2028.



Discover more on pages 32-39.

Source: Fitness Industry Trends & Statistics 2021 (strategicmarketresearch.com)