

# ATTITUDES TOWARDS SUGARS AND SWEETENERS – GERMANY – 2020

COVID-19 saw consumers turn to comfort foods while also prioritising healthy eating, providing opportunities for sugary treats as well as low-sugar products.



Heidi Lanschützer, Deputy  
Research Director,  
Germany



# Report Content

## EXECUTIVE SUMMARY

- Mintel's perspective

### Market context

- The impact of COVID-19 on attitudes towards sugar and sweeteners in food and drink
- Healthy eating is high on consumer and government agendas
- Naturalness is key for Germans

### Mintel predicts

- Overweight and obesity remain a pressing concern
- Ageing population increases opportunities for less-sweet food
  - Graph 1: population by age group, 2014-24

### What consumers want and why

- Consumers want low sugar content
- Consumers want neither refined white sugar nor artificial sweeteners
- Consumers want transparency in how sugar reduction is achieved

### Opportunities

- Add a savoury twist to sweet products for a less-sweet flavour profile
- Call out sweeteners' added-value attributes
- Explore sustainability benefits of local sugar beet
- Look to food waste as a source of sustainable sweeteners
- Quick download resources

## THE IMPACT OF COVID-19

- COVID-19's impact on the broader category
- Key shifts in consumer behaviours
  - Graph 2: concern about the risk of being exposed to COVID-19, 3 March-5 August 2020
- How COVID-19 is impacting key consumer segments
- Acknowledging threats...
- ...and focusing on opportunities
- How a COVID-19 recession will reshape the industry

## MARKET DRIVERS

### Health concerns around food and drink

- Sugars and artificial sweeteners are a leading concern
  - Graph 3: concerns around the amount of the following found in food and non-alcoholic drinks, June 2020
- The spotlight is firmly on sugar content
- Public spotlight is firmly on sugar content
- Naturalness is the nation's number one priority
- Use new ways to denote 'natural'

### Overweight and obesity in Germany

- Overweight and obesity levels remain high in Germany
- Over half of German adults are overweight or obese, and rates continue to grow
  - Graph 4: trends in body mass index (BMI), 1999-2017

### Legal and political measures towards sugar reduction

- Salt, fat and sugar reduction targets set for processed food for 2025
- Nutri-Score can help consumers to choose healthy diets
  - Graph 5: types of information that would help consumers understand the sugar content of food and drink, June 2020
- Government distances itself from a sugar tax

### Age-related perceptions of sweetness

- Shifting age structure presents challenges and opportunities
  - Graph 6: population by age group, 2014-24

### Usage of sugars and sweeteners at home

- Consumers use a range of alternative sweeteners at home

## WHAT CONSUMERS WANT AND WHY

### Sugar consumption and efforts to reduce it

- Over-55s are the most sugar aware
  - Graph 7: opinion about the amount of sugar consumed from all food and drink, by age group, June 2020
- Perceptions of sugar intake diverge from official data
- Older men take less interest in reducing sugar consumption
  - Graph 8: consumers who are actively taking steps to limit or reduce the amount of sugar in the diet, by gender, June 2020
- Healthy eating is high on Germans' agendas, but there's lots of room for treats too
  - Graph 9: where consumers sit on the healthy diet spectrum, July 2019

# Attitudes towards Sugars and Sweeteners – Germany – 2020

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- Choosing low/no/reduced products is the preferred way to limit or reduce sugar intake
  - Graph 10: actions taken to limit/reduce sugar intake, June 2020
- Plant-based sweeteners will strike a chord
- Savoury flavours can appeal to sugar-concerned consumers
- Promote healthier shortcuts to aid cooking from scratch
  - Graph 11: consumers who cook from scratch to limit/reduce sugar intake, by gender and age, June 2020

## Perception of sugars and sweeteners

- Refined sugar and artificial sweeteners are viewed most negatively
  - Graph 12: perceptions of sugars and sweeteners, June 2020
- White sugar considered most highly processed
  - Graph 13: perception of sugars and sweeteners as 'processed', June 2020
- Raw cane/beet and brown sugar viewed as less processed
  - Graph 14: perceptions of cane and beet sugar types, June 2020
- Honey stands out for its natural and appealing quality
  - Graph 15: perception of sugars and sweeteners as 'natural', June 2020
- Kolibri combines naturalness and customisation with agave syrup
- Plant-based sweeteners enjoy positive image compared to artificial ones
  - Graph 16: perceptions of sweeteners, June 2020
- Education around plant-based sweeteners is important

## Behaviours towards sugar and sweeteners in food and drinks

- Provide information on how sugar reduction is achieved
  - Graph 17: behaviours towards sugar and sweeteners in food and drink, June 2020
- Transparency will win consumers' trust
- Communicate additional benefits of sweeteners
- Innovators explore fibres to reduce sugar content

## Attitudes towards sugar and sweeteners in food and drinks

- Even sweet food categories can reduce sugar
  - Graph 18: attitudes towards sugar and sweeteners in food and drink, June 2020
- Consumers are happy with a less-sweet taste
- Creatively introduce sceptical consumers to sugar reduction
- REWE collaborates with consumers in developing reduced-sugar products
- Expand the portfolio of products with stevia
- Consumers look for sustainability initiatives
  - Graph 19: agreement that beet sugar is more sustainable than cane sugar, by age groups, June 2020



## LAUNCH ACTIVITY AND INNOVATION

### Usage of sugar and sweeteners in NPD

- Usage of white sugar decreases in favour of non-nutritive sweeteners
  - Graph 20: new food and drink launches, by use of sugars and sweeteners, Jan 2016-Aug 2020
- Some companies highlight their use of sugar alternatives on front of pack
- Usage of sugars and sweeteners in drink launches
  - Graph 21: drink launches by use of sugars and sweeteners, Jan 2016-Aug 2020
- Usage of sugars and sweeteners in food launches
  - Graph 22: food launches in selected categories, by use of sugars and sweeteners, Jan 2016-Aug 2020
- Sugar content of products with added sugar is shifting

### Use of low/no/reduced sugar claims in NPD

- Sugar-related claims see consistent growth
  - Graph 23: food and drink launches with sugar-related claims, Jan 2016-Aug 2020
- Snack bars address consumers' sugar concerns
- Yogurt with no sugar or sweetened with sugar alternatives win favour
- Chocolate manufacturer gives consumers a choice
- Low-sugar credentials are used to make BFY chocolate
- Tea aisle responds to sugar concerns
- Milk and plant-based drinks abandon added sugar
- Low/no/reduced sugar biscuits appeal to the health-conscious consumer
- No added sugar claims increase the appeal of savoury products
- 'Healthier' table sauces have less sugar

## APPENDIX

### A note on COVID-19

- COVID-19's impact on sugars and sweeteners in food and drink and German consumer behaviour

### Appendix – products covered, abbreviations and consumer research methodology

- Abbreviations
- Consumer research methodology

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