

# BEER – GERMANY – 2021

The COVID-19 lockdowns have boosted retail sales of beer. Further innovation in low-/non-alcoholic options is needed to address general alcohol moderation.



Heidi Lanschützer, Deputy  
Research Director,  
Germany



# Report Content

## EXECUTIVE SUMMARY

### Key issues covered in this Report

- Mintel's perspective

### Impact of COVID-19 on beer

- The impact of COVID-19 on the category
- COVID-19's impact on beer and German consumer behaviour

### Market context

- Pandemic outbreak challenges the entire beer industry
  - Graph 1: turnover of food and beverage service activities at constant prices (in real terms), March 2020–January 2021
- Health and financial concerns lead to further alcohol moderation
  - Graph 2: consumers who drink less alcohol because of health or financial reasons, by age groups, October 2020

### Mintel predicts

- "Getting back to normal" will prompt modest fall in beer volume sales
- Market size & forecast following COVID-19 outbreak
- Retail volume growth is predicted to decrease once life gets back to normal
- Premiumisation will drive value growth by 2025

### What consumers want, and why

- Consumers want: more low-/non-alcoholic beer
- Consumers want: locally produced beer
- Consumers want: further innovation in the beer segment

### Opportunities

- Elevate drinking occasions at home
- Position premium beers as affordable luxuries
- Use the power of Instagrammable packaging to attract younger beer users

### The competitive landscape

- Radeberger Gruppe KG remains the market leader...
  - Graph 3: retail market shares of beer, by value and volume, 2020
- Quick download resources

## MARKET DRIVERS

- Ongoing lockdown
- The impact of COVID-19 on the German economy
  - Graph 4: key economic data, in real terms, 2019-22
- Brexit: some disruption for German trade will be inevitable
- Beer industry hit hard by on-premise losses...
  - Graph 5: turnover of food and beverage service activities at constant prices (in real terms), March 2020–January 2021
- ...making the at-home occasion for drinking beer even more important
  - Graph 6: consumption of alcoholic drinks in public venues, by age groups, October 2020
- A structural shift of the beer industry is looming
- General alcohol moderation is health and finance driven
  - Graph 7: consumers who drink less alcohol because of health or financial reasons, by age groups, October 2020
- New level of hyper-nesting offers trade-up opportunities
  - Graph 8: consumers who are actively seeking ways to reduce stress, July 2019 vs July 2020\*

## WHAT CONSUMERS WANT, AND WHY

### Impact of COVID-19 on consumer behaviour

- One third of Germans have made changes to the amount of beer they drink since COVID-19
  - Graph 9: current beer consumption compared to before the COVID-19 outbreak, December 2020
- Fewer social events make focusing on in-home drinking more important
  - Graph 10: reasons for currently drinking less beer compared to before the COVID-19 outbreak, December 2020
- Virtual socialising can create new drinking occasions
- COVID-19 outbreak boost usage of low-/non-alcoholic beer
  - Graph 11: users of low-/non-alcoholic beer who currently drink more of it than they did before the COVID-19 outbreak, by age groups, December 2020

### Usage & purchase of beer

- Germany remains a beer nation, with three in four adults drinking it
  - Graph 12: frequency of drinking beer, both in and out of home, in the last three months, December 2019 and December 2020
- Men are the beer market's core audience
  - Graph 13: drinking beer at least once a week, by gender and age groups, December 2020
- Beer consumption differs with financial situation
  - Graph 14: beer consumption in the last three months, by financial situation, December 2020
- Pilsener is the most popular beer type
- Beer mixes' usage significantly drops with age

## Beer – Germany – 2021

---

- Graph 15: consumption of beer-based mixed drinks in the last three months, by age groups and gender, December 2020
- One in three German beer drinkers reach for non-alcoholic options
  - Graph 16: low-/non-alcoholic beer drunk in the last three months, by age groups, December 2020
- Supermarkets are the top purchase channel for beer in Germany
  - Graph 17: places where beer was bought in the last three months, 2019 vs 2020
- Online grocery shopping is gaining ground

### Factors that encourage consumers to try new beers

- Local production encourages new beer trial as much as special offers/promotions
  - Graph 18: factors that would encourage the trial of new beers, December 2020
- Local production particularly appeals to older beer drinkers
- Importance of localism boosted by COVID-19...
- Go beyond "made in Germany" claims
- Explore more ways to attract ethically...
- ...and environmentally conscious shoppers
- Using and generating renewable energy can strike a chord
- International inspiration: brands set new standards in the sustainability space
- Visually appealing packaging particularly intrigues younger beer users
  - Graph 19: beer drinkers who choose 'visually appealing packaging' as one of the most encouraging factors for trying a new beer, by age groups, December 2020
- Flavour innovation should chime with younger beer drinkers
- International inspiration: botanical flavours in beer
- Low-alcohol formulations should help attract more women and over-55s

### Behaviours around beer

- Beer brands should actively tap into great popularity of beer for evenings-in
  - Graph 20: behaviours around beer, December 2020
- Position beer more actively for evening in occasion
- Bring the on-tap experience into the home
  - Graph 21: beer users saying a wider selection of draft beer would make them choose one pub/bar over another, by age groups, December 2020
- The home is where consumers will seek to trade up
  - Graph 22: beer users who would rather drink small amounts of premium beer than a larger amount of standard beer, by financial situation, December 2020
- Continue highlighting and proving quality aspects
- Capitalise on beer drinker's willingness to pay a premium for craft beer
- The time is right for private label craft beer
- Consumers are looking for new beer experiences
  - Graph 23: amount of beer types drunk, by age group, December 2020

## Beer – Germany – 2021

---

- Make it easier for consumers to try new products at home
- Ageing population increases demand for less-sweet beer mixes
  - Graph 24: agreement with "I think most beer-based mixed drinks are too sweet", by age groups, December 2020
- Beer mixes can up their health image by using fruit juice
  - Graph 25: interest in trying beer mixed with fruit juice, by age groups, December 2020

### LAUNCH ACTIVITY AND INNOVATION

- Private label gains more importance in terms of launches
- Lidl and Aldi were leading in terms of launches in 2020
  - Graph 26: beer launches by top companies, 2020
- Explore various ways to attract ethically conscious shoppers
  - Graph 27: beer launches, by selected ethical and environmental claims, 2019 vs 2020
- Tapping into the sustainability halo of Fridays for Future
- Beer brands trade on local provenance in different ways
- Natural is one of the most important claim categories which tends to grow
  - Graph 28: top five natural claims in beer launches, 2016 vs 2020
- Unfiltered beer can foster natural associations
- Low- and no-alcohol beer launches continue to gain share
  - Graph 29: beer launches, by alcohol content and by year, 2019 vs 2020
- Breweries acknowledge thirst for no-alcohol options
- Beer mixes explore opposite ends of alcohol content
- Going beyond alcohol reduction for a "healthier" image
- Brands look to botanicals and herbal ingredients to convey relaxing image

### MARKET SHARE

- Private label retains top position in beer volume sales

#### Germany: retail market share of beer, by volume, 2019-20

- Private label leads volume sales in the beer market

#### Germany: retail market share of beer, by value, 2019-20

- Radeberger Gruppe enjoys market leadership

### MARKET SEGMENTATION, SIZE AND FORECAST

#### Forecasting during the COVID-19 pandemic

- Note on forecast in response to COVID-19
- Retail sales of beer will benefit until life returns to normality

## Beer – Germany – 2021

---

- Retail volume growth is predicted to decrease when life gets back to normal
- Premiumisation is expected to drive value growth by 2025

### **Germany: retail volume sales of beer, by type, 2019-20**

- Craft beer and export seem to struggle the most due to the COVID-19 impact

### **Germany: retail value sales of beer, by type, 2019-20**

- White beer and lager enjoy huge growth in value sales

### **Germany: retail volume sales of beer excluding beer mixes, by alcohol content, 2019-20**

- Sales of non-/low-alcoholic beers continue to rise in both volume...

### **Germany: retail volume sales of beer excluding beer mixes, by alcohol content, 2019-20**

- ...and value terms

## APPENDIX

### **Appendix – products covered, abbreviations, consumer research methodology and language usage**

- Products covered in this Report
- Abbreviations
- Consumer research methodology
- A note on language

### **Appendix – market size and forecast**

- Forecast methodology
- Forecast methodology – fan chart
- Market size and forecast – value
- Market size and forecast – volume
- Market size and forecast – value – best- and worst-case
- Market size and forecast – volume – best- and worst-case

# About Mintel Reports: Germany

Access our reports now and get the most accurate, credible and powerful data, insights and analysis. Mintel Reports Germany gives you everything you need to know about what German consumers want and why.

In each report, we're analysing the market, new product innovations and the competitive landscape, as well as consumer behaviours across Germany. Our local analysts, supported by our team of global experts then translate it into what it means for you.

## What makes us unique?

- ✔ A 360-degree view of German markets
- ✔ Experienced analysts based in Germany
- ✔ Expert-led support from global category experts

## How Mintel Reports Germany will help your business grow:

01

Identify future opportunities by understanding what German consumers want and why

02

Make better decisions faster by keeping informed on what's happening across your market

03

See the trends and innovations impacting Germany both on a local and global level

**BUY THIS REPORT NOW**

**€2600.00 | £2195.00 | \$2995.00\***

[store.mintel.com](https://store.mintel.com)

Americas: +1 (312) 932 0400  
China: +86 (21) 6032 7300  
Germany: +49 (0) 211 3399 7411  
India: +91 22 4445 1045  
Singapore: +65 6653 3600  
Thailand: +66 2 821 5122  
UK: +44 (0) 20 7606 4533

\*These prices are correct at time of publication, but are subject to change due to currency fluctuations.

**MINTEL**

### Disclaimer

This is marketing intelligence published by Mintel. The consumer research exclusively commissioned by Mintel was conducted by a German licensed market survey agent ([See Research Methodology for more information](#)).

### Terms and Conditions of use

Any use and/or copying of this document is subject to Mintel's standard terms and conditions, which are available at <http://www.mintel.com/terms>

If you have any questions regarding usage of this document please contact your account manager or call your local helpdesk.

### Published by Mintel Group Ltd

[www.mintel.com](http://www.mintel.com)

### Help desk

UK	+44 (0)20 7778 7155
US	+1 (312) 932 0600
Australia	+61 (0)2 8284 8100
China	+86 (21) 6386 6609
Germany	+49 211 2409023
India	+91 22 4090 7217
Japan	+81 (3) 6228 6595
Singapore	+65 (0)6 818 9850