

BOTTLED WATER – GERMANY – 2022

Despite the cost of living crisis, new bottled water concepts like low carbonation or added electrolytes offer growth opportunities for brands.



A Mintel Analyst, Global Analyst



Bottled Water – Germany – 2022

This report looks at the following areas:

- The impact of the current economic situation on bottled water sales.
- Consumption of bottled water, including changes to consumption in the last three years, which types of bottled water are most widely consumed and which types are seeing the most growth.
- Attitudes towards bottled water, reasons for choosing bottled water and interest in new bottled water concepts such as low carbonation or added electrolytes.
- Reasons for drinking bottled water, including for energy or mental focus.
- How bottled water brands are innovating and bringing new concepts to the market.



Despite the cost of living crisis, new bottled water concepts like low carbonation or added electrolytes offer growth opportunities for brands.

Overview

41% of German bottled water drinkers – rising to 53% of 16-34s – are interested in flavour concentrates from bottled water brands that allow them to make flavoured waters at home. Furthermore, 34% of Germans use a sparkling water maker at home. This gives brands an opportunity to develop flavour concentrates to add excitement to both bottled water and homemade sparkling water.

Inflation is currently high, with experts predicting a further increase over the coming months and consumers' incomes being squeezed. **Rising food costs could mean tap water is drunk** as a cheaper alternative; 17% of Germans* currently drink bottled water, but have cut back.

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The **accelerated sustainability movement in the category will ingrain the use of refillable bottles and sparkling water makers** at home with **34% of Germans** agreeing that bottled water in bottles made of 100% recycled plastic is still bad for the environment. Brands need to look to more sustainable packaging materials as they strive to improve their eco credentials.

42% of German bottled water drinkers/buyers agree that drinking fortified water is a good way to boost vitamin/mineral intake, with notably higher agreement among 16-24s (**58%**). Electrolyte waters have huge potential, with **46% of flavoured still water drinkers agreeing that electrolyte-enriched water is worth paying more for.**

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Report Content

EXECUTIVE SUMMARY

Key issues covered in this Report

- Overview
- The five year outlook for bottled water

Market context

- Nine in 10 Germans drink bottled water
 - Graph 1: consumption of bottled water in the last three months, 2019 and 2022
- Stress the superior quality of bottled water over tap
- Ongoing health trend is a key strength of bottled water

Mintel predicts

- Market size and forecast
- Growing need to prove the worth of bottled water over sparkling water makers and tap water
- Market value forecast to increase by 19% up to 2027...
- ...whereas market volume is on a slowly declining path from 2022

Opportunities

- Explore different levels of carbonation
- Use electrolytes to create 'sports waters'
- Widen seasonal flavours from tea and infusions
- Go beyond fortified vitamins/minerals and add botanical ingredients

The competitive landscape

- Private labels take an important share of volume sales in a highly fragmented bottled water market
 - Graph 2: company retail value and volume market shares of bottled water, 2021
- Quick download resources

MARKET DRIVERS

- Strong post-COVID-19 bounceback followed by a period of slower growth
 - Graph 3: key economic data, in real terms, 2019-23
- Inflation is the key concern in 2022 for consumers, brands and the economy...
- ...impacting financial wellbeing and consumer expenditure
- Hot summers drive sales of bottled water
 - Graph 4: average summer temperature, 2016-21

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- Germans love bottled water but have worries and concerns about the environmental impact
- Tap water offers a cost benefit over bottled water; however, contamination concerns are high
- Packaging gets an overhaul
 - Graph 5: who consumers hold most responsible for increasing the amount of packaging that is recycled, 2022
- Consumers will return to refillable water bottles
- Nutri-Score reinforces water as the healthy option
- Boosting immunity fits with bottled water's healthy image
- Cold brew tea brands ramp up the competition with bottled water

WHAT CONSUMERS WANT AND WHY

Consumption of bottled water

- Nine in 10 Germans drink any bottled water
 - Graph 6: consumption of bottled water in the last three months, 2019 and 2022
 - Graph 7: types of bottled water drunk in the last three months, 2019 and 2022
- Unflavoured sparkling water has the highest volume consumption
 - Graph 8: consumption of bottled water once a day or more, 2019 and 2022
- Biggest rise seen in consumer base for flavoured sparkling water
- Bottled water drinkers drink most types
 - Graph 9: other types of bottled water drunk, by type drunk, 2022

Use of refillable bottles, in-home water filters and sparkling water makers

- Scope for more refillable bottles and higher public water refill point usage
 - Graph 10: use of refillable water bottles when out of home, 2019 and 2022
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 - Graph 11: use of a sparkling water maker at home, by age, 2022
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- Majority of Germans agree they should drink more water
 - Graph 13: attitudes towards water and bottled water, 2022
- Stress the superiority of bottled water over tap water
- Brands can support consumers with reminders to drink more water
- Low carbonation wanted for sparkling water drinkers
 - Graph 14: interest in select bottled water concepts, 2022
- Different levels of carbonation can support different usage occasions
- Describe the sensation of carbonation
- High interest in flavoured water concentrates

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- Graph 15: interest in flavour concentrates from bottled water brands, by type of water drunk in the last three months, 2022

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- SodaStream launches organic syrup range with less sugar

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- Taste, health and hydration are primary usage drivers
 - Graph 16: reasons for drinking bottled water, 2022
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- US inspiration: bottled water serves as an alternative to alcoholic drinks
- Tap into social media for NPD inspiration
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- Energy and sports waters offer potential
 - Graph 19: agreement that bottled water with energy-boosting ingredients is more appealing than energy drinks, by select reasons to drink bottled water, 2022
- Tap into co-branding opportunities for syrup and concentrate
- Mood-boosting water can add extra value
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- International inspiration: tap into botanicals and herbs
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- US inspiration: Glacéau offers electrolytes, key vitamins and minerals
- Thalheim's medicinal water reminds consumers that minerals are the original electrolytes
- Target young males with electrolyte waters
- Focus on more sustainable bottles and go the extra mile...
- ...because recycled plastic is still bad for the environment

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- Take time (and space) to explain more on-pack
- Going the extra mile: ClimAid bottled water is regional and climate-neutral
- Instill trust by addressing concerns about microplastic
- Paperboard packaging is set for further take-up in the drinks markets

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- Take flavour inspiration from tea and infusions...
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- Water brands focus on minus claims
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 - Graph 27: top five motivations for using functional/fortified food and drink, 2020
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- Hohes C delves into functional waters
- B'More offers waters for improved quality of life
- Scope for beauty waters to expand

Advertising and marketing activity

- Drink more water with waterdrop
- Volvic asks "Are you thirsty for action?"

MARKET SHARE

Retail market share of bottled water, by value and volume, 2020-21

- The German bottled water market is very fragmented
- Gerolsteiner Brunnen has company market leadership of bottled water...

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- ...but private labels are dominant overall

Company retail value and volume shares of flavoured bottled water, 2020-21

- Danone is the market leader for flavoured bottled water; private label declines in both value and volume

Company retail value and volume shares of unflavoured bottled water, 2020-21

- Gerolsteiner Brunnen leads; private label accounts for half of volume sales of unflavoured bottled water

MARKET SIZE, SEGMENTATION AND FORECAST

- Bottled water volume sales expected to decline further
- Value sales of bottled water forecast to rise by 19% up to 2027
- Market volume on a steadily declining path
- Unflavoured and sparkling water lose value sales in 2021
- Volume sales fell in all categories in 2021

APPENDIX

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

- Products covered in this Report
- Abbreviations
- Consumer research methodology
- CHAID Analysis
- Target young males with electrolyte waters
- A note on language

Appendix – market size and central forecast methodology

- Forecast methodology
- Forecast methodology – fan chart
- Market size and forecast – value
- Market size and forecast – volume
- Market forecast and prediction intervals – value
- Market forecast and prediction intervals – volume

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