

# CARBONATED SOFT DRINKS – GERMANY – 2024

Target women and over-45s with functional CSDs. Less sweet is an opportunity to gain health-conscious Germans, whilst CSDs can gain from alcohol moderation.



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# Carbonated Soft Drinks - Germany - 2024

## This report looks at the following areas:

- Market drivers for carbonated soft drinks (CSDs), including the impact of inflation, scrutiny of unhealthy food/drink aimed at children and climate change driving the desire for thirst quenchers
- Usage of CSDs, including how to appeal to women who drink fewer CSDs (both diet and regular) than men
- Behaviours related to CSDs, including how own labels can experiment with new flavour combinations to entice younger Germans, while brands can emphasise their original taste
- Attitudes towards CSDs, with demand for less plastic waste creating opportunities for brands to communicate their sustainability efforts
- Interest in trying CSDs, with the alcohol moderation trend providing an opportunity for CSDs to position themselves as a viable adult drink alternative
- Recent product launch activity, innovations, market share, size and forecast



Target women and over-45s with functional CSDs. Less sweet is an opportunity to gain health-conscious Germans, whilst CSDs can gain from alcohol moderation.

## Overview

82% of Germans drank carbonated soft drinks in the three months leading to January 2024. They are **more popular among German men** with 87% having drunk CSDs and only 78% of women doing so. The **negative health perception of CSDs** deters women, with 73% of female consumers saying they eat/drink healthily all or most of the time versus 58% of men.

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Adding functional benefits to CSDs such as supporting gut health (eg probiotics) will **boost the health image of CSDs** and attract female consumers and those who want better-for-you options.

The alcohol moderation trend is an opportunity for CSDs to target Germans looking for viable alternatives **that do not look dissimilar to the alcoholic beverages** they are replacing.

Furthermore, **55% of Germans** aged 16-34 are most inclined to believe the use of **natural ingredients in a CSD makes it feel premium**. This provides an opportunity to use plant-based ingredients (eg **yerba-mate** for energy) to further enhance the appeal of CSDs by imbuing a healthier image rather than an ultra processed one.

**Taste and price are key** for both own labels and branded CSDs to retain and win German CSD drinkers. Brands can continue to **emphasise the original taste** to retain loyal fans while own labels can compete with brands by trying out **exciting flavour** combinations such as **pineapple-dragonfruit**.

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# Report Content



## EXECUTIVE SUMMARY

### Key issues covered in this Report

- Overview
- The five year outlook for carbonated soft drinks

### Market context

- Focus on sugar reduction sees German consumers looking for BFY options
- Sporting events and climate change offer a boost to CSDs in 2024
- Alcohol moderation trend provides opportunity for CSDs to position themselves as viable substitutes
  - Graph 1: consumers who have limited alcohol consumption in the last 12 months or don't drink alcohol, % of respondents, by age, 2023

### Mintel predicts

- CSDs volume sales will stagnate while value sales will grow
- Value to increase as cost of ingredients likely to rise long-term
- Volume will stagnate as Germans look to healthier alternatives
- Market size and forecast

### Opportunities

- Target female Germans with CSDs with gut health benefits
- Premiumise CSDs through the use of natural ingredients
- Use novel flavours to win over Germans aged 16-34
- Appeal to Germans in all age groups with less sweet CSD flavours
- Capitalise on alcohol moderation by mimicking the taste of popular cocktails

### The competitive landscape

- Own label CSDs benefit from Germans trading down
  - Graph 2: company retail value and volume shares of CSDs\*, 2023

## MARKET DRIVERS

### The German economy

- 2024 is expected to be more challenging than initially predicted
  - Graph 3: key economic data, in real terms, 2019-25
- The inflation rate is slowly bouncing back to more conventional levels
- Inflation is still the key factor affecting consumers' finances...

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- ...confidence and expenditure
  - Graph 4: financial confidence index, 2022-24
- CSD brands will emphasise their superior taste to prevent consumers trading down to own labels
- BMEL's voluntary sugar reduction strategy challenges CSDs to curb sugar content by 15%
- Proposed ban on advertising unhealthy food and drink to children likely to drive down sales of CSDs
- An increase in BMIs in Germany...
- ...drives the need for better-for-you (BFY) CSDs...
- ...but scrutiny of NSS casts doubt on sugar substitutes to aid weight loss
- Ultra-processed food and drink concerns could dampen interest in CSDs
- Alcohol moderation will boost sales of CSDs as a permissible alternative
- Sporting events will provide a short-term boost for CSDs in 2024
- CSDs will continue to quench thirst as summers become hotter
- Scrutiny of plastic waste will see CSD brands zero in on more recyclable packaging

## WHAT CONSUMERS WANT AND WHY

### Usage of carbonated soft drinks

- Spotlight on sugar reduction sees Germans consuming more diet CSDs in 2024
  - Graph 5: consumption of carbonated soft drinks in the last three months, by type, 2024 vs 2023
- CSDs prove popular among Germans in 2024
  - Graph 6: consumption of any CSDs, 2022 vs 2024
- Healthy ingredients will boost the appeal of CSDs with women and German over-65s
- Diet CSDs edge out non-diet in usage frequency
  - Graph 7: frequency of drinking CSDs (either in or out-of-home) in the last three months, 2024
- Germans lean on CSDs for comfort
- Diet CSDs are drunk more often than sugary CSDs, albeit from a lower base
  - Graph 8: frequency of drinking CSDs (either in or out-of-home) in the last three months, NET – weekly, 2024
  - Graph 9: frequency of drinking CSDs (either in or out-of-home) in the last three months, NET – daily, 2024
- Germans aged 16-34 show more interest in diet CSDs than their older counterparts in 2024
  - Graph 10: consumption of sugary CSDs in the last three months, by age, 2020 and 2024
  - Graph 11: consumption of light CSDs in the last three months, by age, 2020 and 2024
- An uptick in on-the-go CSD consumption in 2024
  - Graph 12: consumption of light CSDs, by location, 2020 and 2024
  - Graph 13: consumption of sugary CSDs, by location, 2020 and 2024
- Use streaming tie-ins to appeal to younger German CSD drinkers who prefer to drink them at home
- Boost image of BFY soft drinks to appeal to health-conscious women
  - Graph 14: consumer preference for eating/drinking healthily, by gender, 2024
- CSDs that promote gut health will appeal to Germans

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- Use natural ingredients to premiumise soft drinks for younger Germans
- Premiumise CSDs' image through use of natural ingredients

## Behaviours related to carbonated soft drinks

- Branded soft drinks are still most appealing in terms of flavour
  - Graph 15: behaviours related to CSDs, 2024
- Emphasis on taste is key to winning German CSD drinkers
  - Graph 16: types of carbonated soft drinks bought in the last three months, 2024
- Branded CSDs are consumed more often than own label
  - Graph 17: consumption of CSD brand vs own label, by age, 2024
- Stronger in-store product presentation could further enhance own label CSD visibility
  - Graph 18: attitudes towards branded and own label food and non-alcoholic drink products, 2022
- Ensure affordable own label visibility in-store to attract cash-strapped but impulsive Germans
- Target younger Germans with novel flavours to gain market shares from brands
  - Graph 19: interest in trying CSDs with limited edition flavours, by age, 2024
- Look to fruit juice flavour combinations for inspiration
- Limited editions provide an opportunity for brands to try out new and exciting flavours
- Highlight reformulation of CSDs for a healthier image
- Use natural sweeteners to avoid alienating health-conscious Germans
- Naturally sweetened CSDs appeal to Germans across the board
- Cut the sugar, it's sweet enough!
- Communicate branded CSDs' superior taste to retain cash-strapped Germans

## Attitudes towards carbonated soft drinks

- CSDs with less plastic waste and less-sweet flavours are appealing in 2024
  - Graph 20: attitudes towards CSDs, 2024
- Win over Germans with on-pack claims that communicate plastic waste prevention
- Offer in-store soft drink dispensers to cut down on plastic waste
- Attract energy-seeking Germans with CSD alternatives to energy drinks
  - Graph 21: belief that CSDs are a more acceptable choice for an energy boost than energy drinks, by age, 2024

## Interest in trying CSDs with certain attributes

- Health benefits and no artificial sweeteners are top motivators for Germans when choosing CSDs
  - Graph 22: attributes that would entice a consumer to try a soft drink, 2024
- Win over Germans concerned about the effects of ageing with added health benefits
- CSDs with added health benefits will provide added value to Germans wanting more from CSDs
- Natural herbs will boost image of CSDs as more permissible
  - Graph 23: interest in trying CSDs with herbal ingredients, by age, 2024
- Herbal ingredients target German CSD drinkers aged 16-44

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- Add an element of fun through unexpected textures
  - Graph 24: interest in CSDs with textured additions, by age, 2024
- Inspire curiosity among 16-24 year old Germans with a new mouth feeling from a CSD
- A growing number of Germans are moderating their alcohol intake, broadening growth opportunities for cocktail-inspired CSDs
  - Graph 25: consumers who have limited alcohol consumption in the last 12 months or don't drink alcohol, % of respondents, by age, 2023
- Low-/no-alcohol drinks face stiff competition from CSDs in the alcohol moderation space
- Adult CSDs with the taste and look of cocktails can gain market share from alcoholic drinks
- Taste and appearance will be key in attracting moderators

## LAUNCH ACTIVITY AND INNOVATION

- The share of CSD launches overtakes juice in 2023
  - Graph 26: non-alcoholic beverage launches, by sub-category, 2018-23
- Coca-Cola Company and REWE lead soft drink launch innovation
  - Graph 27: CSDs launches, by top ten companies, 2021-23
- Less-sweet flavours are emerging in German CSD launches
- Sweeter flavours combined with milder flavours appease Germans with less of a sweet tooth
- PET is the most popular packaging material for CSDs
  - Graph 28: CSD launches, by packaging material, 2018-23
- Branded CSDs dominate launches in 2024
  - Graph 29: CSDs launches, by brand vs private label, 2013-23
- Affordability of own label appeals to price-savvy Germans aged 16-34
- Sustainability and environmentally friendly claims take a back seat in times of economic strain
  - Graph 30: CSDs launches, by top claims, 2021-23
- Coca-Cola's 'label-less' packaging in the UK could streamline the recycling process
- Germans expect CSD brands to do more to prevent plastic waste
- Focus on low-calorie and sugar-free CSDs
  - Graph 31: CSDs launches by leading 'minus' claims, 2021-23
- Low/no/reduced calorie and sugar free CSDs target Germans trying to lose weight
- Coca-Cola aims to cut calories by 2025
- Coca-Cola focuses on sugar-free launches in 2023
  - Graph 32: Coca-Cola CSD launches, by avg sugar levels per 100ml, 2013-23
- Average sugar content in CSDs rose slightly in 2023 compared to 2022
  - Graph 33: CSDs launches, by average sugar content, 2013-23
- PepsiCo aims to reduce sugar content by 2025
- Brands show novelty through new packaging rather than new products

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- Graph 34: branded CSD launches, by type, 2021-23
- Graph 35: private-label CSD launches, by type, 2021-23
- Suntory to make all PET bottles sustainable by 2030

## Advertising and marketing activity

- Coca-Cola generates excitement with an interactive AI campaign
- Fanta stirs the senses with a mystery flavour
- fritz-kola promotes tolerance with its BVG campaign
- SodaStream emphasises its minimal plastic waste
- Pepsi highlights that zero sugar isn't boring

## MARKET SHARE

- Own labels receive a tailwind from the income squeeze in 2023
- Own labels gain share of value sales...
- ...while big players lose ground in volume sales

## MARKET SIZE, SEGMENTATION AND FORECAST

- Expect volume sales to remain stable, while value sales will rise due to rising costs
- Retail value sales of carbonated soft drinks, by segment, 2021-23
- Retail volume sales of carbonated soft drinks, by segment, 2021-23
- Value sales will increase as price of sugar rises
- Volume sales will stagnate as Germans seek out healthier options

## 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 central forecast methodology

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



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