

FORTIFIED AND FUNCTIONAL FOOD & DRINK – GERMANY – 2023



Targeting an ageing society with age-appropriate functional concepts, and focusing on new and more-natural ingredients, could ensure further category growth.



A Mintel Analyst, Global Analyst



Fortified And Functional Food & Drink - Germany - 2023

This report looks at the following areas:

- Market drivers for functional/fortified food & drink, including the impact of inflation, an ageing population and personal health issues
- Consumption of functional/fortified food & drink products, with 16-24s being the keenest users
- Types of functional/fortified food & drink products consumed, with breakfast being a key opportunity
- Functional/fortified food & drink products with immune health claims are the most sought-after, but relaxation and good sleep are taking on a more-prominent role
- Added vitamins/minerals are most commonly consumed as part of functional/fortified food & drink, but new ingredients (adaptogens/nootropics) hold potential
- Behaviours and attitudes related to functional/fortified food & drink, including the need for credibility and affordable product offerings
- Recent product launch activity and innovation



Targeting an ageing society with age-appropriate functional concepts, and focusing on new and more-natural ingredients, could ensure further category growth.

Overview

Penetration of fortified/functional food/drink remained at around half of adults between 2020-23. **Consumers aged 16-24** (85%) are the **keenest users of functional/fortified food/drink**, with a higher percentage of male consumers (54%) compared to females (49%). However, the majority of those aged 45+ (64%) do not use functional/fortified food/drink

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versions. This is partly because many of the categories that are **most prominent for functional claims** (eg **snack bars**, energy drinks) have a young consumer base.

Reassuringly for brands, the market relies more on **financially stable Germans**, who feel more confident and are least likely to cut back their spending on these foods.

An ageing society means changing medical needs and a need for **innovation to support consumers to stay active and healthy for longer**. **A reduction in taboo topics, such as menopause, enables more-direct approaches to age-specific benefits**. Thus, brands can look to **extend the use of age-specific functional ingredients in, for example, adult breakfast cereals/spreads, which are also popular among over-55s**.

Germans' interest in adaptogens is still niche, with food/drink lagging behind in innovation compared to skincare and supplements. Still, there is a growth opportunity, particularly if consumer education about the benefits of adaptogens improves and product innovation increases.

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Report Content



EXECUTIVE SUMMARY

- The five-year outlook for fortified and functional food & drink

Market context

- Financial confidence buoys usage of functional/fortified food & drink
- Financial confidence buoys usage of functional/fortified food & drink
- Help Germans in their quest to improve their health post-COVID-19

Mintel predicts

- Reflect demographic changes in product offerings to ensure category growth
 - Graph 1: interest in functional benefits from food/drink (top three), by select generations, 2023
- Address ageing issues openly – no more taboos
- New, natural ingredients could increase the appeal to non-users

Opportunities

- Gut and immune health: a combination that can't be missed
- Leverage the alcohol moderation trend with new ingredient solutions for relaxation
- Dare to blur the lines and create more functional indulgence
- Consider the needs and preferences of the over-45s to drive category growth

MARKET DRIVERS

The German economy

- Economic recovery to follow the 2023 slowdown
 - Graph 2: 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...
- ...confidence and expenditure
 - Graph 3: financial confidence index, 2022 - 23

The impact of the economy on functional and fortified food & drink

- Functional/fortified food & drink has a financially well-off user base
 - Graph 4: changes in fortified/functional food & drink purchase behaviour compared to a year ago, by financial situation, 2023

Public health

- Demographic changes will change medical needs – a forward-looking view focusses on the over-65s

- Graph 5: population structure by age, 2022-30
- Germans agree they are getting less healthy
 - Graph 6: perception of general health for a person of one's age, 2021 vs 23
- Immune health concerns remain prominent after the pandemic's official end
 - Graph 7: confirmed influenza cases per season year, 2018-23
- The gut microbiome is emerging as a cornerstone of overall health
- Prevention is key: Gen Zs and younger Millennials show interest in age-related functional solutions
 - Graph 8: interest in functional benefits from food/drink, by select generations, 2023

WHAT CONSUMERS WANT AND WHY

Consumption of functional & fortified food & drink and frequency

- Half of adults eat fortified and functional food & drink
 - Graph 9: consumption of fortified and functional food % drink, 2020 vs 23
- Scope to appeal to the ageing population with lifestage-oriented benefits
 - Graph 10: consumption of fortified and functional food & drink, by age groups, 2023
- A reduction in taboo topics enables more-direct approaches to age-specific benefits
- Increased frequency of consumption shows users' commitment to the category
 - Graph 11: consumption frequency of functional/fortified food & drink, 2020 vs 2023
- A consistent buyership, but action is needed to drive category growth and utilise the health trend

Types of fortified and functional food & drink consumed

- Penetration of functional/fortified versions is highest in cereals and snack bars vs regular types
 - Graph 12: consumption of regular vs functional/fortified food & drink, by type, 2023
- Breakfast is a key opportunity for fortified/functional foods
 - Graph 13: consumption of functional and fortified food & drink, by top five categories, 2020 and 2023
- Healthier childhood heroes – a way to make breakfast cereals more enticing for the over-45s
- 16-34s have the widest repertoire of fortified and functional foods

Claims related to functional/fortified food & drink consumed

- Immune health is a key element of functional and fortified
- Immune health remains a top priority post-COVID-19
- Create new solutions for immune health
- Target the over-45s with immune-boosting dairy and fruit drinks
 - Graph 14: types of fortified and functional food & drink consumed by 16-44s vs 45+, 2023
- Help relieve tiredness with energy-boosting food & drink
- Help relieve tiredness with energy-boosting food & drink
- Focus on relaxation to help consumers also find better sleep

Ingredients contained in functional/fortified food & drink consumed

- Added vitamins/minerals are most commonly consumed with functional/fortified food & drink
 - Graph 15: ingredients contained in functional/fortified food and drink consumed in the last three months, 2023
- Position probiotics as a key element of a strong immune system
- Added protein is not just for a younger crowd
- Merge skin health with permissible indulgence
- Embrace new ingredients to offer consumers new yet natural solutions to take on their challenges
- Combine functionality with indulgence to become a daily-routine add-on

Behaviours related to functional/fortified food & drink

- Improving one's health is the main consumption reason for functional/fortified food & drink
 - Graph 16: behaviours towards functional/fortified food and drink, 2023
- Consumers' trust and belief in effectiveness are crucial consumption drivers
- Product naturalness is a concern for older consumers
 - Graph 17: agreement with select 'natural' statements related to fortified/functional food/drink, by age, 2023
- Convince over-65s to embrace functional/fortified food & drink with natural ingredients
- Utilise AI-based nutritional support tools to help consumers make the best choices
 - Graph 18: consumers who would find it appealing to get AI-supported guidance for their personal health needs, by age, 2023

Attitudes towards functional/fortified food & drink

- Affordability is a barrier to take-up
 - Graph 19: attitudes towards functional/fortified food & drink, 2023
- Convince over-45s that fortified/functional foods are value for money
 - Graph 20: consumer agreement that fortified/functional food & drink products are worth paying more for compared to regular products, by age, 2023
- Increase value perception of functional/fortified food & drink to increase willingness to buy
- Increase value perception of functional/fortified food & drink to increase willingness to buy
- Explore relaxing ingredients and tap into the alcohol moderation trend

LAUNCH ACTIVITY AND INNOVATION

- Fortified/functional food & drink takes a niche share of total launches in Germany
 - Graph 21: functional food & drink launches, by sub-category, 2021-23
 - Graph 22: total food & drink launches, by share of functional claims, 2021-23
- Room to expand fortified/functional claims beyond drinks
- A mismatch between consumer interest and product offerings
 - Graph 23: functional/fortified food & drink launches, by top ten functional claims, 2023
- Germans' need for energy is reflected in a resurgence of functional/fortified food/drink launches with energy claims

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- Energy claims enter less-typical categories
- Tea diversifies away from 'calming' options
 - Graph 24: functional tea launches by top five functional benefits, 2021-23
- Tea leads for sleep claims, and now targets energy-seeking consumers...
- ...while new categories explore the sleep/relaxation opportunity
- Juice drinks have scope beyond immune support
 - Graph 25: functional juice drink launches, by top five functional benefits, 2021-23
- Functional bars aim for the sports nutrition space
 - Graph 26: functional snack/cereal/energy bar launches, by top functional benefits, 2021-23
- Multivitamins and new nutrients allow for new applications
 - Graph 27: functional and vitamin/mineral-fortified food & drink launches, by selected ingredients*, 2021-23
- Brands lead for fortified/functional food/drink launches, but German retailers have high launch activity
 - Graph 28: functional/fortified food & drink launches, by ultimate company, 2023
 - Graph 29: functional/fortified food & drink launches, by own-label, 2019-23

Advertising and marketing activity

- Actimel capitalises on the German health focus on the immune system by keeping it simple
- 'Cereal addicts anonymous' by Spacies takes a hit at Kellogg's heroes
- Babybel makes a film-like appearance to position itself as a hero of healthy eating with its naturally high calcium and protein levels
- Mighty m.lk and Weetabix team up to elevate breakfast's healthy status

APPENDIX

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

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

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