

FRUIT JUICE, JUICE DRINKS & SMOOTHIES – GERMANY 2022

Value-added, health-boosting options will be crucial if fruit drinks are to win over consumers faced with the greatest cost of living crisis in decades.



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Fruit Juice, Juice Drinks & Smoothies - Germany 2022

This report looks at the following areas:

- The impact of COVID-19 and rising inflation on the fruit juice, juice drinks and smoothies market
- Types of fruit drinks consumed, frequency of consumption and change in consumption habits since 2019
- Reasons for drinking fruit drinks, including an increased vitamin and daily fruit/vegetable intake
- Buying factors for fruit drinks, including flavour, sugar content and naturalness
- Interest in new juice concepts including ingredient provenance
- Attitudes towards and behaviours related to fruit juice, including environment-related behaviours and ingredient-related attitudes
- NPD in fruit drinks including sugar reduction activity, key claims and new flavours



Value-added, health-boosting options will be crucial if fruit drinks are to win over consumers faced with the greatest cost of living crisis in decades.

Overview

After more than two years of living with COVID-19, **many consumers' financial situations have taken a downturn**. As disposable income decreases, consumers pay more attention to pricing and, typically, they buy more own-label products. While own-labels **are already dominant in the fruit drinks market**, **36% of Germans** say they would buy more own-label products if they were forced to make savings in their household budgets.

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16-24s are an important group for frequent consumption of fruit drinks and as younger adults in Germany seem to be relatively well-off financially – **75% of 25-34 year olds describe their current financial situation as healthy or OK** – this is relatively encouraging for sales of fruit drinks.

Flavour, sugar content and naturalness are the key purchase factors for fruit drinks buyers. Price ranks most highly for juice drinks while smoothies are prioritised as a good source of nutrients. **43% of Germans avoid buying products** with low Nutri-Scores and this is challenging for fruit drinks as they are intrinsically high in sugar and tend towards D/E ratings.

Sustainability of food & drink ingredients is becoming an ever-more pressing concern for consumers. As many as **33% of 16-24 year olds who buy 100% fruit juice** say it's important (ie among their top five factors) that the products they buy are sustainable.

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Report Content

EXECUTIVE SUMMARY

Key issues covered in this Report

- Overview
- The five year outlook for fruit juice, juice drinks and smoothies

Market context

- Volume consumption of fruit drinks is declining
 - Graph 1: % annual change in volume sales of fruit juice, juice drinks and smoothies, 2016-21
- Sugar content is being targeted
- Fruit drinks' core consumers are OK financially
 - Graph 2: financial situation, 2022

Mintel predicts

- Market size and forecast
- Market volume on a steadily declining path
- Market value forecast to decline in 2022 and plateau thereafter
- Temporary pandemic-led sales rise in 2020

Opportunities

- Widen the range of health-boosting juices
- Tailor DIY smoothie mixes to younger men
- Tap into consumer demand for energy boosters
- Focus on sustainability initiatives

The competitive context

- Private labels take an important share of value and volume sales
 - Graph 3: company retail market shares of fruit juice, juice drinks and smoothies, 2021
- Quick download resources

MARKET DRIVERS

- German economy hit hard by COVID-19 disruptions
- Strong post-COVID-19 bounceback followed by a period of slower growth
 - Graph 4: key economic data, in real terms, 2019-23
- Supply chain disruptions and production costs are a huge concern for the juice industry
- Consumers need to tighten their belts

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- Graph 5: consumers whose financial situations are worse off since the start of the COVID-19 outbreak, 2020-21
- Fruit drinks' core consumers are OK financially
 - Graph 6: financial situation, by age group, 2021
- German government tackles plastic waste
- Sugar content is also being targeted
- Nutri-score labelling will be challenging for high-sugar categories
- Ageing population supports NPD in fortified fruit drinks
- Soft drinks are a competitive industry

WHAT CONSUMERS WANT AND WHY

Types of juice, juice drinks and smoothies consumed

- The juice category expands its consumer base
 - Graph 7: consumption of juice, juice drinks and smoothies in the last three months, by type, 2019 and 2021
- Increase in frequency of juice consumption
- Younger men are good targets for energy-boosting juices
 - Graph 8: consumption of juice, juice drinks and smoothies once a week or more, by select demographics, 2021
- COVID-19 increases demand for immunity boosters
 - Graph 9: consumption of fruit juice/smoothies freshly made by self or in front of you in the last three months, 2019 and 2021

Reasons for drinking juice, juice drinks and smoothies

- Over half of juice drinkers desire a vitamin boost
 - Graph 10: reasons for drinking juice, juice drinks and smoothies in the last three months, 2021
- Promote vitamin drinks for over-55 women
- Target the highest users of VMS
- Multivitamin drinks will appeal to VMS users
- Juices provide an energy boost for three in 10
- Blur boundaries with sports and energy drinks
- Improved concentration is an NPD avenue

Buying factors for juice, juice drinks and smoothies

- Flavour is crucial to keep consumers engaged
 - Graph 11: most important factors when buying juice, juice drinks and smoothies, 2021
- Sugar and naturalness become more important to fruit juice buyers...
 - Graph 12: most important factors when buying 100% juice, 2019 and 2021
- ...and to smoothie buyers
 - Graph 13: most important factors when buying smoothies, 2019 and 2021
- No added sugar rises in importance for juice drinks

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- Graph 14: most important factors when buying still/sparkling juice drinks, 2019 and 2021
- Juices and smoothies can do more to highlight sustainability initiatives
- Highlighting food waste prevention
- Concentrate on more sustainable formats
- Fruit juices are sought out for functional benefits
 - Graph 15: top three preferred categories for functional health benefits, 2021

Interest in new juice concepts

- Scope for less sweet drinks made with seasonal, organic ingredients
 - Graph 16: interest in select attributes in juice, juice drinks and smoothies, 2021
- Appeal to women with local ingredient claims
- Look to unusual flavours for youth appeal
 - Graph 17: interest in taste/flavour attributes in juice, juice drinks and smoothies, by age, 2021
- Cocktail-inspired juices will appeal to younger drinkers
- Build a health halo with botanicals
 - Graph 18: interest in added ingredients in juice, juice drinks and smoothies, by age, 2021
- Flavours and ingredient provenance are key

Juice drink behaviours and attitudes

- Consumers want environmentally friendly products
 - Graph 19: packaging- and environment-related behaviours towards juice, juice drinks and smoothies, 2021
- Packaging receives attention
- Upcycling ingredients to prevent waste is a key opportunity
 - Graph 20: ingredient- and usage-related behaviours towards juice, juice drinks and smoothies, 2021
- Juices for gut health
- Provide a health halo with herbal ingredients
- Position hearty smoothies as meal replacements

NEW PRODUCT DEVELOPMENT

- Brands take the lead for NPD
 - Graph 21: fruit drink NPD by private labels vs brands, 2015-21
- NPD focuses on sugar reduction
 - Graph 22: juice drinks launches with sugar-related claims, 2015-21
 - Graph 23: average sugar content of juice drinks launches, 2018-21
- Preserve the health halo with natural sweeteners
- Organic launches get back on track
 - Graph 24: juice drink launches with organic claims, 2015-21
- Immunity claims shoot up

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- Graph 25: juice drink launches with functional claims, 2015-21
- Place immunity messaging at the forefront
- Look to fermented ingredients for gut health
- Pregnancy support could warrant more attention
- Go beyond fruits for new flavours
 - Graph 26: juice drink launches with vegetable, herb and spice ingredients, 2015-21
- Novel ingredients add flavour excitement
- Environmental packaging
 - Graph 27: juice drink launches with top three environmentally friendly claims, 2015-21
- Brands highlight their eco-packaging

MARKET SHARE

- Own-labels take overall leadership

Retail market shares of juice, by value, 2020-21

- Eckes-Granini has company market leadership of juices...

Retail market shares of juice, by volume, 2020-21

- ...but private labels are dominant overall

MARKET SEGMENTATION, SIZE AND FORECAST

- Fruit drink sales rose encouragingly in 2020
- Market value forecast to decline in 2022 and plateau thereafter
- Market volume on a steadily declining path

Market segmentation

- Juice drinks and smoothies are growth sectors

APPENDIX

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

- Products covered in this Report
- Abbreviations
- Consumer research methodology
- TURF analysis methodology
- TURF analysis
- 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 forecast and prediction intervals – value
- Market forecast and prediction intervals – volume

Appendix – company retail value and volume shares of fruit juice, 2019-21

- Eckes-Granini has company market leadership of juices

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