

JUICE & JUICE DRINKS – GERMANY – 2020

Following a decline in value sales in 2019, the COVID-19 crisis will provide a 6% boost to sales in 2020. Improving its health image will secure longer-term growth.



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Report Content



EXECUTIVE SUMMARY

- Mintel's perspective

Note on COVID-19

- COVID-19's impact on juice drinks and German consumer behaviour

Market context

- COVID-19 impact on German consumers
- Suffering health image makes users cut back on juice
- Juice sales see major downturn in 2019
- All juice segments in decline, both in value and in volume
 - Graph 1: retail volume sales of juice, 2017-19
 - Graph 2: retail value sales of juice, 2017-19

Mintel predicts

- Without powerful innovation, the market will continue to decline
- Face up to sugar challenge and build on category's strengths and potentials
- COVID-19 expected to lead to immediate spike in growth
- The impact of COVID-19 on juice and juice drinks

What consumers want, and why

- Consumers want: health and nutrition
- Consumers want: flavour and variety
 - Graph 3: most important factors when buying 100% juice, December 2019
- Consumers want: ethical choices
 - Graph 4: preference for juices with ethical ingredients, by age, December 2019
- Consumers want: filling snack options
 - Graph 5: agreement that "Smoothies are filling enough to replace a meal (eg breakfast, lunch)", by age and gender, December 2019

Opportunities

- A natural, flavoursome approach to sugar reduction
- Immunity-boosting juices
- Juice nutritionally close to whole fruits
- Probiotic, gut-friendly juices
- Juice shots as quick-fix health and energy boosters

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- Caffeine-enriched juices to rival RTD coffee
- Customised solutions that respond to consumers' evolving needs

The competitive landscape

- Brands regain lead in value sales, but private label is bigger by volume
- Eckes-Granini retains top position in the juice market
 - Graph 6: leading companies by retail value share (%), 2018-19
- Launch activity dominated by brands, but private label has gained share
 - Graph 7: juice and juice drinks launches, branded vs private label, 2015-19
- Quick download resources

MARKET DRIVERS

- One in four Germans showed higher levels of concern about being exposed to COVID-19
 - Graph 8: "How worried are you about the risk of being exposed to the Coronavirus (also known as COVID-19)?", March 3-16, 2020
- Germans are equally concerned about the impact on their lifestyle
 - Graph 9: "To what extent are you worried about how the outbreak might affect your lifestyle?", March 3-16, 2020
- Sugar remains public enemy #1
- Over half of German adults are overweight or obese, and rates continue to grow
- Government reduction strategy on sugar
- Alcohol reduction trend opens up opportunities for 'adult' soft drinks
 - Graph 10: per capita consumption of pure alcohol among adults (15+), in litres, 1997-2016
- Over 1 in 4 completely abstain from alcohol
- German government targets environmental concerns
- Ageing population in Germany poses a challenge for juice
 - Graph 11: population by age group, 2014-24

WHAT CONSUMERS WANT, AND WHY

Types of juice, juice drinks and smoothies used

- 100% fruit juice the most commonly drunk type
 - Graph 12: types of juice/juice drinks used in the last three months, December 2019
- Usage of all types skews to the young and families with children
 - Graph 13: usage of juice and juice drinks by age and parental status, December 2019
- Homemade juice chimes with younger consumers
- Home-made juice chimes with younger consumers
- Popularity of freshly-made drinks offers opportunities for DIY kits and smoothie boosters

Reasons for drinking juice, juice drinks and smoothies

- A good way to get vitamins, say four in ten
 - Graph 14: reasons for drinking juice, juice drinks and smoothies, December 2019
- Getting vitamins is the top reason
- Respond to COVID-19 health concerns with immunity-boosting juices
- Getting a portion of fruit/vegetables is another key reason, in particular for women
- Scope to position juice drinks as alcohol alternatives
- Alcohol reduction trend calls for grown-up alternatives

Buying factors for juice, juice drinks and smoothies

- Flavour, sugar and naturalness are the key factors influencing choice
 - Graph 15: most important factors when buying juice, juice drinks and smoothies, December 2019
- Flavour is the main purchase driver
 - Graph 16: importance of flavour when buying juice, juice drinks and smoothies, by parental status, December 2019
- 'No added sugar' appeal beats 'low sugar'
 - Graph 17: importance of 'no added sugar' and 'low sugar' when buying juice, juice drinks and smoothies, December 2019
- Naturalness is in high demand
- Natural sugars and sweeteners are generally perceived as healthier than artificial ones
 - Graph 18: perceptions of different types of sugars and sweeteners as healthy, 2018
- Organic is most relevant in the smoothie segment
- Functional claims are more sought after in smoothies than other juice drinks
 - Graph 19: importance of 'functional claims' when buying juice, juice drinks and smoothies, December 2019

Interest in new juice concepts

- Half of people in Germany are interested in trying new concepts
 - Graph 20: interest in trying different product attributes in juice, juice drinks and smoothies, December 2019
- Younger consumers are by far the most adventurous
 - Graph 21: interest in trying different product attributes in juice, juice drinks and smoothies, by select age groups, December 2019
- Strong interest in drinks that are nutritionally close to whole fruits
- Scope for high fibre as part of 'whole fruit' juice proposition
- Digestive health is turning into a hot health issue
- Scope for fermented and probiotic drinks
 - Graph 22: interest in juice, juice drinks and smoothies with 'good' bacteria/fermented ingredients, by age, December 2019
- International inspiration: probiotic juice drinks
- Rival RTD coffee with caffeinated juices

Juice drinks behaviours

- Ethical considerations and sugar concerns have most influence on purchase behaviour
 - Graph 23: behaviours related to fruit juice, juice drinks or smoothies, December 2019
- Ethical ingredients are a key expectation going forward
 - Graph 24: preference to buy fruit juices, juice drinks or smoothies made with ethical ingredients over others (eg fair trade, sustainable), by age, December 2019
- Mintel Food and Drink Trend: Evergreen Consumption
- Concerns over sugar drive over half of juice buyers to limit consumption
- Juice concentrates find wide appeal, especially among younger consumers
 - Graph 25: interest in juice concentrates that can mixed with water to make fruit juice, juice drinks or smoothies, by age, December 2019

Juice drinks attitudes

- Scope for juice shots as quick-fix energy boosters
 - Graph 26: attitudes towards fruit juice, juice drinks or smoothies, December 2019
- Juice shots can address both health and convenience needs
 - Graph 27: agreement that drinking a juice shot give you a quick-fix pick-me-up, by age, December 2019
- Opportunity to tap the healthy snacking trend with 'meal replacement' smoothies
- Half of smoothie buyers trust vegetables to boost the healthiness of juice drinks

LAUNCH ACTIVITY AND INNOVATION

- Spotlight on sugar leading to (modest) reformulation in juice drinks
 - Graph 28: 100% juice and juice drinks launches, average sugar content, 2015-19
- Rise of low/reduced sugar claims in juice drinks
- Room for more 'juice and water' formulation in the market
- Juice brands add vegetables to boost health appeal
- Botanicals a key feature of adult-focused drinks innovation
 - Graph 29: juice and juice drinks NPD featuring spice/herb ingredients, 2016-19
- Market players, including mainstream brands, embracing botanical ingredients
- An area to watch: juice shots
 - Graph 30: shot* formats as a % of juice and juice drink launches, 2016 and 2019
- Botanicals are star ingredients in the rising 'shot' segment
- International inspiration: leverage functional power
- Functional launches cover a wide array of benefits, from energy-boosting to relaxing
- Innocent launches vibrant functional Plus range
- Friya moves from 'superfood' to 'snacking' positioning
- Big focus on sustainability-related claims

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- Graph 31: juice and juice drinks launches with select eco-friendly claims, 2017-19
- Beckers Bester – stand-out sustainable positioning
- Increased use of recycled plastic, with retailers bringing the message to front of pack
- Organic claims see strong uplift in 2019
 - Graph 32: juice and juice drinks launches with organic claims, 2016-19
- New arrivals: Organic Honest Lemonade and Organic Hohes C juice

Advertising and marketing activity

- Hohes C runs emotionally charged campaign: "What do you get up for?"
- Rauch's flagship brand 'Happy Day' also uses an emotive approach
- Valensina TV spot focuses on 100% purity
- Capri Sun TV spot promotes naturalness of its juice drinks
- Punica targets teenagers with TikTok hashtag challenge
- True Fruits attracts attention with provocative ads

MARKET SHARE

- Brands regain lead over private labels in value sales

Retail market share of juice, by value, 2018-19

- Eckes-Granini retains strong lead in the juice market

Retail market share of juice, by volume, 2018-19

- Private labels account for over half of volume sales

MARKET SEGMENTATION, SIZE AND FORECAST

Forecasting during the COVID-19 pandemic

- Note on forecast in response to COVID-19
- Sugar concerns impact market performance
- Longer-term value decline will be more modest
- COVID-19 expected to lead to immediate spike in growth
- The impact of COVID-19 on juice and juice drinks
- COVID-19 impact makes best-case forecast more realistic
- Pure juice dominates both value and volume sales
- All juice segments in decline, both in value and in volume
 - Graph 33: retail volume sales of juice, 2017-19
 - Graph 34: retail value sales of juice, 2017-19
- All juice segments in decline, both in value and in volume

APPENDIX

Appendix – products covered and consumer research methodology

- Products covered in this Report
- Consumer research methodology

Appendix – launch activity and innovation

- Launch activity by subcategory
- Launch activity by storage type
- Launch activity by claim category
- Launch activity by top claims

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

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