# 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.

David Faulkner, Director,
Mintel Food & Drink



MINTEL

# Report Content

## EXECUTIVE SUMMARY

- 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

- 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

# About Mintel Reports: Germany

Access our reports now and get the most accurate, credible and powerful data, insights and analysis. Mintel Reports Germany gives you everything you need to know about what German consumers want and why.

In each report, we're analysing the market, new product innovations and the competitive landscape, as well as consumer behaviours across Germany. Our local analysts, supported by our team of global experts then translate it into what it means for you.

**What makes us unique?**

- A 360-degree view of German markets
- Experienced analysts based in Germany
- Expert-led support from global category experts

**How Mintel Reports Germany will help your business grow:**

01

Identify future opportunities by understanding what German consumers want and why

02

Make better decisions faster by keeping informed on what's happening across your market

03

See the trends and innovations impacting Germany both on a local and global level

**Disclaimer**
This is marketing intelligence published by Mintel. The consumer research exclusively commissioned by Mintel was conducted by a German licensed market survey agent (See Research Methodology for more information).

**Terms and Conditions of use**
Any use and/or copying of this document is subject to Mintel's standard terms and conditions, which are available at http://www.mintel.com/terms

If you have any questions regarding usage of this document please contact your account manager or call your local helpdesk.

**Published by Mintel Group Ltd**
www.mintel.com

**Help desk**

| | |
|---|---|
| UK | +44 (0)20 7778 7155 |
| US | +1 (312) 932 0600 |
| Australia | +61 (0)2 8284 8100 |
| China | +86 (21) 6386 6609 |
| Germany | +49 211 2409023 |
| India | +91 22 4090 7217 |
| Japan | +81 (3) 6228 6595 |
| Singapore | +65 (0)6 818 9850 |



MINTEL