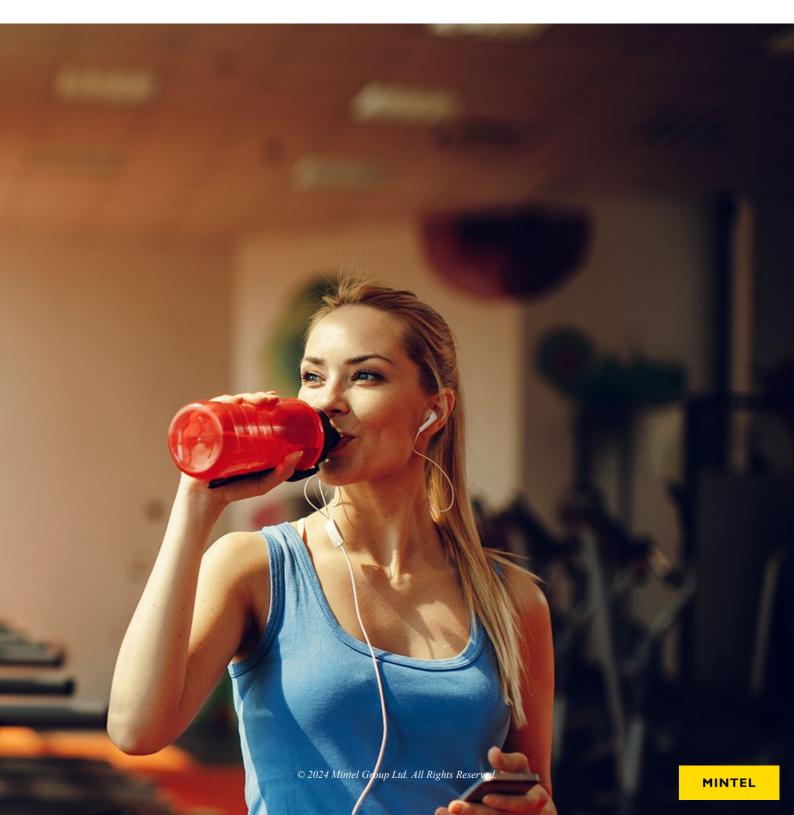
SPORTS & ENERGY DRINKS – GERMANY – 2021

The pandemic has led many Germans to look for ways to raise their energy levels, giving energy drinks a significant boost but sports drinks slumber.



Heidi Lanschützer, Deputy Research Director, Germany



Report Content

EXECUTIVE SUMMARY

Key issues covered in this Report

Overview

The impact of COVID19 on sports & energy drinks

- COVID-19's impact on sports & energy drinks
- COVID-19's impact on sports & energy drinks and German consumer behaviour

Market context

- Help consumers enhance their energy levels
- Entice older consumers with functional enhancements
 - Graph 1: interest in select functionalities in sports drinks and energy drinks/shots, over-55s vs all adults, 2021

Mintel predicts

- · Energy drinks overshadow sports drinks
- Market size & forecast following the COVID-19 outbreak energy drinks
- Energy drinks forecast to reach €2.5 billion by 2026
- Market size & forecast following the COVID-19 outbreak sports drinks
- Sports drinks are forecast to lose €3 million of sales by 2026

Opportunities

- Immunity benefits will endure post-COVID-19
- · Relaxation/mood boosting is a new avenue for sports and energy drink brands
- · Natural ingredients are key to broadening appeal
- · Brands can energise adjacent categories
- Plastic bottle replacement is an opportunity for sports and energy drink syrups
- · Younger adults look for the most ethical options

The competitive landscape

- · Red Bull has a commanding leadership of energy drink sales
 - Graph 2: company retail market shares of energy drinks, by volume and value, 2020
- · Private labels take the majority share of sports drink sales
 - Graph 3: company retail market shares of sports drinks, by value and volume, 2020
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 - Graph 4: key economic data, in real terms, 2019-23
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- · Sports and energy drinks are most commonly consumed at work
 - Graph 5: consumption of sports and energy drinks when working/studying, 2020
- · One in five sports drink consumers drink them when working
 - Graph 6: occasions when sports drinks are consumed, 2020
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 - Graph 7: occasions when energy drinks are consumed, 2020
- · The hospitality sector is important to energy drink sales
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 - Graph 8: frequency of working out for at least 30 minutes, by age, 2021
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- · The ageing population offers a challenge and an opportunity

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 - Graph 10: consumption of sports and energy drinks/shots in the last three months, 2020 and 2021
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- · Brain health claims are most prominent

- · Iced-tea-based energy drinks have more potential in Germany
- · Hemp gains interest
- · Encouraging trial of new and novel flavours
- Novel flavour cactus fruit
- 'Your room is your stage'
- · Inspiration for more on-trend flavours
- Transportive flavours appeal to Germans' love of travel
- · Target ethical consumers by promoting the causes you care about

MARKET SHARE

Company retail market shares of energy drinks, by value and volume, 2019-20

- · Red Bull has a strong lead in energy drinks
- · Red Bull notably increases market leadership in 2020
- · Private label's volume share is three times higher than value
- · Red Bull's lead is largely thanks to its humorous advertising

Company retail market shares of sports drinks, by value and volume, 2019-20

- · Coca-Cola is the leading sports drink manufacturer
- · Coca-Cola gains share at the primary expense of private labels...
- ...but private labels have a commanding lead in both value and volume sales

MARKET SIZE, SEGMENTATION AND FORECAST

- · Energy drinks have gone from strength to strength
- Energy drinks forecast to reach €2.5 billion by 2026
- · Sports drinks' future is less optimistic
- Sports drinks are forecast to lose €3m of sales by 2026

COVID-19 SCENARIO PERFORMANCE

- Mintel's approach to predicting the impact of COVID-19
- Fundamental differences in how COVID-19 is affecting consumer markets
- · The risk of vaccine-resistant strains of COVID-19 adds huge uncertainty
- · Extended recovery is more in line with central forecasts
- All scenarios forecast strong growth for energy drinks
- · Extended disruption exacerbates sports drinks' woes
- · COVID-19 market disruption: risks and outcomes

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- Abbreviations
- · Consumer research methodology
- A note on language

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- · Forecast methodology fan chart
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- Rapid COVID-19 recovery scenario outline
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