

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.



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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
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- Quick download resources

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 - Graph 6: occasions when sports drinks are consumed, 2020
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 - Graph 7: occasions when energy drinks are consumed, 2020
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- The ageing population offers a challenge and an opportunity

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Sports & Energy Drinks – Germany – 2021

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- Brain health claims are most prominent

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- 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

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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- Forecast methodology – fan chart
- Market size and forecast – energy drinks - value
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- Central COVID-19 disruption scenario outline
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- Scenario methodology

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