

# 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
- Quick download resources

## MARKET DRIVERS

- COVID-19: market context
- The impact of COVID-19 on the German economy
  - Graph 4: key economic data, in real terms, 2019-23
- COVID-19 has sapped people's energy
- 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
- Energy drinks provide stamina for nights out
  - Graph 7: occasions when energy drinks are consumed, 2020
- The hospitality sector is important to energy drink sales
- Almost nine in 10 Germans exercise
  - Graph 8: frequency of working out for at least 30 minutes, by age, 2021
- COVID-19 has boosted interest in exercise
  - Graph 9: exercise locations, 2021
- Put more emphasis on the gaming usage occasion
- Coffee is a prime competitor to energy drinks
- Fruit drinks compete for the sports usage occasion...
- ...as does alcohol-free beer
- The ageing population offers a challenge and an opportunity

## WHAT CONSUMERS WANT AND WHY

### The usage of sports and energy drinks

- A slight increase in consumer base during the pandemic
  - Graph 10: consumption of sports and energy drinks/shots in the last three months, 2020 and 2021
- Usage frequency defies the pandemic
  - Graph 11: consumption of sports and energy drinks/shots at least once a week, 2020 and 2021
- Male bias persists...
  - Graph 12: consumption of sports and energy drinks/shots at least once a week, by gender, 2021
  - Graph 13: consumption of sports and energy drinks/shots in the last three months, by gender, 2021
- ...as does the youth bias
  - Graph 14: consumption of sports and energy drinks/shots at least once a week, by gender, 2021
  - Graph 15: consumption of sports and energy drinks/shots in the last three months, by gender, 2021
- Sports drinks need to reclaim their place in the sports arena...
  - Graph 16: usage of sports nutrition products and sports drinks, by age, 2021

# Sports & Energy Drinks – Germany – 2021

---

- ...and raise their credentials as performance enhancers
  - Graph 17: formats of sports nutrition used, 2021

## Reasons for drinking sports drinks and energy drinks/shots

- Sports drinks are consumed for an energy boost
  - Graph 18: reasons for drinking sports drinks, 2021
- Energy drinks own the energising space
  - Graph 19: reasons for drinking energy drinks/shots, 2021
- Men are the most important targets for sports and energy drinks
  - Graph 20: key differences in reasons to drink energy drinks/shots, by gender, 2021
  - Graph 21: key differences in reasons for drinking sports drinks, by gender, 2021
- Sports and energy drinks need to prove superiority over CSDs
  - Graph 22: select reasons to drink CSDs, 2020
- Flavour NPD is crucial to keep users engaged
- Red Bull's seasonal editions

## Interest in functionalities of sports and energy drinks

- Immunity support receives greater interest
  - Graph 23: interest in select functionalities in sports drinks and energy drinks/shots, 2021
- Enhance the mood-boosting effects of exercising
  - Graph 24: interest in sports drinks or energy drinks/shots that boost mood, by age, 2021
- Mood-boosting drinks warrant more NPD
- Relaxation ingredients can be a new avenue for sports/energy drinks
- Functional enhancements can expand appeal to older drinkers
  - Graph 25: interest in select functionalities in sports drinks and energy drinks/shots. by age, 2021

## Interest in sports and energy drinks made with select ingredients/bases

- Juice and water are the most appealing new styles for sports/energy drinks
  - Graph 26: interest in sports drinks and energy drinks/shots made with select ingredients, March 2021
- Juice-based sports drinks need an added advantage
- Sports and energy waters have already gained attention
- Water brands launch sports and energy variants
- RTD iced tea and coffee-based sports drinks
  - Graph 27: interest in trying sports drinks made with RTD coffee and tea, by age, 2021
- RTD tea and coffee competitors for the energy space
- Plant-based drinks are expected to grow in the future
  - Graph 28: interest in sports drinks made with dairy and plant-based drinks, by gender, 2021
- Plant-based energy drinks fit with the rise of vegan claims

## Encouraging factors to consume more sports and energy drinks

- Natural ingredients and less-sweet flavours are key areas for NPD
  - Graph 29: factors that would encourage drinkers to consume more sports drinks or energy drinks/shots, 2021
- Natural ingredients and less-sweet flavours appeal
  - Graph 30: consumers who would be encouraged to consume more sports drinks or energy drinks/shots if they were exclusively made with natural ingredients or tasted less sweet, by age, 2021
- Sugar reduction needs to be a priority
- Use vegetables to reduce sweetness
- Customisation options attract younger drinkers
  - Graph 31: consumers who would be encouraged to consume more sports drinks or energy drinks/shots if they could be customised, by age, 2021
- Scope for more still sports and energy drinks
  - Graph 32: consumers who would be encouraged to consume more sports drinks or energy drinks/shots if had less/no carbonation, by age, 2021

## Behaviours and attitudes towards sports and energy drinks

- Flavour trumps ethical credentials
  - Graph 33: behaviours and attitudes towards sports drinks and/or energy drinks/shots, 2021
- Prioritise ethical credentials when aiming at younger drinkers
- Ethical brands are worth a price uplift
  - Graph 34: select ethical attitudes towards sports drinks and energy drinks/shots, by age, 2021
- Gamers are important consumers
- Workplace energy is an important marketing message
  - Graph 35: use of sports/energy drinks when at work, by gender and age, 2021

## LAUNCH ACTIVITY AND INNOVATION

- Rising presence of B group vitamins in sports and energy drinks
  - Graph 36: launches of sports & energy drinks with select energy ingredients\*, 2010 and 2020
- Sugar content gets reduced...
  - Graph 37: average sugar content in sports & energy drinks vs CSDs, 2010-20
- ...as more launches feature sugar-reduction claims on pack
  - Graph 38: NPD with sugar-reduction claims in sports & energy drinks vs CSDs, 2010-20
- Monster Energy leads in sugar-reduction claims
  - Graph 39: NPD with sugar-reduction claims in sports & energy drinks, by leading companies, 2010 and 2020
- On-trend ingredient: BCAA
- Immunity boosters have more scope
- Brain health claims are most prominent

# Sports & Energy Drinks – Germany – 2021

---

- 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

### **Appendix – market size and central forecast methodology**

- Forecast methodology
- Forecast methodology – fan chart
- Market size and forecast – energy drinks - value
- Market forecast and prediction intervals – energy drinks - value
- Market size and forecast – sports drinks - value
- Market forecast and prediction intervals – sports drinks - value

### **Appendix – COVID-19 scenario performance methodology and assumptions**

- Scenario performance - energy drinks
- Scenario performance - sports drinks
- Rapid COVID-19 recovery scenario outline
- Central COVID-19 disruption scenario outline
- Extended COVID-19 disruption scenario outline
- Scenario methodology

# 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

**BUY THIS REPORT NOW**

**€2600.00 | £2195.00 | \$2995.00\***

[store.mintel.com](https://store.mintel.com) | [store@mintel.com](mailto:store@mintel.com)

Americas: +1 (312) 932 0400  
China: +86 (21) 6032 7300  
Germany: +49 (0) 211 3399 7411  
India: +91 22 4445 1045  
Singapore: +65 6653 3600  
Thailand: +66 2 821 5122  
UK: +44 (0) 20 7606 4533

\*These prices are correct at time of publication, but are subject to change due to currency fluctuations.

**MINTEL**



### 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](http://www.mintel.com)

email: [store@mintel.com](mailto:store@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