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.
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
  - 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

MARKET DRIVERS

• COVID-19: market context
• The impact of COVID-19 on the German economy
WHAT CONSUMERS WANT AND WHY

The usage of sports and energy drinks
- Graph 10: consumption of sports and energy drinks/shots in the last three months, 2020 and 2021
- Graph 11: consumption of sports and energy drinks/shots at least once a week, 2020 and 2021
- 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
- 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
- Graph 16: usage of sports nutrition products and sports drinks, by age, 2021
- Graph 17: formats of sports nutrition used, 2021

Reasons for drinking sports drinks and energy drinks/shots
- Graph 18: reasons for drinking sports drinks, 2021
- Graph 19: reasons for drinking energy drinks/shots, 2021
- 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
- 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
- Graph 23: interest in select functionalities in sports drinks and energy drinks/shots, 2021
- 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
- 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
- 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
- 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
- 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
- Graph 29: factors that would encourage drinkers to consume more sports drinks or energy drinks/shots, 2021
- 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
- Graph 31: consumers who would be encouraged to consume more sports drinks or energy drinks/shots if they could be customised, by age, 2021
- 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
- Graph 34: select ethical attitudes towards sports drinks and energy drinks/shots, by age, 2021
- Gamers are important consumers
- Gamers are important consumers
- Graph 35: use of sports/energy drinks when at work, by gender and age, 2021

LAUNCH ACTIVITY AND INNOVATION
- Graph 36: launches of sports & energy drinks with select energy ingredients*, 2010 and 2020
- Graph 37: average sugar content in sports & energy drinks vs CSDs, 2010-20
- Graph 38: NPD with sugar-reduction claims in sports & energy drinks vs CSDs, 2010-20
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
- 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
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