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
- Graph 4: key economic data, in real terms, 2019-23
  • COVID-19 has sapped people’s energy

- 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
  - Graph 8: frequency of working out for at least 30 minutes, by age, 2021
  - 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
- 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
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 | reports@mintel.com

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