

# TEA & HOT CHOCOLATE – GERMANY – 2022

Functional benefits for physical and emotional wellbeing will be crucial in driving market growth for both tea and hot chocolate.



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# Tea & Hot Chocolate - Germany - 2022

## This report looks at the following areas:

- The impact of COVID-19 on tea and hot chocolate consumption
- How consumers' tea and hot chocolate usage has increased since 2020
- Consumers' interest in different features of tea and hot chocolate, including support for overall wellbeing, added functional benefits and a desire for new formats and flavours
- How launch activity reflects consumer demand, especially for ethical and more environmentally friendly products



Functional benefits for physical and emotional wellbeing will be crucial in driving market growth for both tea and hot chocolate.

## Overview

Tea and hot chocolate have benefitted hugely from COVID-19 measures as retail value sales **increased by 8.9% for tea and 6.3% for hot chocolate** in 2020, with still relatively strong growth for 2021. Tea supported holistic wellbeing but also relaxation, whereas hot chocolate offered comfort and indulgence.

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# Report Content

## EXECUTIVE SUMMARY

### Key issues covered in this Report

- Overview

### The impact of COVID-19 on tea & hot chocolate

- COVID-19 boosts tea and hot chocolate sales in 2020/21
- COVID-19's impact on tea and hot chocolate and German consumer behaviour

### Market context

- 9 in 10 Germans drink tea, and 7 in 10 hot chocolate
  - Graph 1: overall usage of tea and hot chocolate, 2021
- More time at home as a result of COVID-19 measures boosts tea and hot chocolate retail sales
- Concerns about sustainability and environment are important to German tea and hot chocolate drinkers

### Mintel predicts

- The pandemic boosts tea and hot chocolate sales
- Market size & forecast following the COVID-19 outbreak
- Long-term growth of tea and infusion retail value sales driven by premiumisation
- Market size & forecast following the COVID-19 outbreak
- COVID-19 outbreak gives a value sales boost to hot chocolate in 2020/21

### Opportunities

- Help tea drinkers support their physical and emotional wellbeing
- Position tea as a stress buster
- Offer escapism with transportive tea flavours
- Tap into cold-brew tea's potential as a BFY alternative to soft drinks
- Elevate the hot chocolate experience with chocolate spheres

### The competitive landscape

- Brands lead value sales of tea, but private labels have a strong footing in volume sales
  - Graph 2: company retail market share of tea, by value and volume, 2020
- Quick download resources

## MARKET DRIVERS

- COVID-19: market context
- The impact of COVID-19 on the German economy

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- Graph 3: key economic data, in real terms, 2019-23
- Consumers' environmental concerns are growing
- Sustainable and socially responsible farming is important to German consumers
- Tea benefits from focus on holistic health
- More time at home as a legacy of COVID-19 bodes well for tea and hot chocolate
- Supply chain issues impact the tea market

## WHAT CONSUMERS WANT AND WHY

### Drinking habits of tea and hot chocolate

- Most Germans drink tea relatively infrequently
  - Graph 4: frequency of drinking different types of tea at home or in the workplace, 2021
- A quarter of German tea drinkers drink six types of tea
  - Graph 5: repertoires of tea drunk at home or in the workplace, by age, 2021
- Hot chocolate serves as an occasional drink
  - Graph 6: frequency of drinking hot chocolate at home or in the workplace, 2021

### Interest in tea with selected benefits

- German tea drinkers are interested in targeting specific aspects of health
  - Graph 7: interest in tea with certain characteristics, 2021
- Tea drinkers want functional benefits
- Focus on immune system through ingredient innovation
- Raise the game for tea as go-to drink for relaxation and stress relief
- Ayurvedic ingredients can elevate holistic wellness proposition
- International inspiration: teasing the senses to enhance relaxing activities
- Strong interest in tea that supports digestive health
- Interest in gut health sparks innovation in probiotic teas
- Three in ten tea drinkers look for energy support
- Energy boosters in the German tea market

### Behaviours related to tea

- Almost three in four German tea drinkers trust herbal tea's health benefits
  - Graph 8: behaviours related to drinking and buying tea, 2021
- Great openness to trying new teas bodes well for flavour innovation
- Transportive tea flavours can offer escapism from the daily grind
- Travelling to far-off places with destination flavours
- Tea can capitalise on alcohol moderation trend, especially for social occasions
- Cold-brewed tea has potential to compete as a better-for-you soft drink alternative
- Cold-brew tea holds wide appeal as a soft drink alternative

## Interest in innovation in tea & hot chocolate

- NPD opportunities within the health space are manifold
  - Graph 9: interest in certain hot drinks, 2021
- Tapping into new formats and more engaging occasions with hot chocolate
- Chocolate spheres lend themselves well to tap the gifting occasion
- Sizeable interest in tea with nootropic ingredients
- International inspiration for nootropic ingredients

## Attitudes towards hot drinks

- Protecting the environment matters to German tea drinkers
  - Graph 10: attitudes towards hot drinks, 2021
- More environmentally friendly tea bag solutions are needed
- Innovative solutions to make tea (packaging) more environmentally friendly
- Promote advantages of loose tea's minimal packaging
- Instill trust by highlighting ethical credentials
- Socially responsible tea brands gain consumer support
- Strong interest in sugar/calorie-reduced hot chocolate
- Sugar reduction needs to be a focus NPD area in hot chocolate
  - Graph 11: consumers who agree there should be a wider range of hot chocolate drinks with reduced sugar content, by gender and age, 2021
- Natural sugar alternatives also appeal widely in hot chocolate
- Hot chocolate with functional benefits appeals to half of Germans

## LAUNCH ACTIVITY AND INNOVATION

### Tea launch activity and innovation

- Brands lead for tea NPD
  - Graph 12: tea launches by brands vs private label, 2017-21
- Tea launches with ethical & environmental claims see a jump
- Tea launches with ethical & environmental claims see a jump
- Ethical and organic tea claims are the most common
  - Graph 13: tea launches by top 10 claims, 2017 and 2021
- Tea brands launch more ethical offerings
- Ethical claims have yet more opportunities
  - Graph 14: tea launches by ethical claims, 2017 and 2021
- Steady focus on stress & sleep functional claims
  - Graph 15: tea launches by top five functional claims, 2017 and 2021
- Highlight teas for stress relief, relaxation and improved sleep

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- Digestive health is a theme of tea NPD
- Teas with added vitamins and minerals can boost sales
- Stand out by adding vitamins and minerals
- Tailor functional tea to women's needs
- International inspiration: special health teas offer scope for innovation
- Make loose tea a more premium experience
- Reduced plastic use appeals to consumers

### Hot chocolate launch activity and innovation

- More than half of hot chocolate products are ethical and/or organic
  - Graph 16: hot chocolate launches, by top 10 claims, 2017-21
- Consumers demand more focus on health and wellbeing in hot chocolate
- Hot chocolate launches see a stronger focus on functionality and added benefits
- Brands spice up the hot chocolate category
- Premium launches with innovative flavours
- Create an engaging experience at home
- Highlight convenience with pods and sachets

### Advertising and marketing activity

- Teekanne launches organic range
- Traveling with Meßmer teas
- Koawach highlights waking up with Guarana

## MARKET SHARE

- Teekanne and Ostfriesische Tee Gesellschaft lead German tea market

### Retail market share of tea and infusions, by value and volume, 2019-20

- Teekanne leads the German tea market
- Private labels have a strong footing in tea volume sales, but lost share in 2020

## MARKET SIZE, SEGMENTATION AND FORECAST

### Retail value and volume sales and forecast of tea & infusions, 2016-26

- Tea and infusions expected to grow in value until 2026, while volumes struggle
- Tea and infusion value sales projected to grow by 14% over 2021-26...
- ...but tea and infusions volumes are forecast to shrink by 2% over 2021-26

### Retail sales of tea and infusions, by segment, 2019-20

- Infusions driving the market

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- Infusions drive the market, outperforming tea by some distance

## **Retail value and volume sales and forecast of hot chocolate, 2016-26**

- Hot chocolate category increased sales by 3.6% in 2021
- Hot chocolate value sales projected to be stable (+1%) over 2021-26...
- ...while hot chocolate volume sales are forecast to shrink by 1% over 2021-26

## **Retail sales of hot chocolate, by segment, 2019-20**

- Hot chocolate value sales grow by more than 6%
- Hot chocolate retail market grew by 6% in value terms
- Hot chocolate retail volume sales increased by 5%

## **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 – tea – value
- Market size and forecast – tea – volume
- Market forecast and prediction intervals – tea – value
- Market forecast and prediction intervals – tea – volume
- Market size and forecast – hot chocolate – value
- Market size and forecast – hot chocolate – volume
- Market forecast and prediction intervals – hot chocolate – value
- Market forecast and prediction intervals – hot chocolate – volume

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