

THE FUTURE OF WATER, SPORTS AND ENERGY DRINKS: 2020

Global Annual Review: what's new and what's next for the water, sports and energy drink market.



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Report Content

- A look back and a look ahead

THE BIG STORIES

- Mintel's perspective

Coca-Cola brings its big brand power into energy drinks

- Watch out Monster and Red Bull: Coca-Cola takes on the energy drinks market
- Coca-Cola Energy will have a different flavour in the US
- Young Americans reduce energy drink usage
- Coke Energy prioritises flavour and function above naturalness

The plastic pollution problem prompts more people to choose reusable bottles

- Plastic pollution continues to deteriorate the planet-friendly image of bottled water
 - Graph 1: 'Due to environmental concerns, I'm drinking less bottled water compared to a year ago,' by age, 2019
- Consumers around the world switch to refillable bottles
- As plastic bottle bans are introduced, the share of water launches in non-bottle formats rises
 - Graph 2: bottled water launches, by package type, 2015-19

China's exercise and fitness boom is good news for sports and energy drink sales

- China embraces physical exercise as sales of sports and energy drinks climb
- Sports and energy drinks are well-placed to benefit from sportier lifestyles in China
- Sports drink brands manoeuvre to capitalise on China's sports and fitness trend

IN THE NEXT TWO YEARS

- Mintel's perspective

Caffeine will premiumise sparkling waters (and grab share from energy drinks)

- People are tired, but more caffeine is not necessarily the answer
- Sparkling flavoured waters with caffeine have potential to mainstream
- Energy waters appeal to today's self-conscious consumer

Eye health is a functional health area to watch

- Functional health will drive innovation in bottled water
- Functional claims continue to increase in water launches
 - Graph 3: functional water launches, by functional claim, 2016-19
- Waters and energy drinks with eye health claims will be more visible

The Future of Water, Sports and Energy Drinks: 2020

- Certain nutrients have recognised eye health benefits

Performance energy drinks will develop with added protein

- Gatorade adds its weight to performance energy drinks, taking on Bang Energy and Reign
- Opportunity to flag protein content and add probiotics
 - Graph 4: health benefits that motivate purchase of nutrition or performance drinks, top 5, December 2018
- Plant-based essential amino acids will compete with animal-based proteins

IN FIVE YEARS AND BEYOND

- Mintel's perspective
- Gel water can modernise the promise of functional hydration for bottled water
- DNA-based exercise plans will extend to DNA-based sports drinks
- Concerns about public drinking water will offset volume declines in bottled water

KEY MARKET DATA

- The biggest bottled water markets by volume in 2019
- Top five fastest growing energy drinks markets
- Sports drinks: per capita consumption (litres)
- Top five claims in bottled water launches
- Top five flavours in European flavoured water launches
- Top five claims in sports drink launches

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