

# THE FUTURE OF WATER, SPORTS & ENERGY DRINKS: 2019

Global Annual Review: what's now and what's next for the water, sports and energy drinks markets.



Alex Beckett, Director -  
Mintel Food & Drink



# Report Content

- A look back, and a look ahead

## THE BIG STORIES

- Mintel's perspective

### **The discovery of microplastics threatens the trusted image of bottled water**

- Bottled water's plastic problem worsens, following revelations about microplastic contamination
- Bottled water should be 100% free of microplastics
  - Graph 1: 'Bottled water should be 100% free of plastic particles (eg microplastics)', 2018
- In-home microplastic filters, like Mitte's, may be commonplace in future

### **Coca-Cola strengthens its focus on sports and energy drinks with BodyArmor and (TBC) Coca-Cola Energy**

- Watch out Gatorade: Coke buys a stake in BodyArmor
- High sugar and artificial ingredients are barriers to consuming nutrition and performance drinks
- Coca-Cola plans to launch a natural energy drink...and Monster isn't happy

### **Bottled water commits to recycling targets, as PepsiCo makes reusable bottles a more customisable option**

- Bottled water faces up to its plastic problem
- Consumers switch to reusable bottles in place of buying single-use plastic bottled water
- The attraction of reusable bottles is encouraged through Drinkfinity and Sodastream

## IN THE NEXT TWO YEARS

- Mintel's perspective

### **Flavoured water brands will be more transparent about ingredients**

- La Croix lawsuit suggests that greater clarity is needed about natural flavours
- Drinks recipes are scrutinised
- European consumers prefer juice flavouring in flavoured water
  - Graph 2: 'The flavour of flavoured water should come from a small amount of natural juice rather than more processed ingredients,' 2018

### **Relaxing benefits will be promised in waters and energy drinks**

- Consumers around the world need help to de-stress
- Relaxing benefits will feature more prominently in bottled water and (anti) energy drinks
- Love Hemp Water's popularity suggests Brits are interested in CBD water

## **Traditional medicines will inspire energy drink flavours for parents – a frequent user group of energy drinks**

- Parents are surprisingly frequent users of energy drinks and want to try new flavours
- Asian innovation around traditional medicinal ingredients (eg Ayurveda, TCM) can migrate to global energy drink markets
- Western parents will trust energy drinks that offer a holistic health appeal

## **IN FIVE YEARS AND BEYOND**

- Mintel's perspective
- Healing crystals will bring holistic healing powers to luxury bottled water
- South Pacific-sourced electrolytes? Sports waters will contain electrolytes from named oceans
- Fast-melt powdered energy shots to launch in developing markets

## **KEY MARKET DATA**

- US adults are the world's biggest consumers of sports drinks
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  - Graph 3: sports drinks, retail market volume consumption per capita, 2018 (est)
- The rise of pineapple flavours in European flavoured water NPD
- India has been the fastest growing bottled water market over the past five years
- Five largest bottled water markets continue to enjoy solid volume growth
- Red Bull leads global energy drink launch activity

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Australia	+61 (0)2 8284 8100
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Singapore	+65 (0)6 818 9850