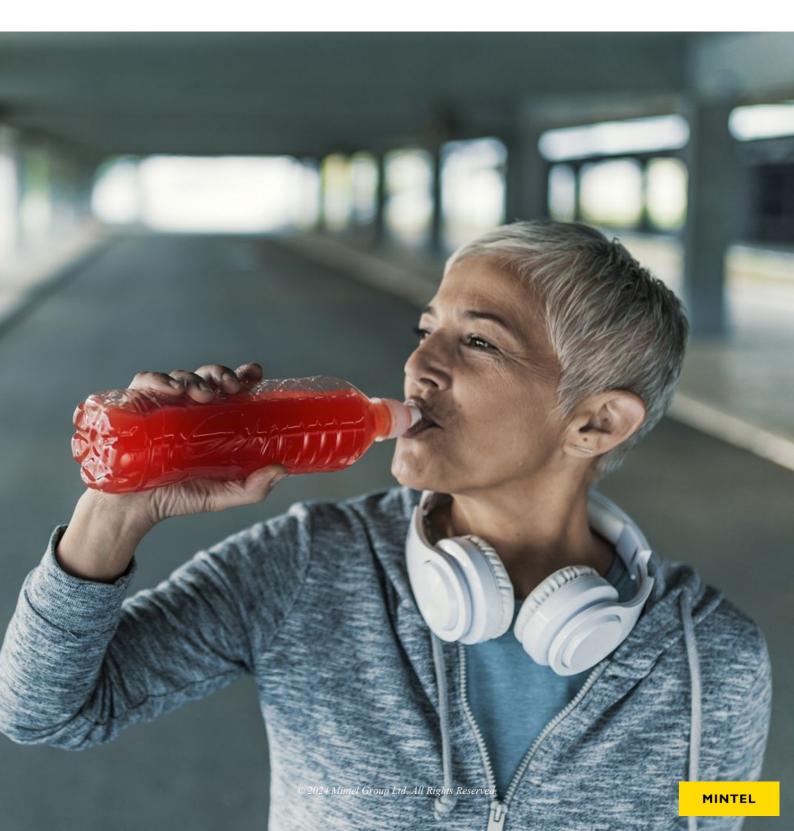
THE FUTURE OF WATER, SPORTS & ENERGY DRINKS: 2019

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





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
- · US adults are the world's biggest consumers of sports drinks
 - 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

Disclaimer

This is marketing intelligence published by Mintel. The consumer research exclusively commissioned by Mintel was conducted by a licensed market survey agent (see Research Methodology for more information).

Terms and Conditions of use

Any use and/or copying of this document is subject to Mintel's standard terms and conditions, which are available at http://www.mintel.com/terms

If you have any questions regarding usage of this document please contact your account manager or call your local helpdesk.

Published by Mintel Group Ltd

www.mintel.com

email: store@mintel.com

Help desk

UK	+44 (0)20 7778 7155
US	+1 (312) 932 0600
Australia	+61 (0)2 8284 8100
China	+86 (21) 6386 6609
India	+91 22 4090 7217
Japan	+81 (3) 6228 6595
Singapore	+65 (0)6 818 9850