

# Sports and Energy Drinks - UK - 2021

Report Price: £2195 | \$2995 | €2600

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

## This report looks at the following areas:

- The impact of COVID-19 on the sports and energy drinks market
- Launch activity in 2020 and opportunities for 2021
- Barriers for using sports and energy drinks
- Factors prioritised when choosing sports and energy drinks
- Consumer behaviours and attitudes towards sports and energy drinks

Surprisingly, users of sports/energy drinks (33%) are more likely than non-users (26%) to find the advertising for energy drinks off-putting. The 'laddish' marketing messages perhaps still associated with this category, or the focus on a hardcore energising proposition, are likely to underpin this. A new, more inclusive approach with 'softer' and more widely relevant messages around energy are needed.

As with the wider drinks market, sports and energy drinks sales were hit in 2020 by the loss of higher-value occasions through foodservice and on-trade venues, which faced closures for a large part of the year and restrictions when operational. Unlike many other drinks, however, sports and energy drinks did not enjoy a retail boost from switching from the on-trade. Stay-at-home lifestyles stymied the need for an energising or performance-enhancing proposition, and there was a dramatic fall in impulse purchasing.

Challengingly, out-of-home impulse purchasing looks set to be curbed in the long term compared to pre-COVID levels due to the anticipated long-term shift towards working at home. Targeting at-home usage through larger pack sizes, formats that are designed to be diluted, and products that are designed for exercising at home or aiding concentration when working from home offer promising routes to offset this decline.

More can be done to harness the accelerated interest in functional benefits in the category, with 72% of category users and 14% of non-users agreeing that sports/energy drinks with added health benefits appeal to them. Products



“While the greater spotlight on health arising from the COVID-19 pandemic presents big opportunities for the market, the long-term shift towards working at home will curb impulse purchasing.”

– Emma Clifford, Associate Director – Food and Drink Research UK

## Buy this report now

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100

## Sports and Energy Drinks - UK - 2021

Report Price: £2195 | \$2995 | €2600

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

which support the immune system and gut health would be particularly timely given the spotlight on these aspects of health.

MINTEL

### What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

### Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

### Buy this report now

Visit [store.mintel.com](https://store.mintel.com)

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

## Table of Contents

### OVERVIEW

- Key issues covered in this report
- COVID-19: market context
- Economic and other assumptions
- Products covered in this Report

### EXECUTIVE SUMMARY

- Impact of COVID-19 on sports and energy drinks

Figure 1: Short-, medium- and long-term impact of COVID-19 on sports and energy drinks, 2021

- Robust growth over 2017-19; sales dropped 9% in 2020
- The market will enjoy a rapid rebound

Figure 2: Total UK value sales of sports and energy drinks, 2016-26

- Spotlight on health should support exercise
- The rise in working at home poses challenges
- The ageing population remains a major challenge to the market
- Companies and brands
- Red Bull and Monster buck the volume decline in energy drinks; sharp declines across the board in sports drinks

Figure 3: Leading brands' value sales in the UK retail energy drinks market, 2018/19-2020/21

- High levels of innovation centring on exciting flavours and naturalness; brands up the ante on sustainability
- Adspend on energy drinks significantly drops in 2020
- Lucozade sets the bar on key metrics

Figure 4: Attitudes towards and usage of selected brands, 2021

- The consumer
- Penetration of sports and energy drinks at 39% and 31% respectively

Figure 5: Frequency of drinking sports drinks, energy drinks and energy shots, 2021

- Standard variants lead in usage

Figure 6: Types of sports and energy drinks drunk, 2021

- A need to expand relevancy of sports drinks to attract new users

Figure 7: Reasons for not drinking sports drinks, 2021

- A softer energising proposition could expand appeal of energy drinks

Figure 8: Reasons for not drinking energy drinks, 2021

### What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

### Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

### Buy this report now

Visit [store.mintel.com](https://store.mintel.com)

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

- Huge potential remains around naturalness; notable demand for new flavours**  
 Figure 9: Factors prioritised when choosing sports/energy drinks, 2021
- A need to assuage concerns over impact on sleep; innovation in added health benefits and mental focus would be timely**  
 Figure 10: Behaviours relating to sports and energy drinks, 2021
- Formats designed to be diluted appeal to two fifths of drinkers; advertising for energy drinks is off-putting for many**  
 Figure 11: Attitudes towards sports and energy drinks, 2021

ISSUES AND INSIGHTS

- Innovation in added health benefits and mental performance would be timely
- A need to assuage concerns over impact on sleep
- Big potential in formats designed to be diluted before use
- A need to explore new and more inclusive advertising angles

THE MARKET – KEY TAKEAWAYS

- Robust growth over 2017-19
- Sales dropped 9% in 2020
- The market will enjoy a rapid rebound
- Spotlight on health should support exercise and increase demand for better-for-you products
- Government steps up focus on health
- The rise in working at home poses threats and opportunities
- The ageing population remains a major challenge to the market

MARKET SIZE AND FORECAST

- Impact of COVID-19 on sports and energy drinks**  
 Figure 12: Short-, medium- and long-term impact of COVID-19 on sports and energy drinks, 2021
- Robust growth over 2017-19**
- Sales drop 9% in 2020**  
 Figure 13: Market size for sports and energy drinks, 2016–2026
- The market will enjoy a rapid rebound
- Lockdown and restrictions continue to hamper sales in 2021
- Spotlight on health should support exercise; working at home poses challenges

What's included

- Executive Summary
- Full Report PDF
- Infographic Overview
- Powerpoint Presentation
- Interactive Databook
- Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 14: Total UK value sales of sports and energy drinks, 2016-26

Figure 15: Total UK volume sales of sports and energy drinks, 2016-26

- **Market drivers and assumptions**

Figure 16: Key drivers affecting Mintel's market forecast, 2015-2025 (prepared on 21 June 2021)

- **Learnings from the 2008/09 recession**

Figure 17: Annual growth of sales of sports and energy drinks, by volume and value, 2008-12

- **Forecast methodology**

## MARKET SEGMENTATION

- **COVID-19 hits sales of sports drinks the hardest**

Figure 18: Total UK value and volume sales of sports and energy drinks, by segment, 2019-21

- **Energy drinks saw a more moderate decline in 2020**

## MARKET DRIVERS

- **Physical activity levels had shown signs of improvement pre-COVID-19**
- **Impressive sugar reduction achieved in response to Soft Drinks Industry Levy**
- **Government steps up focus on health**
- **Restrictions on volume promotions and ad ban confirmed**
- **Delayed deposit return scheme penned for 2024 at the earliest**
- **Impacts of Britain's new trade relations will be limited for sports and energy drinks**
- **The ageing population remains a major challenge to the market**
- **A more inclusive message and added health benefits could help to attract older consumers**

Figure 19: Trends in the age structure of the UK population, 2015-25

## COMPANIES AND BRANDS – KEY TAKEAWAYS

- **Red Bull and Monster buck the volume decline in energy drinks**
- **Sharp declines across the board in sports drinks**
- **Flavour innovation aims to people's sense of adventure**
- **Health and naturalness continue to be key NPD trends**
- **Rockstar and Purdey's relaunch in 2021**
- **Brands up the ante on sustainability**

## What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

## Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

## Buy this report now

Visit [store.mintel.com](https://store.mintel.com)

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

- Adspend on energy drinks significantly drops in 2020
- Lucozade sets the bar on key metrics

## MARKET SHARE

- **Red Bull and Monster buck the volume decline in energy drinks**  
Figure 20: Leading brands' sales and shares in the UK retail energy drinks market, 2018/19-2020/21
- **Sharp declines across the board in sports drinks**  
Figure 21: Leading brands' sales and shares in the UK retail sports drinks market, 2018/19-2020/21

## LAUNCH ACTIVITY AND INNOVATION

- **Flavour innovation aims to people's sense of adventure**
- **Red Bull looks to watermelon and cactus fruit**
- **Monster disrupts by taking inspiration from cocktails and nitro coffee**
- **Lucozade follows citrus with raspberry**  
Figure 22: Selected launches of energy drinks featuring exciting flavours, 2021
- **Rockstar increases caffeine level in reformulated core drinks range**
- **Health and naturalness continue to be key NPD trends**
- **Purdey's rebrands and expands within the functional space**  
Figure 23: Purdey's rebrand and launch activity, 2021
- **Tenzing claims a first with its plant-based BCAA energy drink**
- **Virtue launches Clean Energy drinks into supermarkets**  
Figure 24: Virtue Clean Energy Strawberry & Lime Flavoured Clean Energy Yerba Mate, UK, 2021
- **AG Barr launches Rubicon Raw Energy range**  
Figure 25: Rubicon RAW products, 2021
- **Lucozade targets the natural energy market**  
Figure 26: Lucozade Revive line, 2020
- **Good Earth, Good Energy launches**
- **Healthy energy drink, Crave Drinks, launches in UK**
- **Train Your Gut unveils 'world's first probiotic sports drink'**
- **Grenade launches and expands Grenade Energy**
- **'Anti-energy' drink Slow Cow Mind Cooler launched in UK after overseas success**
- **Red Bull relaunches Zero with new recipe**
- **Brands continue to look to alternative formats**
- **Brands up the ante on sustainability**

## What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

## Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

## Buy this report now

Visit [store.mintel.com](https://store.mintel.com)

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

- **Lucozade boosts the sustainability of its packaging**
- **Tenzing rolls out carbon labelling**

## ADVERTISING AND MARKETING ACTIVITY

- **Adspend on energy drinks significantly drops in 2020**  
Figure 27: Total above-the line, online display and direct mail advertising expenditure on sports and energy drinks, 2019-june 2021
- **Lucozade Energy launches a £10 million 'It's On' campaign**
- **Raheem Sterling adorns new Lucozade Sport 'Always Believe' drink**
- **Lucozade Sport launches £2.5 million summer campaign in 2021**
- **Tenzing unveils first national TV campaign**
- **Tenzing sets the bars on sustainability**
- **Boost Drinks launches Choose Now campaign...**
- **...and celebrates local communities**
- **Rockstar launches 'Life is your Stage' platform**
- **Monster HydroSport announces partnership with England Rugby League**
- **Grenade teams up with dance troupe Diversity**

## BRAND RESEARCH

- **Brand map**  
Figure 28: Attitudes towards and usage of selected brands, 2021
- **Key brand metrics**  
Figure 29: Key metrics for selected brands, 2021
- **Brand attitudes: Lucozade has a strong trusted, high quality and good value image**  
Figure 30: Attitudes, by brand, 2021
- **Brand personality: Red Bull, Lucozade and Monster score highly on the fun factor**  
Figure 31: Brand personality – macro image, 2021
- **Lucozade seen as most refreshing, delicious and traditional**  
Figure 32: Brand personality – micro image, 2021
- **Brand analysis**
- **Lucozade sets the bar on key metrics**  
Figure 33: User profile of Lucozade, 2021
- **Red Bull has the most fun image, but is also seen as the most overrated**  
Figure 34: User profile of Red Bull, 2021

## What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

## Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

## Buy this report now

Visit [store.mintel.com](https://store.mintel.com)

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

- **Monster enjoys high brand satisfaction and frequent usage among its users**

Figure 35: User profile of Monster Energy, 2021

- **Limited usage of Rockstar translates into a weak brand image**

Figure 36: User profile of Rockstar, 2021

- **Carabao headline**

Figure 37: User profile of Carabao, 2021

- **Reading word clouds**

## THE CONSUMER – KEY TAKEAWAYS

- **Penetration of sports and energy drinks at 39% and 31% respectively**
- **Standard variants lead in usage**
- **A need to expand relevancy of sports drinks to attract new users**
- **A softer energising proposition could expand appeal of energy drinks**
- **Huge potential remains around naturalness**
- **Favourite flavour trumps a new flavour, but still notable demand for newness**
- **A need to assuage concerns over impact on sleep**
- **Innovation in added health benefits and around mental focus would be timely**
- **Formats designed to be diluted appeal to two fifths of drinkers**
- **Advertising for energy drinks is off-putting for many**

## IMPACT OF COVID-19 ON CONSUMER BEHAVIOUR

- **One in three adults make exercise a higher priority**

Figure 38: Consumers who say doing exercise is a higher priority for them since the COVID-19 outbreak, by gender, 2021

- **Participation in exercise and frequency increases...**
- **...however, a countertrend has also emerged**

Figure 39: Exercise frequency, 2020 and 2021

- **COVID-19 forces people to get creative to keep fit...**
- **People turn to home workouts**

Figure 40: Taking part in more home workouts as a result of the COVID-19 outbreak, 2020

- **Public transport out; walking and cycling in**
- **Weight management in the spotlight**
- **COVID-19 brings environment into further spotlight**

## What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

## Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

## Buy this report now

Visit [store.mintel.com](https://store.mintel.com)

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100



The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

## USAGE OF SPORTS AND ENERGY DRINKS

- **Penetration of sports and energy drinks at 39% and 31% respectively**  
Figure 41: Frequency of drinking sports drinks, energy drinks and energy shots, 2021
- **Overall usage is heavily skewed towards the younger generation**  
Figure 42: Overall usage of sports drinks, energy drinks and energy shots, by gender and age, 2021
- **Standard variants lead in usage**  
Figure 43: Types of sports and energy drinks drunk, 2021

## BARRIERS TO DRINKING SPORTS AND ENERGY DRINKS

- **A need to expand relevancy of sports drinks to attract new users**  
Figure 44: Reasons for not drinking sports drinks, 2021
- **A softer energising proposition could expand appeal of energy drinks**  
Figure 45: Reasons for not drinking energy drinks, 2021
- **Flavoured energy waters could address concerns**

## CHOICE FACTORS FOR SPORTS AND ENERGY DRINKS

- **Huge potential remains around naturalness**
- **Natural ingredients appeal to one in three**
- **Spotlight plant ingredients to drive natural connotations**  
Figure 46: On-pack labelling on a multipack of Tenzing Natural Energy Drink, 2019  
Figure 47: Factors prioritised when choosing sports/energy drinks, 2021
- **Favourite flavour trumps a new flavour, but still notable demand for newness**
- **Larger packs are most popular**

## BEHAVIOURS RELATING TO SPORTS AND ENERGY DRINKS

- **A need to assuage concerns over impact on sleep**  
Figure 48: Behaviours relating to sports and energy drinks, 2021
- **Energy drinks brands can also move into the relaxation area**  
Figure 49: Launches of Driftwell and Soulboost brands, US, 2021
- **Innovation in added health benefits would be timely**  
Figure 50: Behaviours relating to sports and energy drinks, by usage of sports and energy drinks, 2021
- **A focus on mental performance offers big potential**

## What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

## Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

## Buy this report now

Visit [store.mintel.com](https://store.mintel.com)

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

## Sports and Energy Drinks - UK - 2021

Report Price: £2195 | \$2995 | €2600

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

MINTEL

Figure 51: Xite Nootropic Energy Drink, 2021

- **Scope to target the at-home exercise occasion**

Figure 52: Science in Sports launch of the Turbo+ range for indoor training, 2021

### ATTITUDES TOWARDS SPORTS AND ENERGY DRINKS

- **Formats designed to be diluted appeal to two fifths of drinkers**
- **Dilutable formats also offer potential around customisation**

Figure 53: Attitudes towards sports and energy drinks, 2021

Figure 54: Attitudes towards sports and energy drinks, by usage of sports and energy drinks, 2021

- **Advertising for energy drinks is off-putting for many**

### APPENDIX – DATA SOURCES, ABBREVIATIONS AND SUPPORTING INFORMATION

- **Abbreviations**
- **Consumer research methodology**

### APPENDIX – MARKET SIZE AND FORECAST

- **Forecast methodology**

Figure 55: UK value sales of sports and energy drinks, best- and worst-case forecast, 2021–26

Figure 56: UK volume sales of sports and energy drinks, best- and worst-case forecast, 2021–26

### What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

### Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

### Buy this report now

Visit [store.mintel.com](https://store.mintel.com)

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100



## About Mintel

Mintel is the **expert in what consumers want and why**. As the world's leading market intelligence agency, our analysis of consumers, markets, product innovation and competitive landscapes provides a unique perspective on global and local economies. Since 1972, our predictive analytics and expert recommendations have enabled our clients to make better business decisions faster

Our purpose is to help businesses and people grow. To find out how we do that, visit **[mintel.com](https://www.mintel.com)**.