

## Sports and Energy Drinks - China - July 2019

Report Price: £3302.97 | \$4460.00 | €3717.16

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



“Continuously growing awareness and participation of sports and fitness drive the robust growth of sports and energy drinks, but as more drinks include functionality claims related to health, sports and energy drinks need to reinforce their strength on positioning and convenience to compete against them.”

– **Loris Li, Category Director**

This report looks at the following areas:

- **Position sports drinks for multiple purposes related to health**
- **Bold attempts of ingredients may lead to further growth**
- **On-the-go occasions are vital for sports and energy drinks**

The sports and energy drinks market has grown faster than the overall soft drinks market in recent years. Chinese consumers’ increasing awareness and participation in sports and fitness activities is a key driver behind the growth, and the fast-growing fitness business will create further usage opportunities for these drinks.

As more segments introduce health-related claims to attract consumers, sports and energy drinks need to better differentiate themselves from other drinks by positioning and convenience. More education to differentiate sports and energy drinks and by expanding usage occasions can help drive future growth as well.

**BUY THIS  
REPORT NOW**

**VISIT:**  
[store.mintel.com](http://store.mintel.com)

**CALL:**  
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

**EMAIL:**  
[reports@mintel.com](mailto:reports@mintel.com)

### DID YOU KNOW?

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

# Sports and Energy Drinks - China - July 2019

Report Price: £3302.97 | \$4460.00 | €3717.16

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

## Table of Contents

### Overview

What you need to know

Covered in this Report

Excluded

### Executive Summary

The market

Growth remain robust but acceleration slowing down

Figure 1: Best- and worst-case value sales forecast of energy drinks, China, 2014-24

Figure 2: Best- and worst-case volume sales forecast of energy drinks, China, 2014-24

Figure 3: Best- and worst-case value sales forecast of sports drinks, China, 2014-24

Figure 4: Best- and worst-case volume sales forecast of sports drinks, China, 2014-24

Increasing awareness of health and fitness, and more participation drives growth

Companies and brands

Leading companies maintain their position but see shares shrinking

Figure 5: Leading companies' value share in energy drink market, China, 2016-18

Figure 6: Leading companies' value share in sports drink market, China, 2016-18

More flavours, ingredients, claims and types of packaging drive the growth

The consumer

Four out of five respondents have consumed sports and energy drinks in the last 12 months

Figure 7: Sports and energy drinks penetration, April 2019

Although sporting occasions more common for sports and energy drink usage, there is potential to increase usage in other occasions

Figure 8: Sports and energy drinks consumption occasions, April 2019

Consumers need further education to distinguish between sports and energy drinks

Figure 9: Sports and energy drinks consumption purpose, by user type, April 2019

When choosing sports and energy drinks, flavour and nutrition are both important

Figure 10: Sports and energy drinks choosing factor, April 2019

Probiotics and prebiotics are most desired new ingredients

Figure 11: Interested ingredients of sports and energy drinks, April 2019

Consumers are getting more sophisticated in sports and energy drinks

Figure 12: Attitudes towards sports and energy drinks ingredients, April 2019

Figure 13: Attitudes towards sports and energy drinks functions, April 2019

What we think

### Issues and Insights

Position sports drinks for multiple purposes related to health

The facts

The implications

Figure 14: LIFE AID Product Line, June 2019

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](http://store.mintel.com)

**CALL:** 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 |

**EMAIL:** [reports@mintel.com](mailto:reports@mintel.com)

# Sports and Energy Drinks - China - July 2019

Report Price: £3302.97 | \$4460.00 | €3717.16

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

**Bold attempts of ingredients may lead to further growth**

The facts

The implications

Figure 15: Orange-Lemon Flavoured Energy Drink with Natural Ingredients, France, July 2018

**On-the-go occasions are vital for sports and energy drinks**

The facts

The implications

Figure 16: F6 SuperShot Plant-Based Energy Drink, China, July 2018

## The Market – What You Need to Know

Growth remain robust but rate slowing down

Increasing awareness of health and fitness, and more participation drive growth

Fiercer competition from other soft drinks with health claims

## Market Size and Forecast

Market growth of energy drinks remains robust

Figure 17: Best- and worst-case value sales forecast of energy drinks, China, 2014-24

Figure 18: Best- and worst-case volume sales forecast of energy drinks, China, 2014-24

Sports drink sees its growth slowing down

Figure 19: Best- and worst-case value sales forecast of sports drinks, China, 2014-24

Figure 20: Best- and worst-case volume sales forecast of sports drinks, China, 2014-24

## Market Factors

More and more consumers seek to solve their issues of sub-health status

Fast-developing fitness business will drive more needs of on-the-go sports and energy drinks

Other soft drinks categories develop health claims and target the same consumers group

## Key Players – What You Need to Know

Leading companies maintain their position but see shares shrinking

More flavours/ingredients, more health claims and types of packaging drive the growth

## Market Share

Uncertainty has dragged Red Bull's growth

Figure 21: Leading companies' value share in energy drink market, China, 2016-18

Mizone still leads sports drink market after staggering in 2016

Figure 22: Leading companies' value share in sports drink market, China, 2016-18

Specialised brands have increased their visibility in the market

Figure 23: CPT Tmall Banner, June 2019

## Competitive Strategies

Diversified flavours help to drive sports drink market growth

Figure 24: Top 10 flavours of sports drink, China, 2014-18

Figure 25: Mizone new flavours – China, 2018-19

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](http://store.mintel.com)

**CALL:** 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 |

**EMAIL:** [reports@mintel.com](mailto:reports@mintel.com)

# Sports and Energy Drinks - China - July 2019

Report Price: £3302.97 | \$4460.00 | €3717.16

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

Figure 26: Top 10 flavours of energy drink, China, 2014-18

Besides vitamin and energy, manufacturers have introduced more claims on overall health and products being healthy

Figure 27: Top 10 claims of sports drink, China, 2014-18

Figure 28: Top 10 claims of energy drink, China, 2014-18

Multiple types of packaging may help for multi-usage occasions

Figure 29: Packaging of sports and energy drink, China, 2014-18

## Who's Innovating?

More visibility of protein products

Figure 30: Betale Protein Water, China, December 2018

Nature and organic energy booster

Figure 31: Sambazon Organic Amazon Energy Drink – Acai Berry, June 2019

Cross-over and new variants

Figure 32: Coca Cola Energy Drink, Spain, April 2019

Figure 33: Mizone + Variants, April 2019

Innovation in packaging makes powder more convenient

Figure 34: EZY PRO Protein Shake, June 2019

## The Consumer – What You Need to Know

There is potential to increase usage in occasion other than sporting

Consumers need further education to distinguish between sports and energy drinks

When choosing sports or energy drinks, flavour and nutrition are both important

Probiotics and prebiotics are the most desired new ingredients

## Penetration of Sports and Energy Drinks

More than two thirds have consumed sports and energy drinks, respectively

Figure 35: Sports and energy drinks penetration, April 2019

Difference of usage and frequency on 25-29 year olds

Figure 36: Sports and energy drinks penetration, by age group, April 2019

Geographic difference of penetration lies in regions instead of city tiers

Figure 37: Sports and energy drinks penetration, by city tier, April 2019

Figure 38: Sports and energy drinks penetration, by region, April 2019

## Consumption Occasion

Sports or exercising occasions are no-doubt the most popular

Figure 39: Sports and energy drinks consumption occasions, April 2019

Opportunities brought by lifestyle in tier one cities

Figure 40: Sports drinks consumption occasions, by city tier, April 2019

Figure 41: Energy drinks consumption occasions, by city tier, April 2019

## Consumption Purpose

Relieving fatigue is more pursued by consumers

Figure 42: Sports and energy drinks consumption purpose, April 2019

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](http://store.mintel.com)

**CALL:** 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 |

**EMAIL:** [reports@mintel.com](mailto:reports@mintel.com)

## Sports and Energy Drinks - China - July 2019

Report Price: £3302.97 | \$4460.00 | €3717.16

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

Consumers see sports and energy drinks sources of hydration

Replenishing vitamin becomes common practice

Consumers need further education to better differentiate sports and energy drinks

Figure 43: Sports and energy drinks consumption purpose, by user type, April 2019

Key selling points targeting 30-39 year olds are energy and vitamins

Figure 44: Sports and energy drinks consumption purpose, by age group, April 2019

More education to tier two and lower consumers

Figure 45: Sports and energy drinks consumption purpose, by city tier, April 2019

### Choosing Factors

Flavour also matters when it comes to choose sports and energy drinks

Figure 46: Sports and energy drinks choosing factor, April 2019

Nutritional content is also important driven by awareness on health

Sugar content is not widely perceived as threat in sports and energy drink category

Figure 47: ProSupps Lcarnitine Advanced Series, China, June 2019

Opportunity for premiumisation since less sensitive on pricing and trust in branding

Females and tier one city residents care more about sugar content

Figure 48: Sports and energy drinks choosing factor, by gender, April 2019

Figure 49: Sports and energy drinks choosing factor, by city tier, April 2019

Different marketing strategies for different age groups

Figure 50: Sports and energy drinks choosing factor, by age group, April 2019

### Interest in Ingredients

Probiotics is the most anticipated ingredient

Figure 51: Interested ingredients of sports and energy drinks, April 2019

Collagen also draws attention by skin benefits

Concern on caffeine intake drives the needs of caffeine alternatives

Figure 52: Cola Flavoured Nutritious Drink with Green Tea Extract, China, July 2018

Consumers anticipate protein to enhance immunity

Figure 53: Interested ingredient of sports and energy drinks, by age group, April 2019

Males are in general more interested in energy-related ingredients

Figure 54: Interested ingredient of sports and energy drinks, by gender, April 2019

Needs vary in different regions

Figure 55: Interested ingredient of sports and energy drinks, by city tier, April 2019

Figure 56: Interested ingredient of sports and energy drinks, by region, April 2019

### Attitudes towards Sports and Energy Drinks

Consumers are getting more sophisticated on ingredients

Figure 57: Attitudes towards sports and energy drinks ingredients, April 2019

Potential for penetrating to more occasions

Figure 58: Attitudes towards sports and energy drinks functions, April 2019

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](http://store.mintel.com)

**CALL:** 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 |

**EMAIL:** [reports@mintel.com](mailto:reports@mintel.com)

## Sports and Energy Drinks - China - July 2019

Report Price: £3302.97 | \$4460.00 | €3717.16

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

### Meet the Mintropolitans

#### More consumption, driven by more fitness participation

Figure 59: Sports and energy drinks penetration, by consumer classification, April 2019

Figure 60: Sports drinks usage occasions, by consumer classification, April 2019

Figure 61: Energy drinks usage occasions, by consumer classification, April 2019

#### Content and brand are important for MinTs to choose sports and energy drinks

Figure 62: Sports and energy drinks choosing factors, by consumer classification, April 2019

### Appendix – Market Size and Forecast

Figure 63: Market value of energy drinks, China, 2014-18

Figure 64: Market volume of energy drink, China, 2014-18

Figure 65: Market value of sports drink, China, 2014-18

Figure 66: Market volume of sports drink, China, 2014-18

### Appendix – Methodology and Abbreviations

Methodology

Fan chart forecast

Abbreviations

BUY THIS  
REPORT NOW

**VISIT:** [store.mintel.com](http://store.mintel.com)

**CALL:** 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 |

**EMAIL:** [reports@mintel.com](mailto:reports@mintel.com)