



**TREATT**

**TOP 10  
FASTEST  
GROWING**

*Flavours*

**Part 2: Sports and  
Energy Drinks**

**2022**

# WHAT'S YOUR FLAVOUR?

This report gives a brief overview of the top flavours globally, looking specifically at Sports and Energy drinks.

Our research has included extensive data gathering with GlobalData and Mintel. All statements, facts and figures in this report are validated and verifiable.

## TOP TAKEAWAYS OF THE GLOBAL BEVERAGE MARKET

- Citrus continues to command a place in the top 5 beverage flavours globally.
- Sports drinks are adding functionality and formats, moving to powder/liquid to support at home exercising, and personalisation.
- Energy drinks are looking to more natural formulations (natural not synthetic caffeine for example and less sugar).
- One of the defining megatrends driving growth and purchasing behaviour remains health and wellbeing. However, there are signs of a new consciousness among consumers in taking personal action on the environment.
- The growing importance of natural ingredients is highlighted in a report by Fior Markets in May 2021, which reports that the 'global organic food and beverages market' is expected to grow from USD 255.2 billion in 2020 and to reach USD 849.7 billion by 2028, growing at a CAGR of 16.42% during the forecast period 2021-2028.
- Supply chain transparency will only become more important as ingredient provenance comes under increasing scrutiny - GlobalData report that 85% of consumers globally say that information on what is in their food and drink is of major importance to them.

It is a fast-moving landscape but a very exciting time for the beverage industry globally.

Here are a few highlights from around the world, looking specifically at Sports & Energy drinks.

### NORTH AMERICA

Across the Americas, NA is by far the largest market for sports and energy drinks, but Latin America is expected to witness the strongest growth in the coming 12-18 months. Younger consumers are driving interest in energy drinks with better-for-you ingredients. Both sports and energy brands are investing in improving their healthy image with a continued focus on natural formulations and sugar reduction - streamlining ingredients lists and using more plant-based ingredients. Along with sugar, artificial ingredients are one of the key barriers to consumption

of sports drinks and this is a key consideration when the functionality of the ingredients is a key selling point.

Global Data forecast the energy drinks category will register full-year annual volume growth of 7% in 2022, as the lifting of COVID-19 restrictions on social gatherings will boost out-of-home consumption. Furthermore, many young consumers are foregoing alcoholic beverages in favour of energy drinks.

### UK/EUROPE

UK consumers are by far the biggest market, but Poland and Norway are the key growth opportunity markets for sports and energy drinks. Although liquid format sports drinks are the most popular, innovation in sports drink brands is increasingly moving beyond liquid formats and into gels, powders and tablets. These formats are more convenient and support the continuing move towards at home exercise along with being more environmentally friendly and allowing an element of personalisation which is a growing trend.

44% of UK sports drink users say that sports drink formats that can be diluted before use (e.g. powders) are appealing (Kantar/Mintel Apr 2021).

Meanwhile, energy drinks are steering innovation towards clean label, with more natural formulations and ingredients in response to ever more health-conscious consumers.

### CHINA

Markets across APAC will see steady value growth across both sports and energy drinks in 2022. Beverages in this space that offer maximum functionality and improved hydration are increasingly seeing the most success. Sports drinks are promoting their electrolyte content along with immune-boosting ingredients, to target a wider consumer base. Energy drink launches continue to promote claims of functional health, such as immune support and fat-burning. In the year to April 2022, Asia has seen a marked increase in energy drink launches featuring 'functional brain and nervous system' claims (Mintel GNPD).

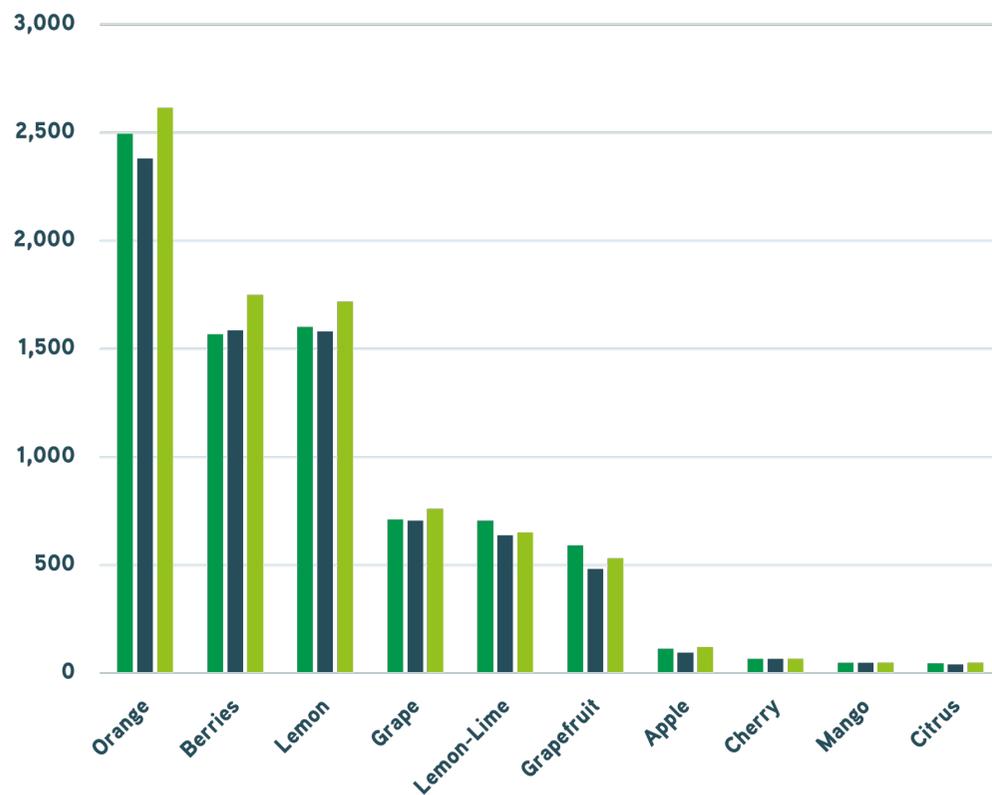
In 2022, the energy drinks category volume will increase by 11.5% (Global Data), while sports drinks volume is forecast to grow by 10%.

# TOP 10 FLAVOURS GLOBALLY: SPORTS & ENERGY

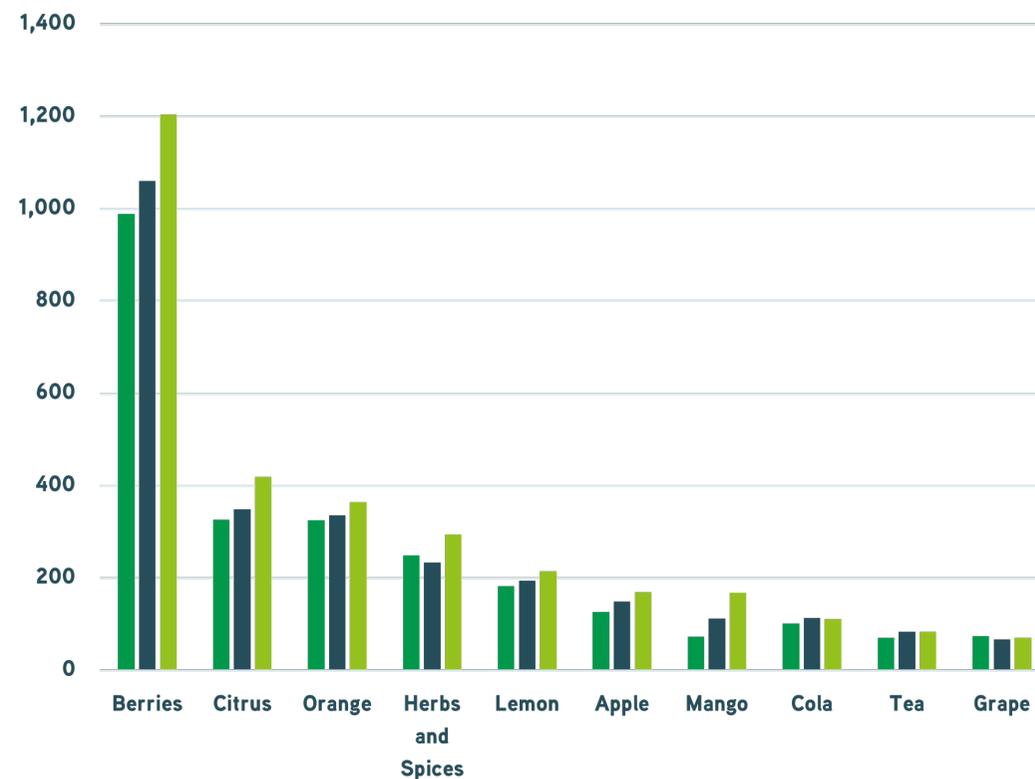
Volume (Million Litres) 2019 - 2021



### Sports Drinks



### \*Energy Drinks



■ 2019
 ■ 2020
 ■ 2021

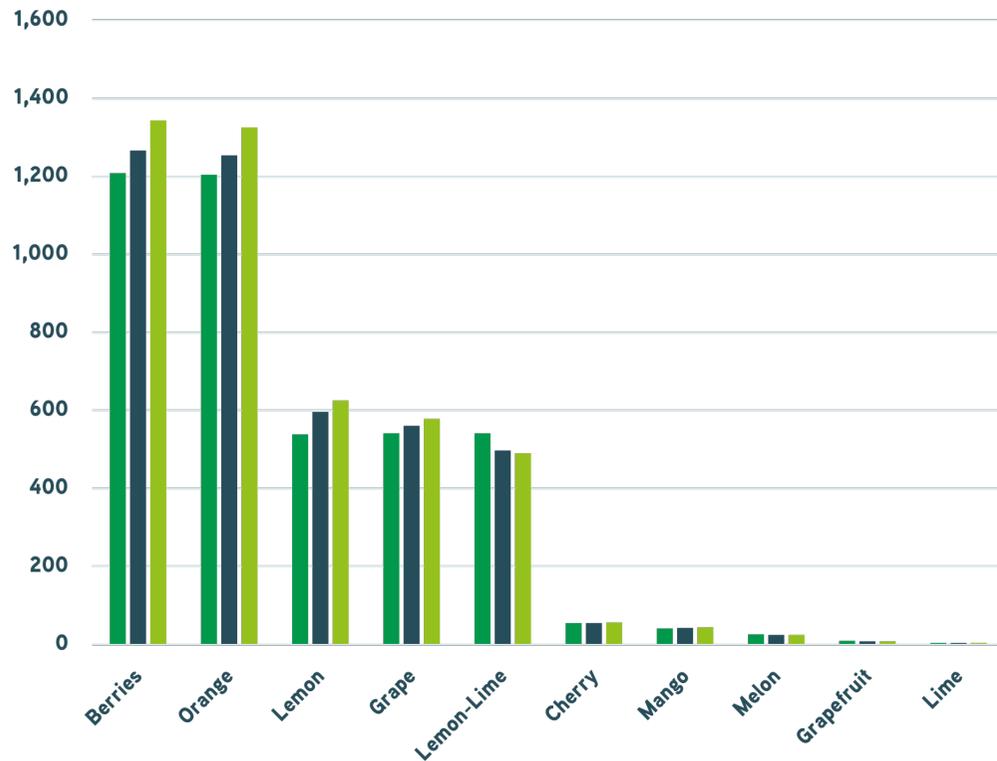
\*Excludes 'Original Energy' flavour

# TOP 10 FLAVOURS - NORTH AMERICA: SPORTS & ENERGY

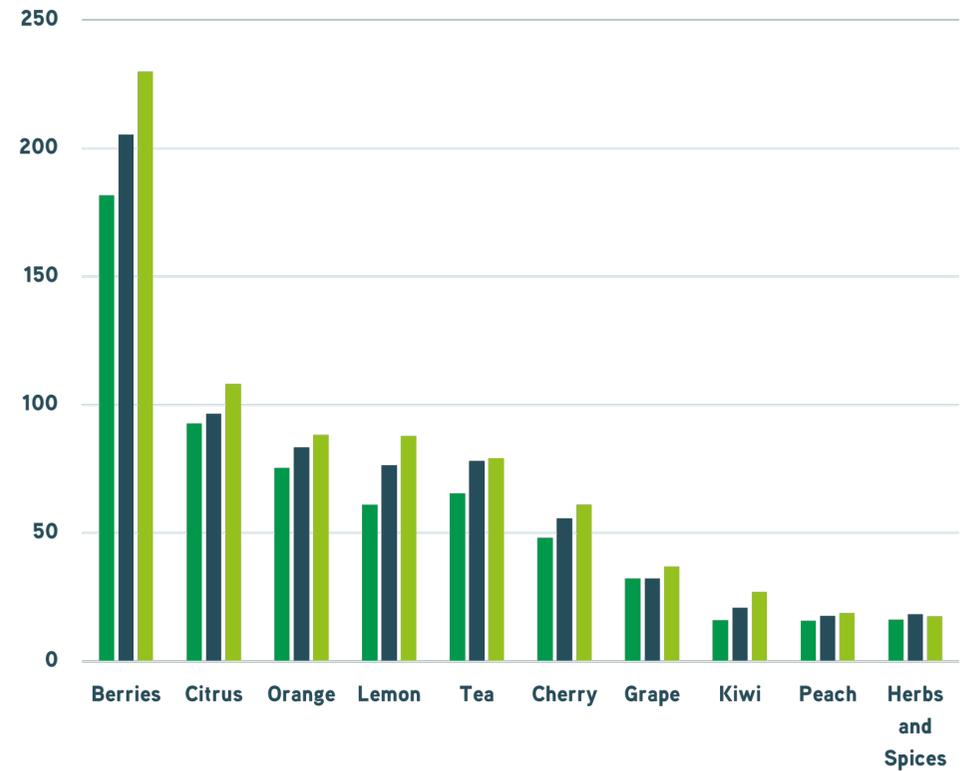
Volume (Million Litres) 2019 - 2021



### Sports Drinks



### \*Energy Drinks



■ 2019 
 ■ 2020 
 ■ 2021

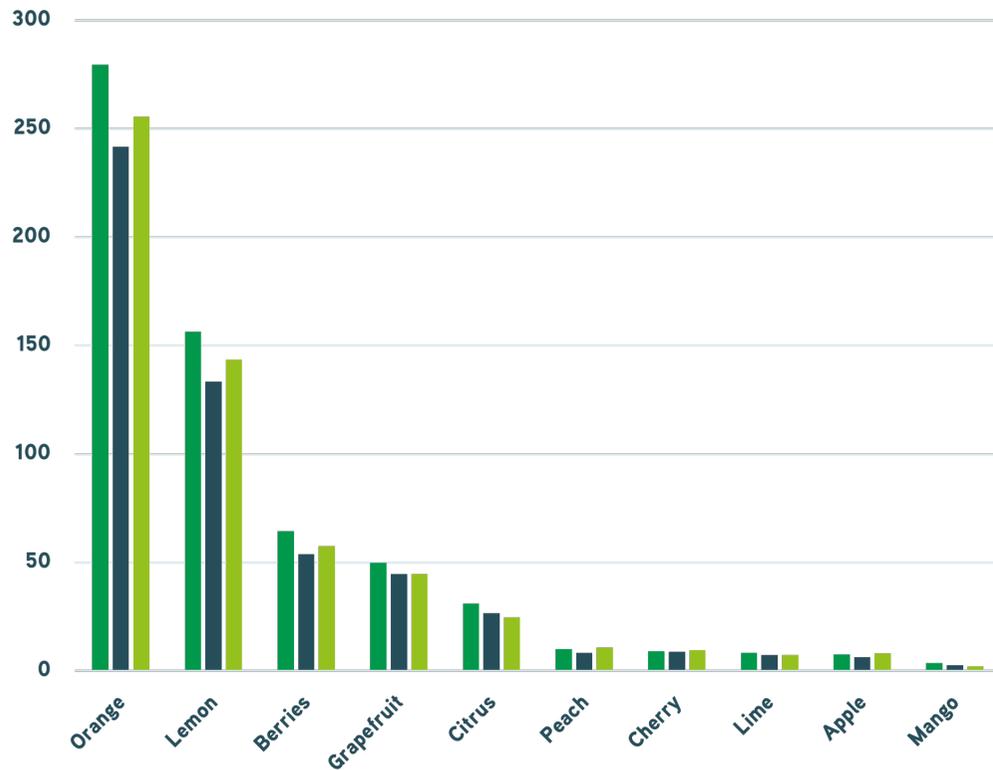
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# TOP 10 FLAVOURS - EUROPE: SPORTS & ENERGY

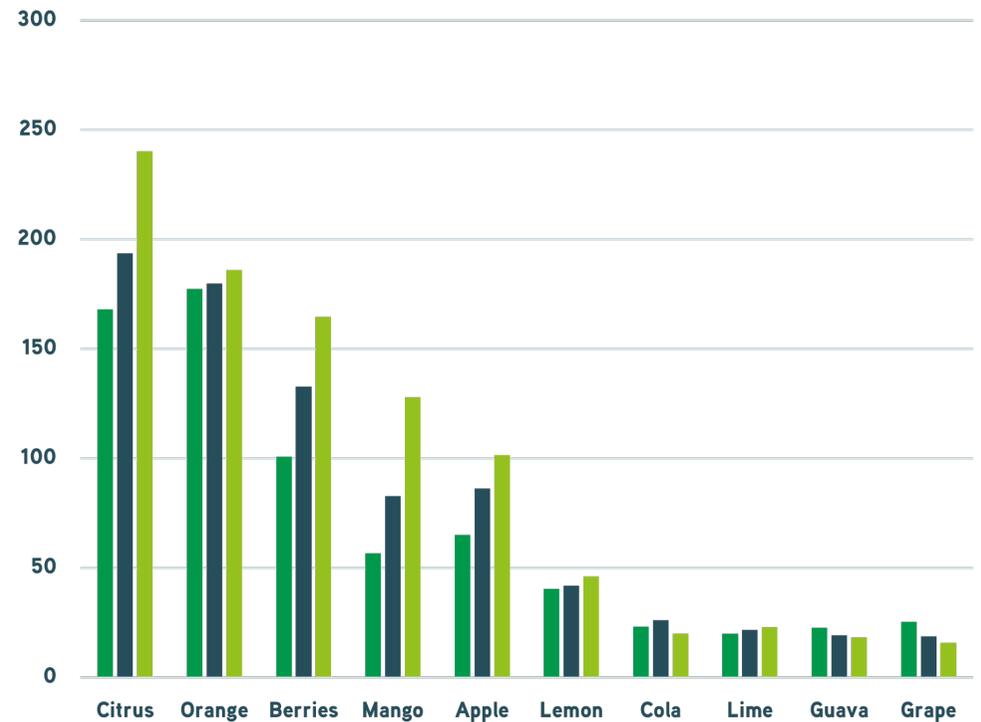
Volume (Million Litres) 2019 - 2021



### Sports Drinks



### \*Energy Drinks



■ 2019  
 ■ 2020  
 ■ 2021

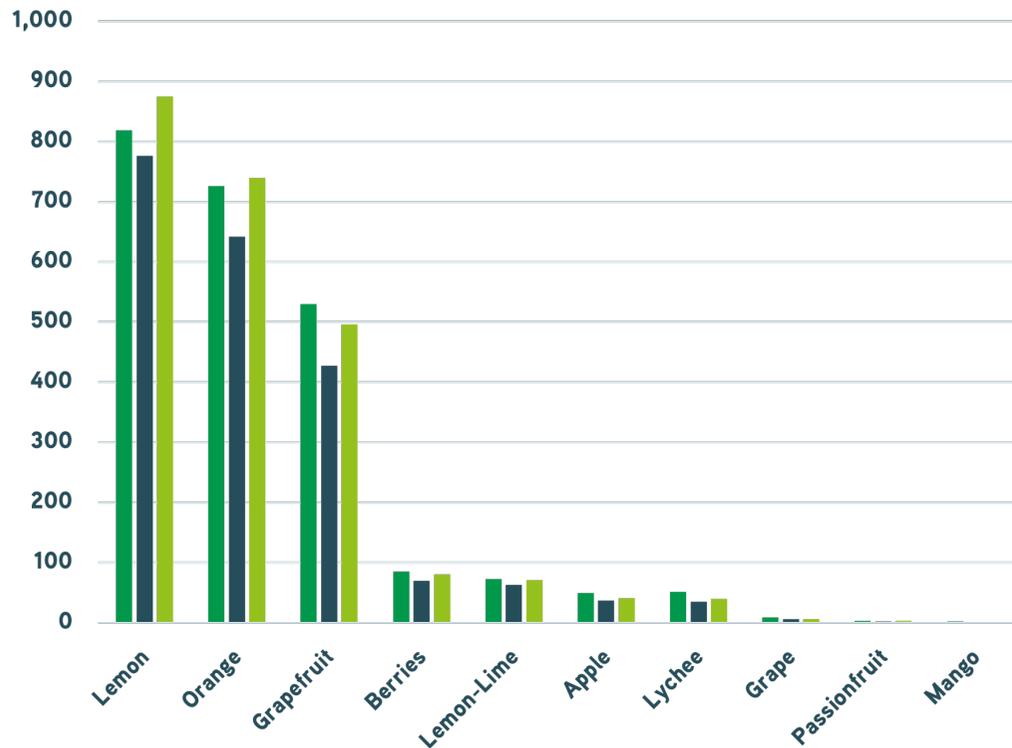
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# TOP 10 FLAVOURS - APAC: SPORTS & ENERGY

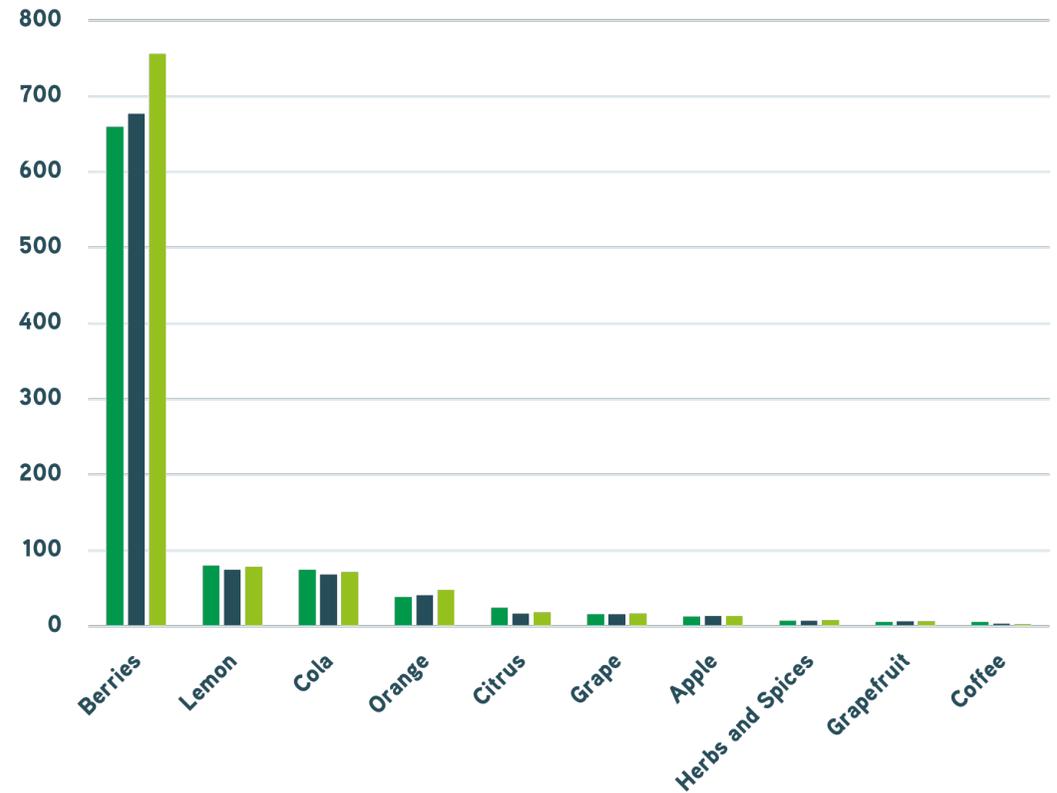
Volume (Million Litres) 2019 - 2021



### Sports Drinks



### \*Energy Drinks



■ 2019  
 ■ 2020  
 ■ 2021

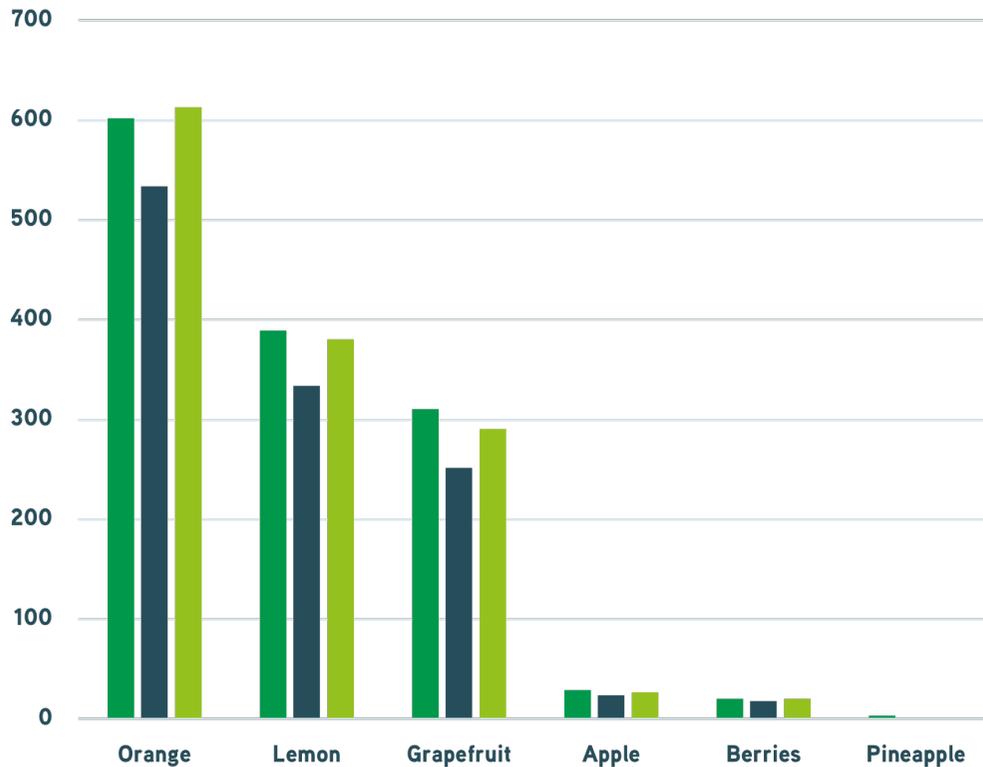
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# TOP FLAVOURS - CHINA: SPORTS & ENERGY

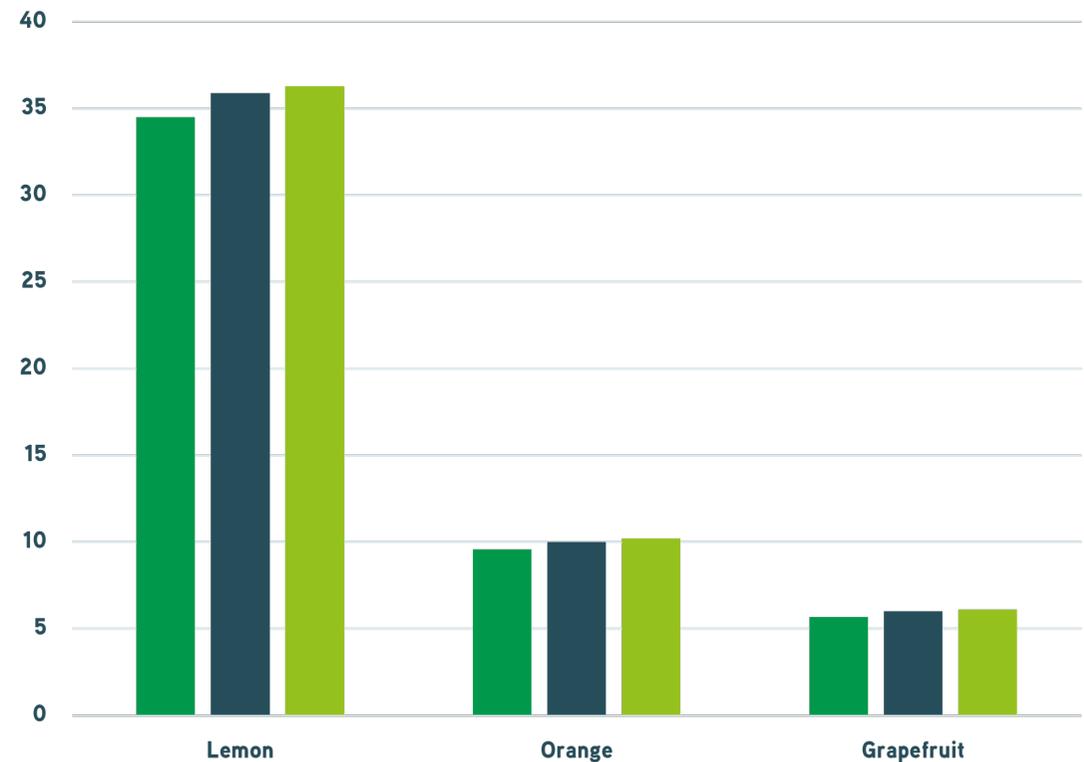
Volume (Million Litres) 2019 - 2021



### Sports Drinks



### \*Energy Drinks



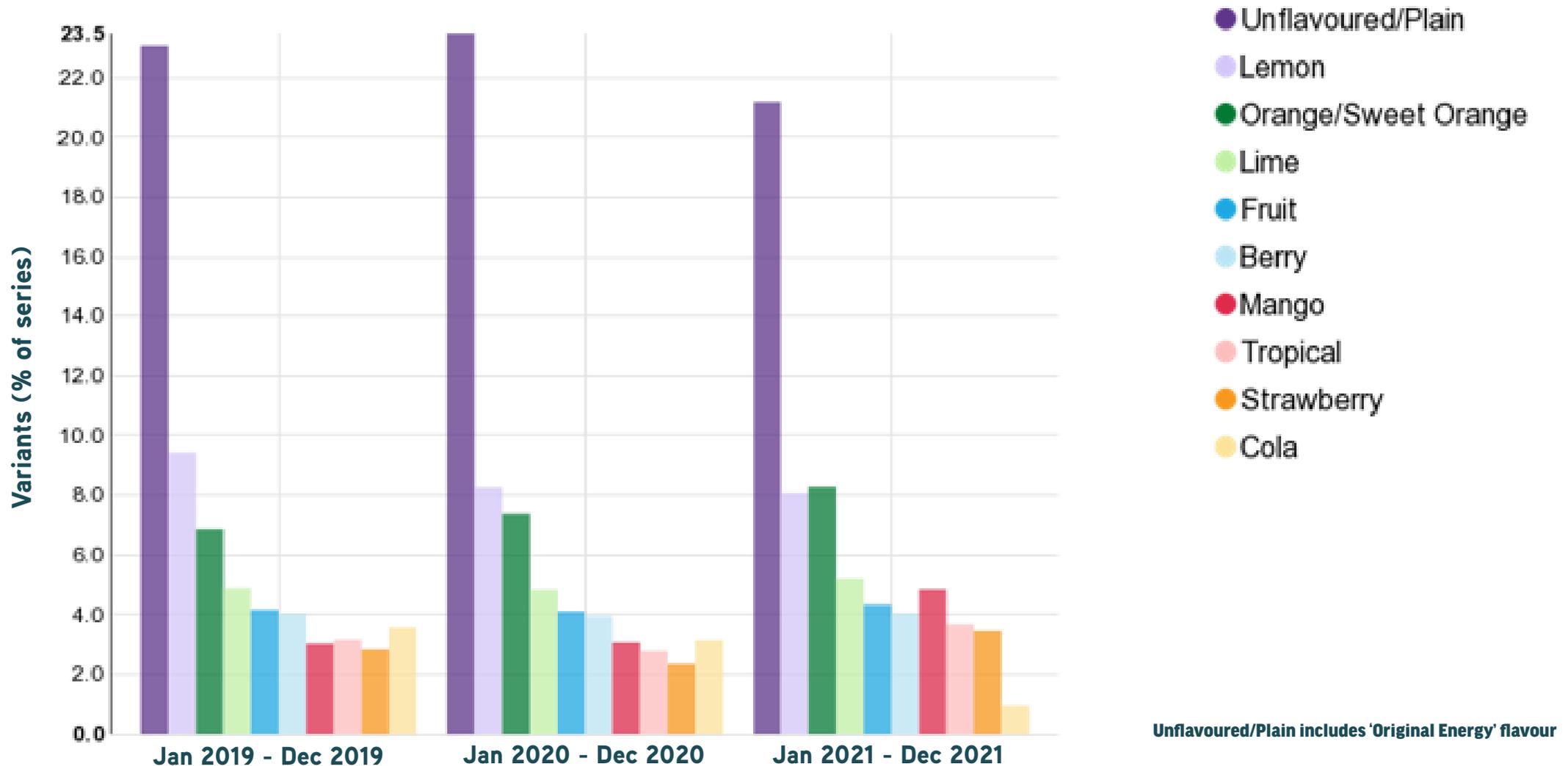
■ 2019  
 ■ 2020  
 ■ 2021

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# TOP 10 FLAVOURS BY % GLOBALLY: SPORTS & ENERGY

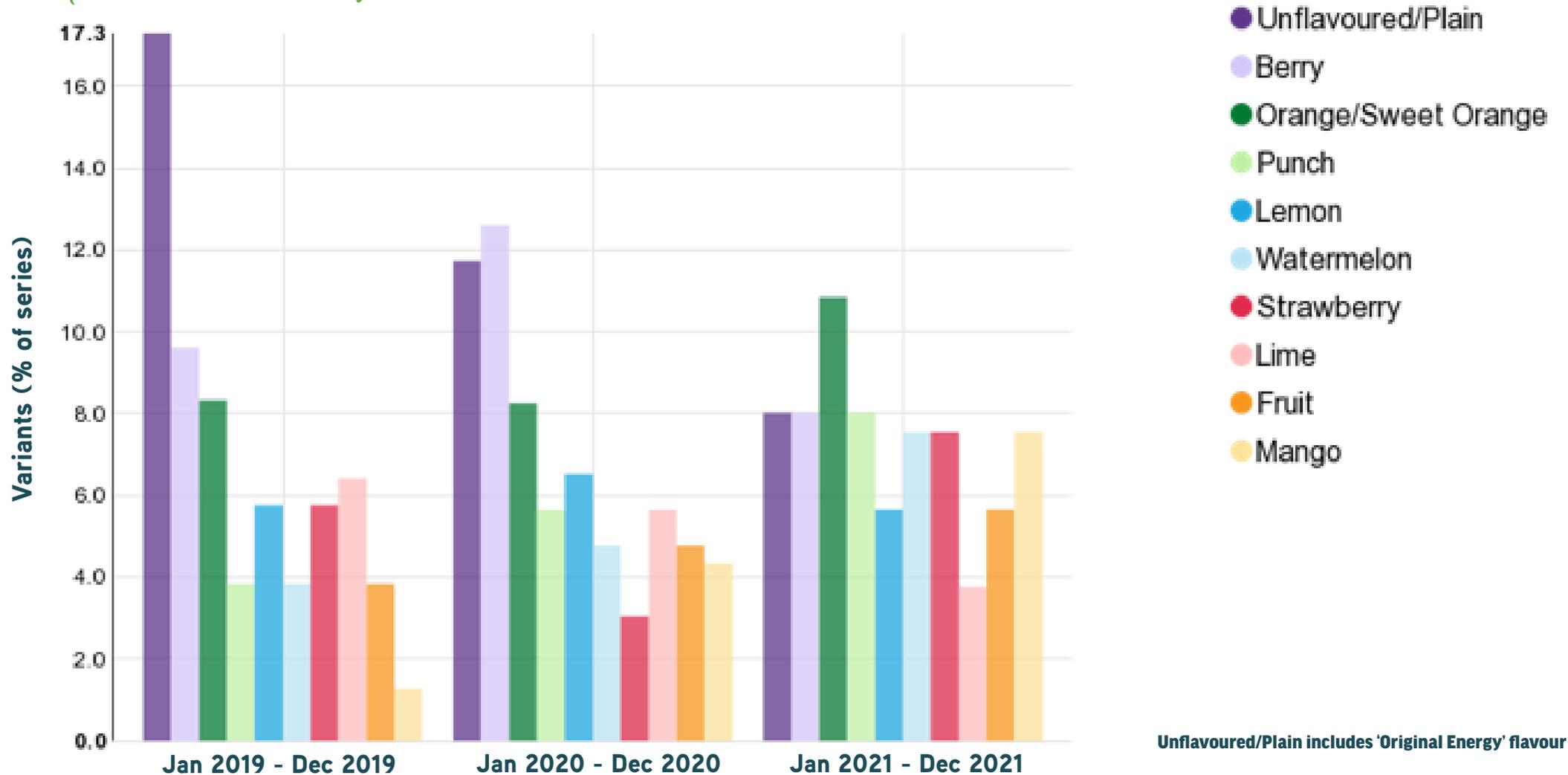


*New Product Launches 2019 - 2021*



# TOP 10 FLAVOURS BY % - NORTH AMERICA: SPORTS & ENERGY

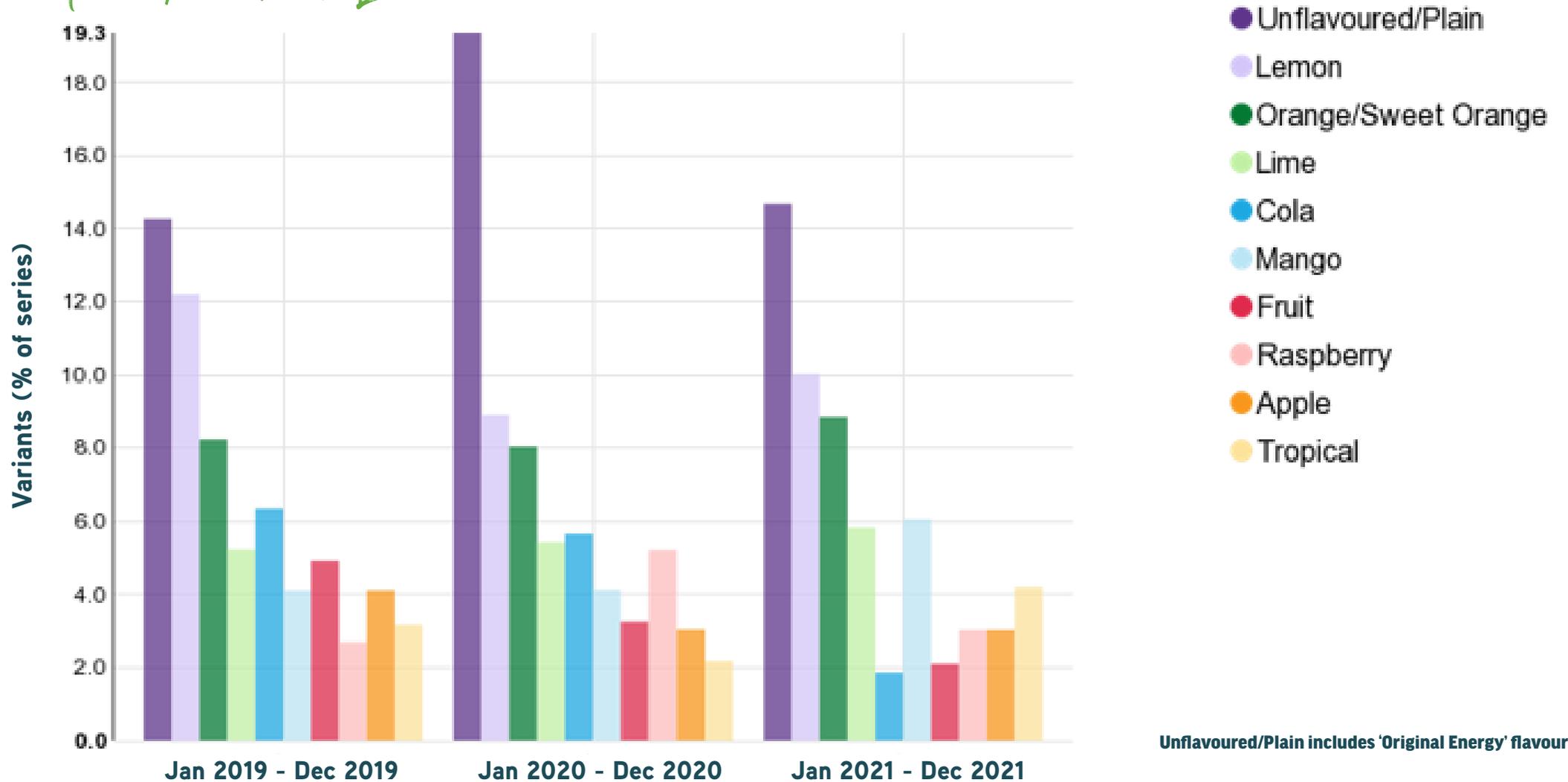
*New Product Launches 2019 - 2021*



Unflavoured/Plain includes 'Original Energy' flavour

# TOP 10 FLAVOURS BY % - EUROPE: SPORTS & ENERGY

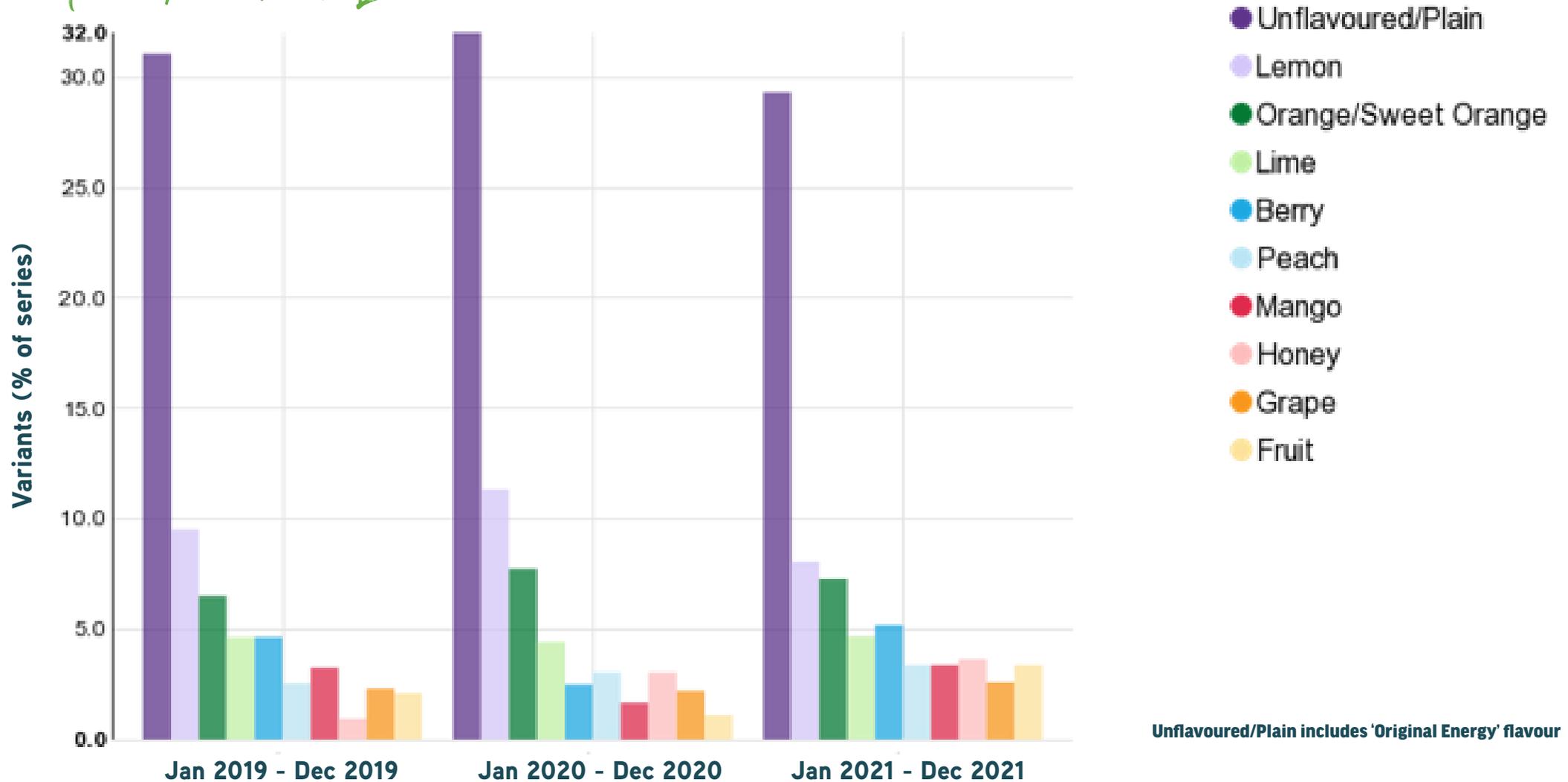
*New Product Launches 2019 - 2021*



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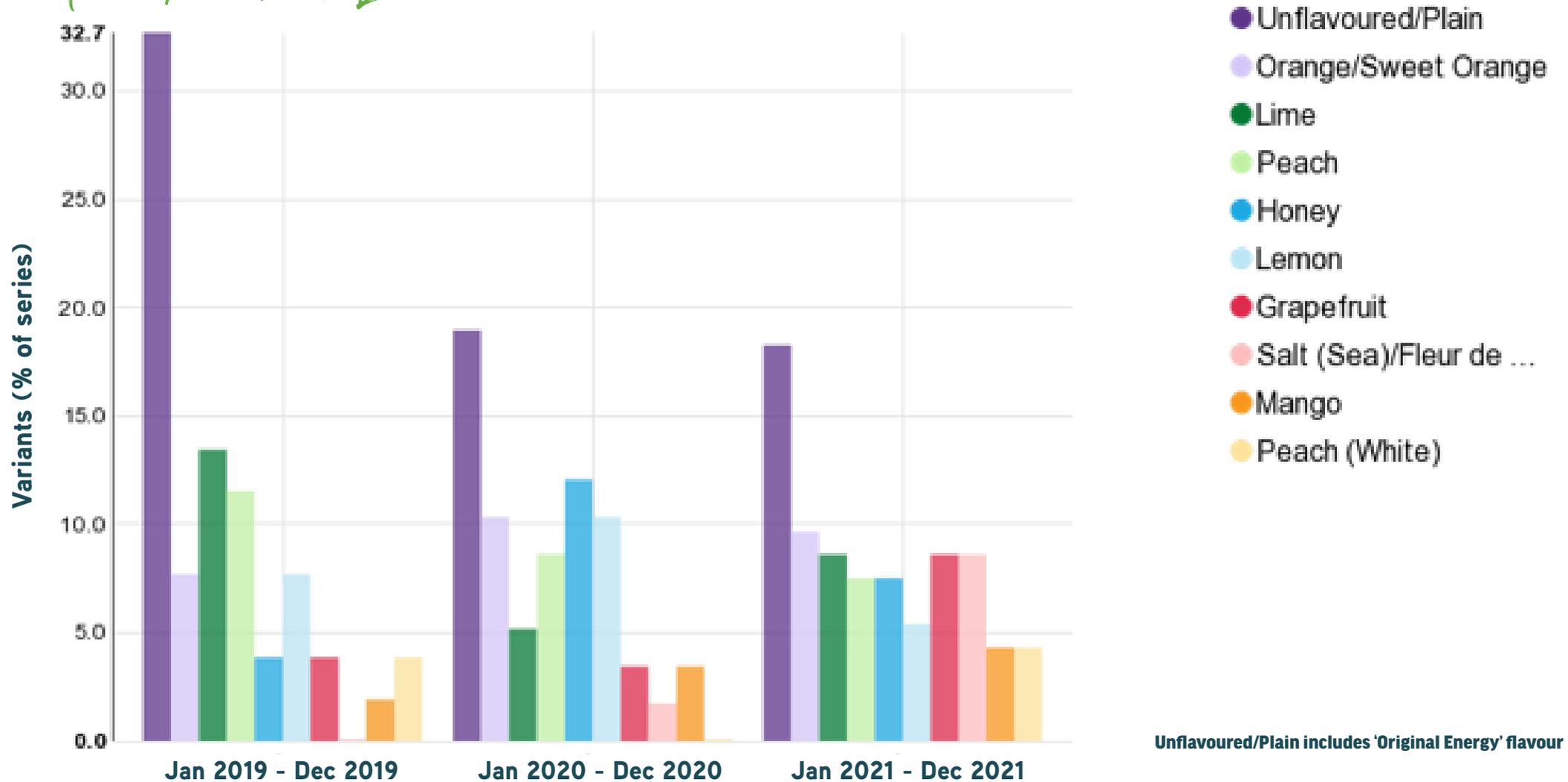
*New Product Launches 2019 - 2021*



Unflavoured/Plain includes 'Original Energy' flavour

# TOP 10 FLAVOURS BY % - CHINA: SPORTS & ENERGY

*New Product Launches 2019 - 2021*



Unflavoured/Plain includes 'Original Energy' flavour

# OUR GROWING TREATTCLEAR™ CITRUS RANGE



**THE CLEAR  
CHOICE IN**  
*Clean Label*

## REFRESHINGLY AUTHENTIC CITRUS PROFILES

Increasingly health-conscious consumers want great tasting beverages which meet their wellbeing needs and deliver on that fresh, authentic citrus experience.

Our portfolio of natural extracts is growing with the introduction of refreshing new TreattClear™ citrus extracts.

- Citrus continues to be a top trending ingredient globally, driven by increasingly health-conscious consumers
- TreattClear™ citrus range delivers impactful and authentic profiles that are true to the fruit, From The Named Fruit (FNFTF), with an effective cost in use
- TreattClear™ citrus products are water soluble and clean label, performing in a variety of applications; still, sparkling, alcoholic and non-alcoholic
- New, thriving flavours such as tangerine, Sicilian blood orange, and Mexican key lime as well as firm favourites like orange, lemon and grapefruit
- The impact and performance of these citrus extracts is best tasted for yourself.

[Book your demo](#) and sample the refreshing taste of TreattClear™ or [contact us](#) about an onsite working session to develop a custom blend.

[www.treatt.com/treattclearcitrus](http://www.treatt.com/treattclearcitrus)

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