MARKET INNOVATION OVERVIEW

CATEGORY: Coffee & Tea | **COUNTRY:** Germany

Este documento foi elaborado no âmbito do projeto PortugalFoods Qualifica, com o objetivo de criar informação de alto valor acrescentado para as PME e restantes entidades do setor agroalimentar nacional, para que estas se possam posicionar estrategicamente no contexto do mercado global.

A informação contida neste documento provém do Observatório da PortugalFoods que, com recurso à plataforma Mintel, permite contribuir para a qualificação e sensibilização do setor agroalimentar, tanto ao nível do conhecimento sobre novos produtos e técnicas de produção, como ao nível do acompanhamento da evolução tecnológica e da evolução das preferências do consumidor.

A Mintel cataloga mais de 38 000 novos lançamentos de produto por mês, provenientes dos 86 mercados que monitoriza, analisando e categorizando todos os seus atributos, tais como os ingredientes, posicionamento e comunicação ao consumidor.

O Observatório da PortugalFoods constitui-se assim como uma ferramenta de grande importância para alicerçar o conhecimento das empresas do Setor Agroalimentar.

A REGIONAL INTRODUCTION:
COFFEE & TEA PRODUCTS IN EUROPE, MIDDLE EAST AND AFRICA

COFFEE

The next generation of RTD coffees: RTD coffee sector is thriving and is primarily driven by younger consumers. Recent innovation in the category illustrates a new direction, focusing more on transparency, quality ingredients and healthier formulations.

The story of coffee beans: Communicating the story of single-origin coffee beans to consumers can elevate the heritage and provenance qualities of coffee, and can also signpost a superior and more nuanced flavour quality.

Make coffee pods more attractive: There are particular opportunities for those with ethical, functional and natural claims, and those that are striving to improve the format's environmental footprint.

TEA

Flavoured teas offer sugar-free indulgence: Indulgent flavoured teas have the potential to fill a gap for those consumers who are looking to move away from sugary beverages.

Cater to vegans/flexitarians: Tea brands can explore various avenues to cater to the growing number of vegan/flexitarian consumers. Tailoring tea blends to suit specific dairy-free milk alternatives is a popular strategy. Opportunity exists to extend the dairy-free concept RTD (iced) tea segment.

COFFEE & TEA PRODUCTS IN GERMANY

Market Overview

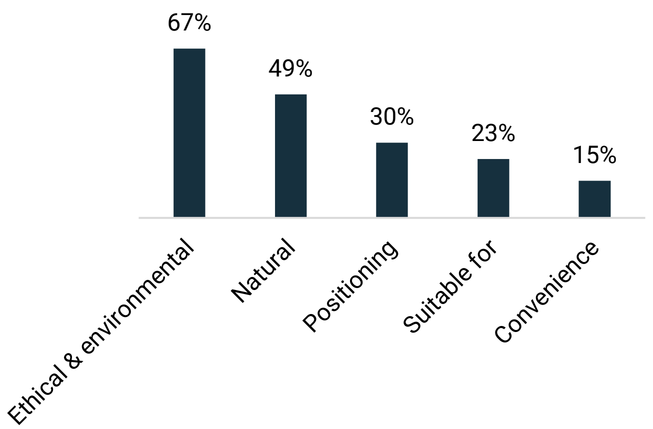
The German coffee & tea sector is expected to grow from €8.0 billion in 2018 to €9.0 billion by 2023, at a CAGR of 2.4%. In volume terms, the sector is expected to increase from 504.1 million kg in 2018 to 507.4 million kg by 2023, registering a CAGR of 0.1%.

Per capita consumption of coffee & tea in Germany stood at 6.04kg in 2018 and is expected to increase to 6.07kg by 2023. Per capita expenditure in Germany stood at €96.0 in 2018 and is expected to grow and reach €105.3 by 2023. (GlobalData, 2020)

New Product Development Analysis

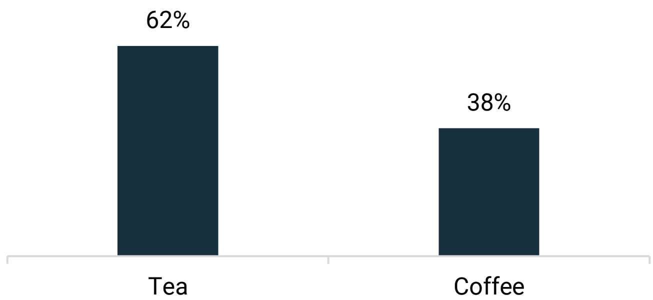
26% of drink products launched in Germany in 2019 were Coffee & Tea products.

Top 5 Claim Categories in Coffee & Tea product launches, 2019



In the coffee & tea sector, two thirds of the new product launches featured a ‘Ethical & environmental’ claim, like the ‘Sustainable’ one. Almost half of the products featured the ‘Organic’ claim, from the ‘Natural’ category. From the ‘Positioning’ category, the ‘Social Media’ claim was the most used.

Sub-Categories of Coffee & Tea product launches, 2019



In Germany, it was the ‘Tea’ sub-category that saw the most new product launches in the retail market, with ‘Coffee’ accounting for a 38% share.

This product is described as a fine black tea, and retails in a 32g pack of 16 x 2g units, featuring the UTZ Certified logo.

This organic product is suitable for vegans, and is retailed in a 40g pack made from more than 90% wood fibre.

This product retails in a 1100g pack featuring a Facebook address.

THE GERMAN CONSUMER

57%

Agree – Coffee **is "nature's energy drink"** (2018)

37%

Of German coffee consumers say they would pay more for coffee **that was ethical, such as Fairtrade or sustainable** (2018)

50%

Agree – **Hot coffee tastes better** than chilled/iced coffee (2018)

Products interested in trying (2018)

35% Tea farmed in a way that protects the local environment

Tea packed in plastic-free bags **23%**

(GlobalData, 2020)

A GLOBAL LOOK INTO THE FUTURE

Move into wellness: Looking to stay relevant to younger consumers, traditional tea brands move into wellness, while also looking to profit from vegan and anti-sugar movements. Flavoursome botanicals take a key role in RTD tea innovation as brands push forward with healthier formulations. Cannabidiol emerges on the scene.

In the same way, for a growing minority of consumers, coffee's taste and stimulation are no longer enough. They demand even more, hence the rise of products with further health and beauty functional claims.

The experience factor: Tea brands are looking to intensify consumer connections by delivering memorable experiences, which include a growing focus on sustainable practices. Whole bean coffee is a hassle to make at home – which has traditionally restricted its retail growth – but coffee shop culture is encouraging more consumers to freshly grind their coffee at home.

TEA

Plastic-free becomes a must: In packaged tea, the polypropylene used to seal teabags has become a concern, while also offering opportunities for brands to take eco-friendly innovation to the next level.

COFFEE

Texture emerges as the new frontier: While creamy texture is important to communicate tasty indulgence, the greatest opportunity for coffee brands lies in texture that delivers the holy trinity of health, satiety, and taste. This will lead to more launches – primarily in the RTD format.

Para mais informações acerca do Observatório da PortugalFoods, por favor contactar

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