

Europe Sugar Free Energy Drinks - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The Europe Sugar Free Energy Drinks Market size is estimated at 4.92 billion USD in 2025, and is expected to reach 7.15 billion USD by 2030, growing at a CAGR of 7.77% during the forecast period (2025-2030).

The adoption of diverse marketing strategies by European retailers has bolstered the sales of the sugar-free and low-calorie energy drink market

- Off-trade retailing segment is considered to be the leading distribution segment for the sugar-free or low-calorie energy drink market in Europe. Also, the sales value of sugar-free or low-calorie energy drinks witnessed a growth of 31.07% in 2023 compared to 2018. The growth is anticipated with the rising availability of sugar-free or low-calorie energy drinks from various brands. In addition, the off-trade retailers collaborate with famous fitness enthusiasts to increase their consumer base.
- In the off-trade retailing segment, online retailers are considered to be the fastest-growing industry in the respective region. Some of the most preferred e-commerce websites in Europe are rewe.de, flaschenpost.de, amazon.de, bofrost.de, and hawesko.de. To increase the consumer base, these retailers offer a wide range of services such as they offer subscription-based models for regular delivery of sugar-free or low-calorie energy drinks, providing convenience to the consumers. The supermarket and hypermarket chains across Europe are considered to be the largest retailers within the off-trade segment. These retailers are exhibiting their business by offering a wide selection of sugar-free or low-calorie energy drink beverages. In 2030, this market is expected to grow by 40.39% from 2023.
- The on-trade distribution channels maintained the highest CAGR of 9.45% by value between 2019 and 2023. The majority of on-trade retailers in Europe, such as pubs, bars, and QSRs, are heavily reliant on sugar-free or low-calorie energy drinks and derivatives. These retailers often introduce limited-time offers on specific energy drinks or create seasonal promotions that can

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create a sense of urgency and encourage customers to try new beverages.

Rise in obesity and government initiatives to reduce sugar intake boosting the growth of the market

- From 2021 to 2023, the value of sugar-free or low-calorie drink sales in Europe rose by 14.02%. Driven by growing concerns over sugar consumption, European consumers are increasingly gravitating toward sugar-free options, even in energy drinks. Major brands like Powerade, Red Bull, Monster, and Rockstar have all introduced sugar and calorie-free variants. Notably, 64% of Europeans actively seek low-sugar options when purchasing carbonated beverages. Reflecting this trend, Europe's soft drinks industry has been actively reducing sugar content, aiming to offer healthier choices and encourage moderation. The Union of European Soft Drinks Associations has committed to a further 10% reduction in added sugars in soft drinks from 2019 to 2025 across the EU-27, bolstering the production of sugar-free and low-calorie energy drinks.
- In Germany, over half the adults (53.5%) are either overweight or obese, with men being more affected. The prevalence of obesity stands at 19% for both genders. As of 2022, over 8.5 million Germans were living with diabetes. Notably, the rates of overweight and obesity rise with age for both men and women. Additionally, German consumers exhibit a heightened health consciousness, leading to a preference for sugar-free energy drinks.
- Turkey is poised for significant growth, projected to record a CAGR of 9.79% in value for the period from 2024 to 2030. In line with this, the Turkish Health Ministry has introduced the Sugar Reduction Guide, aiming to gradually decrease sugar content in non-alcoholic beverages, including energy drinks, by at least 10% by 2025. In 2022, over 56% of the Turkish population was classified as overweight or obese, highlighting the country's substantial potential for energy drink consumption in the coming years.

Europe Sugar Free Energy Drinks Market Trends

Growing trend of health-conscious consumers looking for low-calorie beverages fuels the segment sales

- Energy drinks are particularly popular among young adults, including college students and professionals, who consume them for increased alertness and stamina. In 2022, around 25% of UK children consumed energy drinks citing taste (60%) and energy (31%) as the main reasons for consumption.
- As consumers are demanding more sugar-free energy drinks manufacturers of sugar-free energy drinks in Europe are responding on various areas such as innovative product offerings, technologies, and marketing expenditure including advertising and endorsements.
- The disposable income of consumers is a crucial economic parameter. Higher disposable incomes generally make consumers more willing to spend on discretionary items like energy drinks more so for sugar-free energy drinks.
- Demand for sugar-free energy drinks has increased as they stabilize the blood sugar levels due to the energy-boosting ingredients like B Vitamins, aminoacids and herbal extracts which have been widely accepted for their health benefits.

Europe Sugar Free Energy Drinks Industry Overview

The Europe Sugar Free Energy Drinks Market is fragmented, with the top five companies occupying 23.13%. The major players in this market are Monster Beverage Corporation, PepsiCo, Inc., Red Bull GmbH, Suntory Holdings Limited and The Coca-Cola Company (sorted alphabetically).

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- The market estimate (ME) sheet in Excel format
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