Pump or Power? SUPER POP's Next Flavor of Growth



"We have been watching the trend towards functional drinks for a very long time, and at some point we felt that Germany was ready for the new generation of fun drinks," remarked Fabian Huber, co-founder of SUPER POP.

This case was written by Christopher Koch, Jan Bruchertseifer, Tim Kirner and Luan Junuzi from the University of Münster Case Club e.V. and SUPER POP. The case was prepared to provide material for the University of Münster Case Challenge organized by the University of Münster Case Club e.V. and may not be copied or distributed in any way without permission of the authors. The authors do not intend to illustrate either effective or ineffective handling of a managerial situation. Certain names and other identifying information may have been disguised to protect confidentiality.
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Introduction

SUPER POP is a functional lemonade brand from Stuttgart that originated within the UniBev ecosystem, the company behind creator-led drinks such as the iced tea BraTee with rapper Capital Bra. Inspired by US prebiotic sodas such as poppi, which PepsiCo agreed to acquire for USD 1.95 Bn, the brand brought fitness creator Pamela Reif on board as an investor and strategic partner in June 2025 and launched a month later at EUR 1.49 per can, selling three million cans in its first nine weeks. Since then, SUPER POP has made its way onto the shelves of grocery and drugstore retailers across Germany, Austria and Switzerland, carried by a fruity taste, an eye-catching can and a brand built largely through creators, with most cans sold in brick-and-mortar stores. Every can is sugar-free and contains 6 grams of fiber, a teaspoon of apple cider vinegar and postbiotic cultures, yet SUPER POP sees itself as a lifestyle brand rather than a health product: taste, design and enjoyment come first, and no health claims are made. The sugar-free lemonade with a functional plus has found its audience.

As management looked ahead, two ideas kept returning to the discussion: a drink with protein and a drink with energy. Both follow trends that are reshaping the beverage shelf, and both could open up new occasions and new consumers for the brand. But they point in very different directions, towards different shelves, different competitors and a different promise to the consumer. With the new product set to reach the shelf next year and resources for only one launch, SUPER POP cannot pursue both.

The harder question is therefore not only which of the two fits SUPER POP, but how a brand that relies on creators and retail relationships can bring something new to market without losing what made it successful in the first place.

Product, Economics and Lifecycle

SUPER POP is a vegan, stevia-sweetened lemonade in a can, available in five core flavors. The brand has also introduced limited editions and continues to develop new limited-edition products. It addresses a familiar trade-off: classic soft drinks are full of sugar, diet sodas feel artificial and functional drinks often seem medicinal. SUPER POP therefore competes on the regular soft-drink shelf rather than in the health aisle, with the functional ingredients as an easy-to-understand plus.

Economically, SUPER POP follows a classic B2B2C model: it sells cans to retailers at a wholesale price, and retailers sell them on to consumers at a premium over classic lemonades. The margin per can is thin: of the EUR 1.49 retail price, only about EUR 0.68 reaches the brand, and after production, marketing and overhead just EUR 0.11, or 7%, remains as contribution margin (Appendix 1). Because revenue comes from one-off purchases, profitable growth depends on sell-through per store and on turning first-time triers into repeat buyers: strong sell-through secures listings and shelf space, while higher volumes and more efficient marketing are needed to cover fixed costs. Operationally, the model rests on creator-led brand building, key account management and a lean supply chain that draws on UniBev group structures and contract bottlers.

Beverages move through the usual lifecycle of introduction, growth, maturity and decline, but on the drinks shelf this cycle runs fast: retailers review their ranges regularly, and products that miss their sell-through targets soon lose their listing. For influencer-driven drinks, the curve is even steeper. Creators can generate awareness and trial within weeks, as SUPER POP's own launch showed, but demand fades just as quickly once the audience moves on to the next trend. The real task is to bridge the gap between hype and habit. Retailer-exclusive limited editions such as Shirley Temple × Kaufland and range extensions help to restart the curve, which is why the planned Protein or Energy launch is also the next step in extending SUPER POP's lifecycle.

Distribution

SUPER POP is sold almost entirely through brick-and-mortar retail: in Germany at Rewe, Edeka, Kaufland, dm and Müller, in Austria at Billa, Billa Plus, Eurospar, Interspar, Maximarkt and dm, and in Switzerland at Coop. Discounters are deliberately avoided to protect the premium price. As retailers decide on listings, shelf space and promotions, they act as gatekeepers, and a listing is only secure as long as sell-through stays strong.

Supermarkets and hypermarkets generate the bulk of sales, while drugstores stand out at around 17%, far above the category average of 2.6%, because the core target group shops there regularly for health and beauty products (Appendix 2).

Target Audience

SUPER POP's core target group consists of women aged 25–35 in urban or near-urban areas with a modern, active and enjoyment-oriented lifestyle, who are willing to pay a little more for visible added value. They follow nutrition and food trends, Pilates, yoga, running, beauty and self-care, like new, attractive brands and discover them mainly via Instagram, TikTok, creators, events and friends. They buy SUPER POP for its fruity taste, the sugar-free recipe and 6 grams of fiber, its image as a trend product and recommendations from creators or friends.

Extended target groups mirror the seven persona clusters used in SUPER POP's influencer marketing (Appendix 3): Gen Z and students (reach and virality), fitness and wellness fans (functional credibility), trend- and shopping-affine consumers (aesthetics and lifestyle, plus sell-through via where-to-buy content), "balanced women" aged 35–44, addressed both as nutrition-conscious shoppers and as food lovers (enjoyment and taste), and mothers and families (trust and everyday relevance). Since consumers both drink the product and pay for it at the shelf, SUPER POP wins them through brand pull: creator touchpoints build familiarity, where-to-buy signals guide them to the store and the recognisable can triggers the purchase.

Influencer Strategy

Creators are SUPER POP’s most important channel partners: they act as credible translators of the brand to consumers and are the main way the brand is discovered. SUPER POP follows a two-track strategy.

A year-round evergreen campaign builds continuous familiarity with the brand, while limited-edition campaigns exclusive to one retailer, such as Shirley Temple × Kaufland, create a reason to buy now and send consumers to a specific store. Creators are selected

by persona cluster, from entertainers who bring reach among Gen Z to fitness voices who lend the functional side credibility and conversion drivers who push where-to-buy content, so that each one covers a defined audience and role in the mix (Appendix 3).

The aim of this mix is to turn social attention into concrete purchases at the shelf. Repeated creator touchpoints build familiarity, clear signals about where the product is sold guide consumers to the store, and the recognisable can design triggers the purchase. As marketing accounts for around EUR 0.18 per can (Appendix 1), creator fees and content production have to be managed carefully, using CPM (cost per thousand contacts) and engagement rate as the key metrics. In all content, communication stays focused on taste and lifestyle and must never make health or efficacy claims.

The Energy Drink Market

Energy drinks are one of the largest categories on the German beverage shelf. By retail sales, they rank third among non-alcoholic beverages, after water and cola and ahead of lemonades and fruit juices. Excluding petrol stations, German retail sales reached about EUR 2.24 Bn in 2025 (Appendix 6). Per-capita consumption rose from 5.7 litres in 2018 to 8.1 litres in 2023, but remains below Austria (12.5 litres) and the UK (11.0 litres). According to figures published by ÖKO-TEST in April 2025, around 10.6 million Germans report having drunk an energy drink in the previous two weeks, and about 1.9 million drink one every day. After a strong boom, with retail sales growing by 16.0% in 2023 and 9.3% in 2024, growth slowed to 1.2% in 2025. Volume still rose by 2.5%, but average prices fell as brands competed through promotions.

Four developments are shaping demand for energy drinks:

- **Sugar-free goes mainstream.** Red Bull's relaunched Zero variant grew its volume by 164% in 2025. A German sugar levy, adopted by the federal cabinet in October 2026, would tax sugared drinks from July 2027 but exempt drinks sweetened only with sweeteners.
- **Flavour over function.** Flavoured variants accounted for 46% of German retail sales in 2024, up from 41% a year earlier, supported by seasonal and limited editions.
- **Creators as brand builders.** Creator-led brands such as Gönrgy, co-founded by streamer MontanaBlack in 2023, have built their audience online before moving into retail.
- **Broader occasions.** Energy drinks are consumed at work, during exams, for sport, gaming and nights out. Branding, however, remains largely male-coded, and only 28% of Germans say energy drinks fit their lifestyle.

Purchases are largely made on impulse: 59% of buyers decide only once they are in the store. At the same time, regulation is tightening. In October 2026, the federal cabinet adopted a sugar levy that is set to apply from July 2027, subject to approval by the Bundestag. Drinks with at least 5 g of sugar per 100 ml would be taxed at EUR 0.26 per litre, and those with 8 g or more at EUR 0.32 per litre. Energy drinks are explicitly covered, while sugar-free variants are not. In addition, Germany already caps caffeine at 320 mg per litre, and a minimum age of 16 for buying energy drinks is being debated.

The market is highly concentrated. Red Bull and Monster together account for about three quarters of German retail sales, followed by private labels such as Edeka's Booster with around 15%. Below this duopoly, challengers such as effect and Gönrgy compete for third place among branded players, and juice and pouch-drink companies have entered with Vaboo (Valensina) in 2025 and Game On (Capri Sun) in 2026.

The Protein Drink Market

Over the past few years, protein has evolved from a niche sports nutrition topic into an established part of everyday consumption. In German retail, dairy products with a protein claim are currently growing significantly faster than comparable products without such a claim.

The following section focuses exclusively on the market for ready-to-drink (RTD) protein beverages. Protein powder is considered a substitute and trend indicator but is not included in the market size. Within the RTD market, two segments can be distinguished:

- **Creamy protein shakes**: dairy-based drinks in bottles or cartons, typically with 20–35 g of protein per serving
- **Clear protein drinks**: light, transparent and often carbonated drinks such as protein water or protein lemonade, typically with 10–20 g of protein per serving

The European market for protein-based RTD drinks was valued at approximately EUR 391 M in 2025. Creamy RTD shakes account for around 69% of revenues and remain the dominant format, while clear protein drinks represent the smaller format, which Mordor Intelligence identifies as the fastest-growing sub-segment. For this case, Germany is assumed to account for roughly 20% of the European market. This assumption reflects Germany's position as Europe's largest fitness market with 12.36 million gym members. It results in an estimated German market size of around EUR 78 M in 2025. Looking ahead, the European market is expected to grow at a CAGR of around 8% between 2026 and 2031, reaching approximately EUR 622 M by 2031. Applying the same 20% assumption, the German market would grow to around EUR 124 M (Appendix 4). Within the broader European RTD beverage market, protein and meal-replacement shakes are expected to be the fastest-growing product category, at around 7% per year until 2031. Growth is increasingly driven by consumers outside the core athlete segment.

Three developments are shaping demand for protein drinks:

- **Protein goes mainstream.** In German retail, sales of dairy products with a protein claim grew by 21.5% in the twelve months to March 2026, compared to 2.2% for products without such a claim. Consumers accepted a price premium of around 40% (EUR 1.50 vs. EUR 1.07 per pack). Women now account for around half of European consumers actively seeking out protein products.
- **Younger consumers drive adoption**. Retail sales of protein powder in German supermarkets and drugstores rose from EUR 113 M to EUR 327 M within two years. The number of buying households doubled from 2.5 to 5.1 million, and the share of buying households more than doubled among both Gen Z (9.5% to 20.8%) and Millennials (8.8% to 19.6%).

- **Fitness boom.** German gyms reached a record 12.36 million members in 2025 (+5.6%), equal to 14.8% of the population.

At the same time, several factors may slow growth. Strong demand has pushed whey protein prices to record levels, which increases production costs. Consumers in Germany, the UK and France also show growing fatigue towards heavy and overly sweet protein shakes. Clear protein drinks offer a lighter alternative but still account for a small share of the category. Established dairy companies control shelf space and benefit from strong retail relationships.

The market is led by established dairy companies whose products are positioned almost entirely around sports and training. Ehrmann is regarded as the first mover in the German high-protein segment and offers drinks with up to 35 g of protein per bottle. It has recently extended its range with creatine-enriched products. Arla was among the first companies to bring protein products into German retail.

At the same time, new formats are entering the shelf. JUUZ Protein Limo, a carbonated protein lemonade with 15 g of whey protein, is sold at dm in a 330 ml can for EUR 2.45. Clear whey powders, which consumers mix at home and which are marketed as "protein lemonade", act as substitutes. Coffee chains are also entering the space, for example through a partnership between Starbucks and Arla for a protein iced coffee.

Across Europe, around 65% of ready-to-drink beverage sales are made in supermarkets and hypermarkets, while online retail is growing faster but from a smaller base. Protein powder, in contrast, is still sold largely online. For RTD protein drinks, grocery and drugstore retailers are therefore the main sales channel.

Overall, creamy and sports-positioned products dominate. Clear, lifestyle-oriented protein drinks in brick-and-mortar retail remain a small segment (Appendix 5).

Decision Time

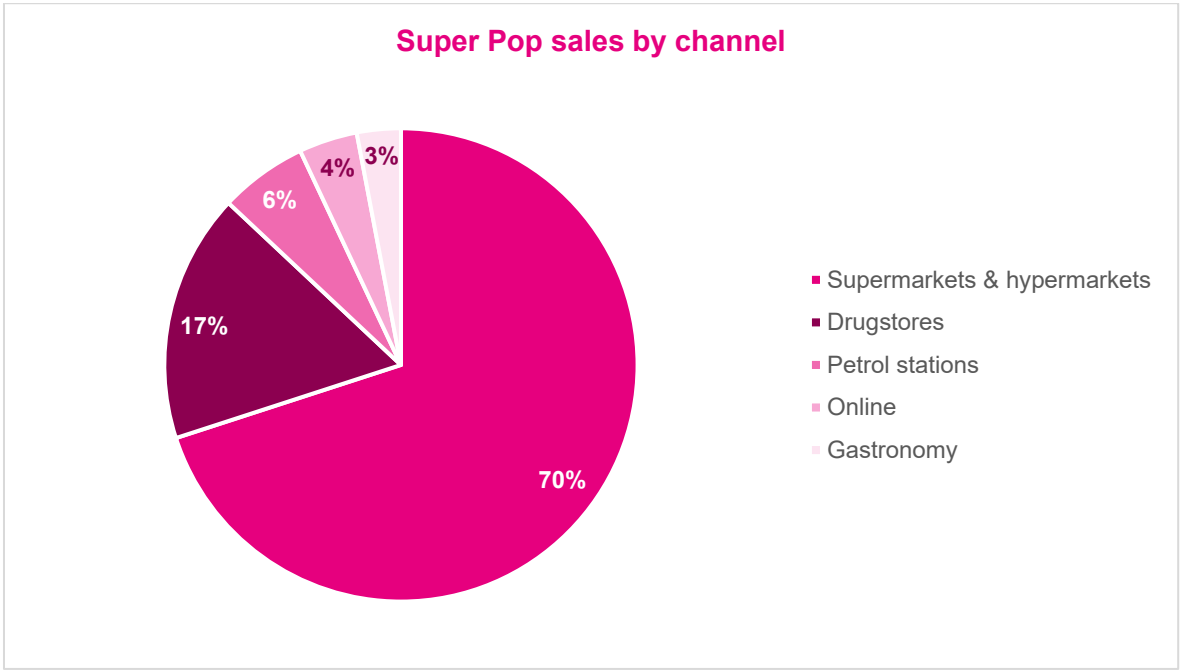
As newly appointed strategy consultants, your team has been asked by the SUPER POP team to answer exactly this question: should SUPER POP launch a protein drink or an energy drink next year, and how can the new product be brought to market without losing what made the brand successful in the first place? Your objective is to evaluate both options against relevant criteria (e.g. brand fit, market attractiveness, competitive landscape and target audience) and make a clear recommendation for one of the two launches. Building on this decision, develop a go-to-market strategy that defines the product concept, positioning and pricing. Your recommendation should quantify the expected financial impact of the launch and include an assessment of the key risks associated with the proposed path, together with measures to mitigate them.

Appendix

Appendix 1: Unit economics per can

Item	EUR / can	% UVP
UVP (SUPER POP, incl. VAT)	1.49	100%
VAT	(0.24)	(16%)
Retailer margin	(0.44)	(30%)
Distributor margin	(0.02)	(1%)
Trade spend	(0.11)	(7%)
Net revenue to brand	**0.68**	**46%**
Ingredients	(0.10)	(7%)
Can + lid	(0.11)	(7%)
Co-packing / filling	(0.07)	(5%)
Secondary packaging	(0.02)	(1%)
Logistics	(0.05)	(3%)
Waste & QA	(0.01)	(1%)
Producing cost (COGS)	**(0.36)**	**(24%)**
Gross profit	**0.32**	**21%**
Marketing	(0.18)	(12%)
Sales overhead	(0.03)	(2%)
Contribution margin	**0.11**	**7%**

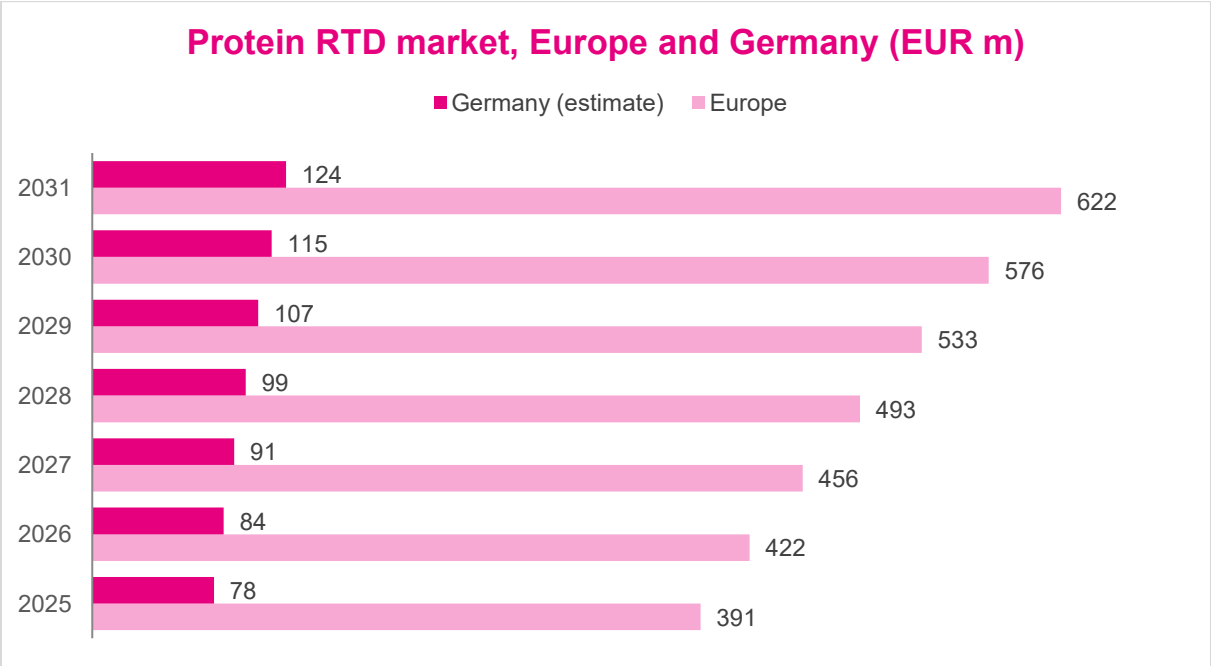
Appendix 2: SUPER POP sales by channel



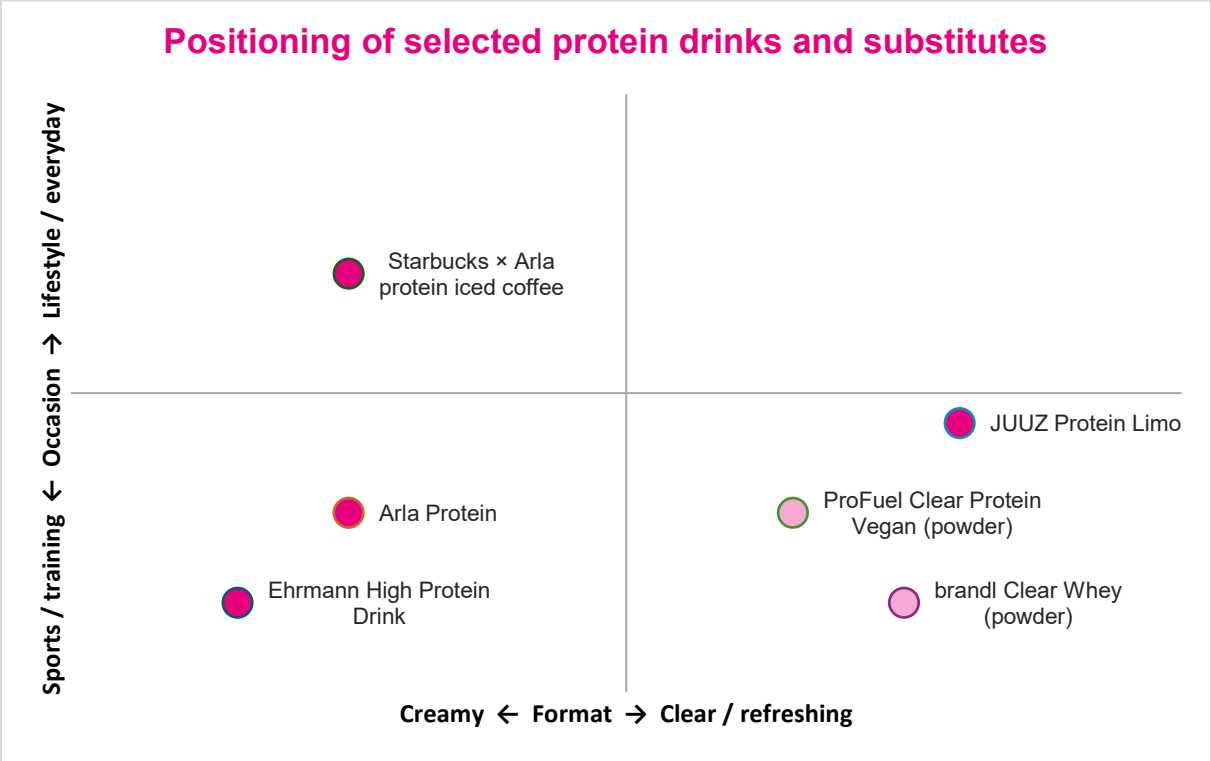
Appendix 3: Influencer persona clusters

Persona	Audience	Role in mix	Example content
Entertainer	Gen Z / students	Reach, virality	Blind taste tests, rankings
Fit Mind	Fitness & wellness	Functional credibility	Gym / Pilates routines
Clean Girl	Trend-/shopping-affine	Aesthetics, lifestyle	Self-care routines, fridge restocks
Dinkel Dörte	Balanced woman	Nutrition-conscious	Grocery hauls, sugar-free swaps
Family Voice	Mothers	Trust, everyday relevance	Family fridge, daily moments
Food Lover	Balanced woman	Enjoyment / taste	Mocktails, food pairing
Conversion Driver	Trend-/shopping-affine	Sell-through	Where-to-buy, LE x retailer drops

Appendix 4: Protein RTD market, Europe and Germany (EUR M)



Appendix 5: Positioning of selected protein drinks and substitutes



Appendix 6: Energy drink retail sales in Germany, 2019-2031 (EUR Bn)

