

Soft drinks



SOFT DRINKS REIMAGINED

Nichols

Driving category value

DETAILS

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KEY BRANDS

Vimto Squash Range
Vimto Fizzy Range
Vimto Still Range
Levi Roots
Feel Good Drinks
Sunkist

Source

¹ Wellbeing 2021: Health Undefined. November 2020.
² Kantar Worldpanel, Usage, MAT to 21.03.21
³ Innova Market Insights, Consumer Lifestyle and Attitudes Survey; Fortune Business Insights, Food & Beverages 2021
⁴ Vitamin C&D is in the following Vimto squash products: Vimto Original, Vimto No Added Sugar, Vimto Orange, Strawberry & Lime, Vimto Mango, Strawberry & Pineapple and Winter Warmer. All flavours contain Vitamin D.
⁵ Gov.co.uk, Nov 2020
⁶ Nielsen, Total Coverage, MAT to 11.09.21 – fastest growing brand of brands worth over £35m
⁷ Nielsen, Squash, Grocery Multiples MAT to 11.09.21 – within brands greater than £30m
⁸ Nielsen, Squash, Total Coverage, North West, MAT to 11.09.21
⁹ Nielsen, Total Coverage, MAT to 11.09.21
¹⁰ Nielsen, Grocery Multiples, MAT to 11.09.21
¹¹ Nielsen, Grocery Multiples, MAT to 11.09.21 - within brands greater than £30m

↙ The events of the past year have significantly impacted consumer trends and shopping habits, and Nichols predicts that some of these will continue to be relevant as it looks to the future.

“There was an evolved focus on wellbeing and more time given to the consideration of health¹,” it says. “Squash performed phenomenally well, not least as we saw more time being spent at home and the consumption of tap water increase. Additionally, consumers proactively sought out enhanced hydration options². Making ‘mindful choices’ continues to be an important factor for consumers at the point of purchase and there is an increased need for functional beverages³.”

Vitamin fortification in Vimto

“2021 marked a milestone for us as we became the first squash brand to offer both Vitamin C & D liquid fortification⁴,” reveals the company. “With Public Health England also endorsing a daily supplement of Vitamin D⁵, particularly for children, the fortification of Vitamin D into the core Vimto Squash range aims to make healthier choices easier, especially for parents.

“This launch celebrates both flavour and functional health benefits, providing consumers with additional reasons to shop the category to drive long-term sustainable value growth. As the No.2 squash brand⁶, the fastest-growing in the UK nationally⁷, and the No.1 in the north west⁸, we are proud to continue to lead the way in reframing the category.”

Fizzing fizzy drinks

While health has been front of mind, enjoyment and the opportunity for exploration have also remained key for consumers, says Nichols. “Flavoured carbonates, in particular, have experienced a 7.1% increase in value sales⁹ and our Vimto carbonates range, which includes Vimto Fizzy and Vimto Fizzy Zero, is no exception, having grown by 8.8% in value sales within grocery during the past 12 months¹⁰.”



“The notion of mindful choices continues to play an important factor for consumers at the point of purchase”

This is understandable, as Vimto take-home formats have increased significantly in sales and been the key driver of growth¹¹, bolstered by the variety of our take-home pack portfolio.

“Delivering unique and distinctive flavours is what sets us apart in this category and the refreshingly different taste of Vimto is at the heart of our offering,” it adds. “Customers tend to gravitate towards brands that they know and trust, and with over 100 years of rich heritage, consumers can rely on Vimto to provide quality and taste reassurance.

“With this in mind, our developments this year did exactly that: grabbing attention with our new visual identity for Vimto and our biggest marketing campaign to date; introducing a category first, with the fortification of Vitamin C & D within our squash offering, which tapped into consumer health trends while continuing to deliver on the taste and quality that we are known for; and launching new flavours for consumers to explore and engage with.

“We continue to take pride in providing customers with popular flavours, innovations and formats that will not only drive sales, but provide something new to encourage them to explore the category.

“It has never been a more exciting time for the soft drinks industry and we are looking forward to building on our 2021 momentum as we proceed into 2022, continuing to work with our customers to drive category value.”



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Analysis

Energy and health drive market

Impulse purchases in soft drinks are reviving, as Covid-19 lockdown restrictions have eased. Yet British consumers' focus has shifted towards health and wellness, creating spikes in demand for functional and energy drinks

Despite a general consensus among soft drinks suppliers that the on-the-go market is recovering rapidly, there is an awareness that the loyalty to multipacks built over the lockdown periods of the Covid-19 pandemic is not going to disappear. Rather, the industry has realised that it can now capitalise on both fronts, retaining the multipack for the ongoing Big Night In occasion, but returning to a revival in the impulse and on-the-go sector, especially for energy and functional soft drinks.

“Our latest research shows that on-the-go soft drinks are very much back in business and there is a clear opportunity for retailers to drive sales as a result,” says Britvic at-home commercial director Ben Parker. “As lockdown restrictions have eased,

61% of shoppers claim they expect to consume on-the-go soft drinks even more¹, showing a renewed opportunity for convenience stores across the country. In fact, of the 2,000 Brits who participated in our survey, 29% are already enjoying soft drinks on-the-go once a day¹ and 58% claim to do so at least once a week¹, so the demand for drink-now formats is already clear.”

iPRO global commercial director Sophie Christy points out that the global vending machine market is poised to grow by £6.85bn between 2021 and 2025², fuelled by demand for quick access to high-quality drinks, with fewer touchpoints and contactless payment options, suggesting ongoing increased demand for on-the-go food and drink purchases.

With people out and about more,

value sales of smaller packs at Coca-Cola Europacific Partners (CCEP) GB have grown by nearly one-fifth (+18.6%)³, reports Martin Attock, vice-president, commercial development. However this increase has not been at the expense of take-home packs, which have continued to grow over the past 12 weeks³, including sectors like RTD coffee and energy drinks, which pre-Covid arguably lent themselves more to consumption on-the-go.

At Suntory Beverage & Food GB&I, sales director Alpesh Mistry says: “The impulse occasion is coming back to the forefront with consumers on-the-go again, which is great news.” However he notes that £143m⁴ has been added to the soft drinks category through increased multipack [take-home] sales during lockdown. “So it is crucial that



Coffee time

RTD coffee, worth £191m and growing at a rate of 30%ⁱ, is the fastest-growing segment in soft drinksⁱ, says Martin Attock, VP commercial development at CCEP GB. Although it still only accounted for 2% of soft drinks sales in 2020, it accounted for 7% of soft drinks category value growthⁱⁱ, because of its high pence per litre, he notes. “Costa Coffee RTD has a key role to play in unlocking that opportunity and is currently in 35% growthⁱⁱⁱ,” he says, adding that RTD coffee’s versatility will ensure its continued strong performance.

“Iced coffee offers a great alternative to alcoholic drinks and carbonated soft drinks,” says Jo Taylor, brand manager at Crediton Dairy, owner Arctic Iced Coffee. “It gives you that added boost through caffeine without the need for alcohol or excessive amounts of sugar. There is considerable opportunity for growth, all year round. With the introduction of more limited-edition flavours and a younger consumer less concerned about the weather when it comes to their drinks selection, sales are likely to continue to grow.” The iced coffee category is predicted to double by 2025, she adds.

retailers understand the trends and cater for changing habits to continue to see category growth.”

Crediton Dairy head of marketing & insight Abigail Kelly says: “When we look at the period to 52 w/e 13 June 2021, so capturing the impact of the pandemic, sales are definitely coming back. Comparing the 12 weeks data vs the 52-week data, you can see that impulse drinks are clawing their way back, up 23% in volume year-on-year (YOY) vs +2% in the 52-week picture⁵. In-home sales also continue to grow, up 8% in the latest 12 weeks, which while slowing down, is still in a healthy position⁵.”

Radnor Hills managing director William Watkins describes the last year as “a rollercoaster for all of us in the soft drinks industry”. “We have seen very quiet periods, which have dramatically

changed and it feels like we have gone from zero to 100 miles per hour several times this year,” he says. “Overall, the demand for soft drinks has returned with a vengeance along with new developments and new packaging formats, so it has been an exciting and positive end to a challenging year.”

In the wake of the pandemic, consumers are thirsty for change, excitement and talkability, and are fatigued by the same category choices, says Terri Cooper senior commercial manager at Refresco Drinks UK. “With more than 20% of Brits now identifying as non-drinkers and 10.6m consumers actively avoiding alcohol⁶, there has never been more emphasis on the soft drinks range on offer, and ensuring that it excites shoppers while being versatile to maximise sales.”

Energy up, alcohol down

“Energy drinks present a growing opportunity for retailers, worth nearly £1.4bn in Great Britain in recent years⁷,” says CCEP’s Attock. “The sector has diversified heavily and now offers a variety of flavours, juice blends and functional benefits. This has taken Monster from challenger brand status in GB to become the No.1 deliverer of value growth in soft drinks⁸, adding nearly £98m of value in the past year alone⁸ to secure its highest-ever sector share⁹.”

“The way people live is changing – health is becoming more important and, especially with younger shoppers, we’re seeing an increase in demand for lower-calorie products and a significant reduction in the consumption of alcohol,” says Barr Soft Drinks marketing director Adrian Troy.

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“Shoppers are now looking for more functionality from an energy product and flavoured energy has grown by £21m in the last year¹⁰ highlighting the importance of the category. Energy should be given its fair share of space on the fixture to offer the choice of flavours that shoppers are looking for, which will ultimately increase retailers’ profits.”

Meanwhile, within the sports & energy category, itself growing at 17.6% YTD¹¹, the sub-sector growing fastest is functional, which is up 20.1% vs YA¹², reveals Red Bull. The company says that it is helping to drive this success with insight-led range extensions and creative new shopper recruitment. Both multipacks and single-serves are performing well and Red Bull’s single formats have driven growth significantly in the sector, it says, up 18.3% vs 2020 and adding £61m in value to the overall category¹².

Grenade, which has secured its position in the protein bar category, has spotted the potential in energy drinks and launched its new range “to evolve the category” earlier this year, says general manager (drinks) Dan Broughton. Functional energy drinks is the fastest-growing sub-sector in the category, worth £240m¹³, he says. The entire Grenade Energy range comprises natural or plant-based ingredients, which he says marks a real step-change within the category. “The spotlight on health and the government’s re-energised anti-obesity campaign is likely to spur on higher levels of physical activity, fuelling demand for sports and energy drinks,” says Broughton. “However, the greater focus on weight management could also mean some people will question the calorie and sugar content of the drinks more. Notably, 44% of consumers currently believe energy drinks contain too much sugar¹⁴, so brands should take heed. Also, 33% of people are turned off by energy drinks that contain too many artificial ingredients¹⁴.”

“The energy drinks category now accounts for a quarter of all soft drinks sales¹⁵,” says Boost Drinks founder and CEO Simon Gray. “Within this, flavours account for 38% of the stimulation market¹⁶. However, there is still a high demand for original energy flavours.”

To increase relevance and expand consumption occasions requires the right pack in the right place for the



right occasion, notes Suntory’s Mistry. “Seventy-five per cent¹⁷ of people are concerned about their levels of tiredness and stress. It is through insight like this that we have launched Lucozade Alert, our new stimulation drink. Stimulation drinks remain the fastest-growing soft drinks segment¹⁸, worth £1bn¹⁹.”

Health and functional wellness

Customers are becoming more health-conscious than ever before with Gen Z in particular increasingly looking for healthier, no and low sugar options²⁰, says Boost Drinks’ Gray. “Since the introduction of the sugar tax, we have seen a sales shift towards sugar-free drinks, with a rise of 17% year-on-year²¹.

“We are seeing consumers become considerably more health-conscious, with 59% of people stating that, since the start of the pandemic, they are considering their health more when they shop²²,” says Britvic’s Parker. An additional one in five people have

begun to take vitamins since the start of the first lockdown, while 47% agree they will eat more foods to support their immune system²³. These health trends, accelerated by the pandemic have driven the growth of the wellness drinks segment.”

“More than four in 10 consumers have increased their purchase of functional beverages since the pandemic started,” says iPRO’s Christy. “Consumers are choosing beverages fortified with vitamins for immunity support as they adopt an increasingly holistic and proactive approach to their health and wellbeing. The importance of a healthy immune system has likely played a part in this growing interest in health and the importance of an active and healthy lifestyle alongside a balanced diet. Sufficient hydration is essential to maintain physical and cognitive functions, so functionally enriched spring water-based drinks can contribute hugely to this.”

Why tropical is topical

Tropical and exotic flavours are coming to the fore.

Both exotic and berry flavours are extremely popular, says Nichols marketing director Emma Hunt, noting that it has introduced a new No Added Sugar Blackberry, Raspberry & Blueberry flavour to its squash line-up, while the latest innovation in its Levi Roots range is Tropical Punch. “Shoppers are actively looking for inspiration and wider world flavours,” she notes.

“Consumers have an increasing thirst for discovery coupled with access to a vast range of influences from around the world, and this is driving their curiosity to explore different flavours,” says Remedy Drinks UK general manager Anna Dominey. “We value input from our

global community when considering which new flavours to create and it was this community who helped us to reach the decision to launch Remedy Kombucha Mango Passion, our latest flavour in the UK.”

Belvoir Farm launched its Passionfruit Martini earlier this year, made with passion fruit, lime and Madagascan Vanilla and has followed this up with Peach Bellini, while at Boost, the company introduced a new Mango 250ml Energy SKU in April. CEO Simon Gray says it is the only mainstream brand to offer this “on-trend Mango flavour” in a 250ml size can, “which is one of the fastest-growing flavours in the energy drinks category up 22% year on year in volume sales^a.”

Red Bull confirms that its tropical and exotic flavours

are growing at a rate of 37% vs all other mainstream flavours on offer^b. Flavours in Red Bull Editions include Tropical, Coconut & Berry and Red, while Cactus Fruit will become the latest permanent addition to the range, available from November this year.

Radnor Hills managing director William Watkins says the company likes to offer more traditional flavours but with a twist, such as its Lemon & Mint Radnor Infusions. “However, there is growing interest for more exotic flavours, which our Mango & Pineapple offers,” he says. “It may not seem like an obvious choice of flavours, but it has been extremely well received.”

The Gutsy Captain’s new Zero range, “the fastest-selling kombucha SKU in

supermarkets^d”, features six flavours – Original, Ginger & Lemon, Pomegranate, Watermelon & Mint, Passionfruit and Raspberry, notes chief marketing officer Inês Freitas.

Adult soft drink Shloer has added a limited-edition Pineapple & Lime version to “bring an exciting exotic new angle to its drinks”, reports SHS Drinks head of marketing Sarah Lawson.

Topo Chico Hard Seltzer in Tangy Lemon Lime, Tropical Mango and Cherry Acai flavours is the latest addition to CCEP’s range in Great Britain, while Suntory has also embraced the tropical trend, with Lucozade Zero Tropical introduced in February and Tropical Burst and Cherry Blast being the two flavour choices for its new Lucozade Alert addition.

“Eighty-nine percent of shoppers are trying to improve their diet, with 29% trying to reduce the amount of sugar they consume²⁴,” says CCEP’s Attock. The HFSS restrictions coming into force indicate it’s clear the government is keen to encourage this behaviour.

The Covid-19 pandemic has led to extended stress and anxiety for many people, says Belvoir Farm managing director Pev Manners. “More than ever, we are seeing wellness, calm and a reconnection with nature. Shoppers are looking for more from what they eat and drink both in terms of ingredient integrity and sustainability, Ingredients such as ginger, known to boost health and immunity will also be a focus, alongside drinks to aid focus, relaxation and mood.”

“In many ways the CBD and other functional adaptogens and nootropics in our products are the perfect remedies for the stress and anxiety experienced in the times we live in,”

says Adam Feldheim, CEO and founder of Medahuman. “Functional drinks will continue to have an important role to play as people recognise that their health can benefit from incorporating innovative wellness products into their daily regimes.

“The pandemic has presented a step-change in behaviour and thinking, and the implications for consumers choices will be realised for years to come,” he adds. Functional ingredients will become increasingly dominant, especially as people now return to juggling busy work and social lives in a new world order, which will pave the way for the rise of consumers seeking transformational benefits, so those looking to live healthier and wiser, and more ethically.”

Meanwhile, Get More Vits notes: “Health and wellness is no longer a trend, more a way of life, with consumers more aware than ever of the importance of keeping minds and

bodies in good order.” While sales of the company’s main SKU Vit D 500ml dropped by nearly two-thirds at the start of the first lockdown in March/April 2020, sales have rebounded and are now back to pre-Covid levels and still forging ahead, says the company. The winter time presents a major sales opportunity for the brand, it adds, as consumers become more aware of the need to stay healthy and keep their immune systems fighting fit.

Nichols marketing director Emma Hunt says 2021 marked a milestone for the company’s Vimto brand as it became “the first and only squash brand to offer both Vitamin C & D fortification”. There is a greater emphasis now on consumer requirements for functional beverages as they increasingly look for additional health benefits from their food and drink, she adds.

“Consumers are becoming very conscious of artificial additives and the

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consistent health advice to avoid them wherever possible,” says iPRO’s Christy. “This trend is only going to get stronger as people learn that products that are natural and low sugar are much better for you. Soft drinks have even more consumer appeal if they are enriched with electrolytes, vitamins and minerals to help optimise healthy hydration.”

Kombucha, produced from a base of green tea, then fermented with a symbiotic culture of bacteria and a yeast called Scoby, can help improve gut health as part of a balanced diet, says Red Star Brands chief marketing officer Inês Freitas. Purchasers of its brand, The Gutsy Captain, are typically aged 25-44 and focused on their wellness, fitness and mental health, believing that what they consumer has a direct impact on their wellbeing. She says the kombucha category in the UK is now estimated to be worth £12.8m, with a growth rate of 53% YOY²⁵.

“Exacerbated by the pandemic, health and wellness became a key priority for many consumers²⁶,” says Freitas. To meet the needs of consumers looking to boost immunity ahead of the winter months and improve gut health while also being mindful of calories, the brand introduced a Zero range, which is sugar- and calorie-free.

Remedy Drinks general manager Anna Dominey points to the positive performance of kombucha over the past year, with “take-home sales having grown by 92%, volumes by 198.6% and penetration up by 100.3%²⁷”, she says. The company secured its biggest listing to date during lockdown, becoming “the first kombucha brand to roll out across Tesco superstores nationwide”.

“Health and wellbeing have become omnipresent in people’s daily lives, and consumers are now prioritising flavours and ingredients that are better for the mind and body,” she says. “Switching a drink from one that is full of sugar and/or artificial sweeteners to one without is a relatively simple change to make to your diet and one that has huge benefits. Wellness isn’t going anywhere and consumers will continue to become more and more aware of what they’re putting into their bodies to fuel it.”

One of the key developments in soft drinks is that consumers are becoming less used to sweet drinks, says Radnor Hills’ Watkins. “This bodes well for



the emerging Radnor Infusions range that we recently launched in the seltzer market,” he says. “We have already seen this become a significant part of the US market and my prediction is that this same market will rapidly arrive in the UK.”

Even as Christmas approaches, consumers are increasingly cutting down on their consumption of alcohol and adult soft drinks (ASD) are stepping up to fill the gap. Shloer has consistently accounted for two of the top three ASD sharing bottle SKUs in grocery²⁸, says SHS Drinks head of marketing Sarah Lawson. “Shloer really comes into its own over the festive season.” In particular, the company’s Shloer Pink Bubbly has grown by 28% over the last year²⁹, she reports.

Diverse future

During the upcoming Christmas season, alcohol moderation will still important for consumers who are

looking to keep their overall health and wellness in check, paving the way for alternatives, says Britvic’s Parker. “Mixers will have renewed part to play as consumers want to get back to being out and about and look to elevate their out-of-home experiences. As a result, when it comes to the on-trade, premium mixers now account for 42% of all mixers value, up 20% YOY³⁰.”

Refresco’s Cooper says the lines between the soft drinks and mixer categories are increasingly blurring and showing similar trends and influences. As such, she says, ginger beer, which the company offers under its Old Jamaica brand, proves to be a versatile mixer across all spirits categories. As such its product, in two flavours – Ginger Ale and Rhubarb – can either pair with different spirits or provide “flavoursome solus serves”.

“The UK’s £9.6bn soft drinks category is one of the most profitable



HFSS legislation on the horizon

While the HFSS regulations will present many challenges for retailers, which will require collaboration with suppliers to work through, there can be a real opportunity for soft drinks, says CCEP GB vice-president commercial development Martin Attock. “Soft drinks is far ahead of other HFSS-impacted categories in terms of sugar reduction, having reduced sugar by more than 17% since 2018^{iv},” he says. “And that’s been achieved while delivering 15% volume growth in the same period^{iv}. The net result is that 77% of soft drinks value sales

in grocery already come from HFSS-compliant products^v, significantly more than other HFSS categories, many of which are still far below 10%^v.”

Many of the soft drinks suppliers featured here claim to be already HFSS-compliant on the majority of their brands – for example, Britvic (which expects 88% of its GB-packaged products to be either HFSS-compliant or exempt when the legislation comes into force in October 2022. “This means we can take advantage of the high visibility fixtures in-store to draw shoppers’ attention to segments

that wouldn’t usually be given the same level of prominence, such as wellness drinks, infused waters, cordials and premium mixers,” says at-home commercial director Ben Parker.

“We are in total support of the government’s drive to hold brands accountable for the ingredients in their products,” says iPRO’s Christy. “To function at our best, our bodies require high-quality natural ingredients. We only use natural spring water and the highest-quality stevia, with every ingredient having a health benefit. Many manufacturers and soft drinks brands, which have

reformulated sugary drinks to adhere to the sugar tax guidelines, haven’t simply taken out sugar; to keep customers sweet, they have substituted sugar with artificial sweeteners designed to mimic the sweetness of sugar.”

While currently considering all options to address the HFSS guidelines, SHS Drinks head of marketing Sarah Lawson says the “one single certainty at this juncture is that we will not compromise on taste delivery”. Whatever direction it takes with its Shloer brand, she notes, it will be “underpinned by extensive consumer research”.

categories for retailers and continues to grow by 13.3%³¹,” says Barr Soft Drinks’ Troy. “As Covid recovery continues, we expect to see sustained growth as brand owners continue to adapt to changing consumer and shopper demands, be it their increased focus on sustainability, changing pack formats to meet new occasions or new drinks and flavours to meet emerging taste trends.”

Suppliers are in no doubt that certain consumer patterns adopted during the Covid-10 pandemic are here to stay. “We believe the changes we’ve seen over the last 18 months have been extensive enough for habits to stick and lifestyles to change,” says CCEP’s Attock. This means there are more occasions for soft drinks in all sectors to meet in the long term.”

The adult soft drinks category is seeing strong growth, up 19% in value YTD³², says Belvoir Farm’s Manners. “As the UK opens up further we expect

the market to continue to grow with exciting NPD, while HFSS at the end of 2022 will represent a challenge.”

“The ASD category is in good health,” confirms SHS Drinks’ Lawson. Sales have grown strongly over the last year and reflecting the six macro trends we identify – health & wellbeing; the rise in home consumption occasions; indulgent rewards; pack formats to match occasions; discovery; and the conscious consumer – we predict that performance will be maintained over the next 12 months.”

Grenade’s Broughton expects the market to see a return to the strong pre-pandemic growth, supported by the increase in consumer spending and the rise of leisure occasions as consumers’ safety concerns lessen. “This is evident through wellness drinks delivering 14.6% growth over the last two years, exceeding the 4.3% growth of the total soft drinks category in the same period³³,” he says. “More can be done

to harness this interest in the category, with 72% of category users agreeing that energy drinks with added health benefits appeal to them³⁴.”

If kombucha continues at its current trajectory, the sector could be worth up to £32m by 2025, according to Red Star Brands’ Freitas. In recent years, the category has concentrated on making kombucha mainstream, broadening its appeal and increasing shoppers’ understanding, so they reach for it intuitively, she notes. “Moving forwards the Zero range will help to drive incremental category growth for the brand by attracting consumers who do not consistently purchase kombucha because of current sugar levels,” she adds.

If compared to other markets around the globe, the room for growth in the live cultured drinks category is phenomenal, says Remedy Drinks’ Dominey. “If the UK category was the same size as the Australian one on a

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per capita basis, for example, it could be worth £250m in the next five years.”

Radnor Hills’ Watkins points to some important trends driving soft drinks sectors, such as environmental sustainability, the increasing demand for low-sugar and unsweetened drinks and the provenance of ingredients. “Having our spring water in cans offers a different format of packaging and can open up the market to a new audience,” he says.

There is undoubted excitement among suppliers that the future of the soft drinks category remains diverse and with plenty of innovation potential.

“Given the radically changing landscape, it remains an exciting time to be part of the soft drinks industry as we move into 2022,” says Nichols’ Hunt. “How consumer purchasing habits develop in our ‘new normal’ will inspire innovation across the category and grocery as a whole. Following fantastic growth during lockdown, we predict that the squash category will experience an initial value decline. However, we will see some stabilisation at a higher retail value than before. This will be due to consumers having discovered the healthy accessible hydration benefits of squash.

“Moving into the new year, innovation and excitement at point of purchase and online will be key to grabbing shoppers’ attention and this will form an important part of our plans.”

Covid-19 helped to focus consumers minds on looking after their health, as well as taking a moment to enjoy a little treat when they can, notes Suntory’s Mistry. “Forty-seven percent of people says they have cut back on their alcohol intake for health reasons³⁵, while 55% of people are expecting to enjoy more friends and family celebrations in the future³⁵. This helps to provide a strong base of growth for the soft drinks category.”

Meanwhile, brands in the health & wellness sector are relishing their future prospects

“The year ahead is an exciting time for the health & wellness sector as it moves more firmly into the mainstream and becomes more of an integral part of consumers’ daily lives, says Get More Vits. “We strive to create innovative drinks that enable consumers to effortlessly keep their daily vitamin levels topped up without compromising



on taste or adding unnecessary sugar or calories into their diets. Brands that keep enjoyment and refreshment at the forefront of their product ranges will be well placed to quench the thirst of a much more health-aware public into 2022 and beyond.”

“The new normal looks very positive for products like Medahuman that are

hitting the shelves,” says Feldheim. “We are at the forefront of an incredibly exciting movement in this evolving soft drinks industry, tapping into something much more meaningful and exciting for consumers. A drink that doesn’t just refresh, but nourishes, balances and helps you be the best version of yourself... it’s a whole new frontier.”

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- ¹³ Nielsen Home, Total GB, 24 w/e 08.08.20
- ¹⁴ Lightspeed/Mintel, Sports &

- Energy Drinks UK, April 2021
- ¹⁵ IRI Marketplace Data, Symbols & Independents, 52 weeks unit sales to 27.12.20
- ¹⁶ IRI Marketplace Data, Symbols & Independents, 52 weeks volume sales to 13.06.21
- ¹⁷ Catcom and Suntory GBI Category Strategy Research 2020
- ¹⁸ IRI, Total Market, £ absolute and % value sales growth vs year ago, 52 w/e 22.08.21
- ¹⁹ IRI, Total Market, Value sales/% value share of Soft Drinks, 52 w/e 22.08.21
- ²⁰ <https://tinyurl.com/a5yhme99>
- ²¹ <https://tinyurl.com/z65ww6fy>
- ²² Accenture, Covid-19 Consumer Research, conducted 19-25.03.20 and 2-6.04.20
- ²³ IGD ShopperVista, Has Covid kickstarted new health trends, 10.09.20
- ²⁴ <https://tinyurl.com/rxhpdhs4>
- ²⁵ IRI Marketplace data to 06.09.20 (filtered to Impulse

- Soft Drinks)
- ²⁶ Mintel 2021, <https://tinyurl.com/dkm2p6mh>
- ²⁷ Kantar, w/e 08.08.21
- ²⁸ Nielsen UK, Take Home Multis, ASD Category, Value (£), sales MAT 11.09.21 (Shloer 750ml White/Red Grape)
- ²⁹ Nielsen UK Take Home Multis, ASD Category, Value (£) and Volume (L), Sales MAT, 11.09.21
- ³⁰ Nielsen IQ RMS, Total Coverage, Britvic Defined Premium Mixers, Value 52 w/e to 26.08.20 vs 2YA
- ³¹ IRI Marketplace, Value Sales 52 w/e 28.08.21
- ³² IRI Total Market, Ready to Drink, Value Sales, YTD 14.08.21 vs previous years
- ³³ Nielsen, data supplied by Grenade
- ³⁴ Lightspeed/Mintel, Sports & Energy Drinks UK, April 2021
- ³⁵ Catcom and Suntory GBI Category Strategy Research 2020

Coffee panel

- ⁱ Nielsen (Home Channel) Value MAT Total GN to 19.06.21
- ⁱⁱ Nielsen Total Market FY2020
- ⁱⁱⁱ Nielsen Total Coverage, MAT Value 19.06.21

Tropical panel

- ^a IRI Marketplace Data, Symbols & Independents, 52 weeks Volume sales to 06.09.20
- ^b Nielsen Value Sales MAT vs YA 52 weeks ending 28.08.21
- ^c Nielsen Value Sales, Total GB L 12w to 22.09.21
- ^d IRI Marketplace data L12 wks to 06.09.20

HFSS panel

- ^{iv} Kantar Take Home Nutritional Data, 52 w/e 11.07.21 vs 11.07.17
- ^v Kantar Take Home, % HFSS Spend MAT 21.02.21

MEDAHUMAN



CBD drink with a purpose

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KEY BRANDS

- MEDAHUMAN
- RELAX
- RECOVER
- NIGHT
- GLOW
- ENERGY

Since the Covid-19 pandemic, the growing consumer interest in health and wellness products means there has never been a better time for CBD functional wellness drinks to come to the fore, explains Medahuman founder Adam Feldheim.

The Medahuman product offers a powerful combination of CBD plus functional ingredients, a step up from most other CBD products in the market, it says. While CBD is a very important ingredient, it's the synergy with other botanical extracts, vitamins and minerals that delivers the efficacy and targeted wellness benefits.

The power of Energy

Energy, the newest addition to the range, offers a blend of CBD and other botanical ingredients, plus the inclusion of natural caffeine at a reduced dosage compared to many other energy products on the market. This rejuvenating option is for anyone looking to aid their productivity and concentration, or in need of an extra boost before heading to the gym.

Every 250ml can features 20mg of premium organically derived, broad-spectrum CBD infused with powerful adaptogens, nootropics and nutrients known to enhance brain health, boost cognitive performance and help reduce mental and physical stress, crafted with natural ingredients for optimal absorption and effectiveness. Made in the UK, it is vegan, gluten-free and low-calorie, and all materials are recyclable.



To ease anxiety



To reduce inflammation



To aid sleep



For energy and focus



For radiant skin

Deliciously purposeful.

AQUA Carpatica

Healthy rise for natural water

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KEY BRANDS

AQUA Carpatica Natural Mineral Water

Despite the challenges of 2020, Aqua Carpatica continues to grow as society takes an increasingly holistic view of their wellbeing following the Covid-19 health crisis. Key market trends have indicated a clear shift and increased demand for natural mineral water due its perceived health benefits.

Meeting the growing consumer demand for premiumisation and health, Aqua Carpatica's award-winning natural mineral water is the first of its kind in the UK: virtually nitrate-free, one of the lowest sodium levels of bottled natural mineral waters and naturally packed with electrolytes.

Consumers' understanding of wise hydration is only set to grow, says the company. The demand for products that cater to a healthy lifestyle will continue to gain momentum as increasingly savvy consumers recognise the value of natural propositions, with no ingredients artificially added, seeking out natural goodness, traceability, health benefits and ingredient transparency.

Aqua Carpatica stands out in this competitive sector as one of the purest natural mineral waters on the market, it says. Drawn from pure aquifers, nestled deep in the heart of the Carpathian Mountains, Aqua Carpatica combines an exceptionally balanced mineral content of calcium and magnesium, a great choice for health-conscious consumers. The range consists of an extensive portfolio in various formats, still and sparkling, packed in glass, 100% rPET and PET (BPA-free). They suit all occasions and all ages, notes the company, adding that its innovative Aqua Carpatica Kids bottle, with the spill-proof sippy cap, was designed with the health of children in mind.



“Consumers’ understanding of wise hydration is only set to grow. The demand for products that cater to a healthy lifestyle will continue to gain momentum”

“Building an online community around the values of the brand and engaging with it helped amplify visibility and gave a boost in sales,” it says. “Fostering this community, which values the unique qualities of Aqua Carpatica, helps to build brand loyalty as well as educate the wider audience on the benefits of healthy hydration. Communicating this through valuable, carefully curated social media content is very important.”

Sustainability remains a key issue for Aqua Carpatica. Driven by a promise to care for and protect the natural springs and environment that surrounds them, the company remains committed to the people and the planet and has launched four 100% rPET products on the UK market: 100% recycled and recyclable. It is also developing NPDs in line with this company ethos.

“Our biggest challenge is slowly turning into our success story: to encourage our consumers to look past the bottle and discover the outstanding quality of our water,” it says. “2020 influenced our attitudes, needs, health and expectations. Aqua Carpatica is here to remind consumers about value-added and not simply value. Let’s not take things for granted any more, starting with our health.”

Mountain Born HYDRATION



aquacarpatica.co.uk



Naturally alkaline



Natural mineral water



Virtually nitrate free



Naturally low sodium

Barr Soft Drinks

RAW attraction for shoppers

DETAILS

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KEY BRANDS

IRN-BRU
Rubicon RAW
Strathmore

Launched in February, Rubicon Raw quickly made an impact on the UK's energy drinks market, selling 7 million cans in the first seven months¹, says Barr Soft Drinks.

The big can energy drink is designed to meet the needs of today's developing energy consumers and is an innovation built on a foundation of consumer insight, offering something new and truly different to today's energy drinks market, it says.

Made with 20% fruit juice, natural caffeine, B-Vitamins, ginseng and guarana, the Rubicon Raw range consists of three variants – Raspberry & Blueberry, Orange & Mango and Cherry & Pomegranate, with natural flavours and no artificial colours.

Adrian Troy, marketing director at Barr Soft Drinks, says: "We're already seeing a phenomenal response, with Rubicon Raw becoming the fourth-largest flavoured big can energy brand in the market, in both volume and value².

"Energy has grown to become the top 'drink now' segment of soft drinks, worth £1.3bn, with big can energy driving the growth, up 19%³. Consumers are increasingly opting for flavoured variants when choosing an energy drink, with flavoured energy now accounting for 53% of the mainstream energy market and growing faster than non fruit energy⁴.

"82% of people who are aware of Rubicon Raw have gone on to try it, with over 50% then repurchasing it more than three times and 31% of Rubicon Raw consumers drinking it weekly⁵. We believe that's because we listened to energy consumers and



“Energy has grown to become the top ‘drink now’ segment of soft drinks, worth £1.3bn, with big can energy driving the growth, up 19%³”

invested heavily to create a product that met their needs.

"While they may have adopted the category as young adults, many have matured and evolved as consumers since then. At an average age of 31, they are life maximisers – people who want to get the most out of life. Energy drinks fuel that lifestyle⁶."

People's needs have always driven the energy category, says Troy, with four major needs states driving big can consumption: 'peak performers' are active, sporty consumers using big can energy to fuel performance; 'work fuellers' are pre-family with demanding jobs, who want energy to focus on the task at hand; 'mood enhancers' are busy families juggling childcare, lifestyle and work commitments; and 'pleasure seekers' are the young adults socially drinking big can energy with their peers.

"The category has to be exciting and varied to keep these shoppers engaged," adds Troy. "The primary reason consumers like Rubicon Raw is that it's made with 20% real fruit juice⁷, which together with caffeine from green coffee beans and B-vitamins provides a big energy hit, full of flavour.

"We are also bringing in new shoppers who have that energy need, but just haven't yet found the brand that's right for them."

The brand is being supported by a £1.5m consumer, social and shopper marketing campaign.



Source

- ¹ AG Barr Sales data
- ² IRI, All Outlets, Value Sales, Energy Drinks, 13 w/e 04.09.21
- ³ IRI, All Outlets, Value Sales, Sports & Energy Drinks, Drink Now, 52 w/e 04.09.21
- ⁴ IRI, All Outlets, Volume Sales, Sports & Energy Drinks, 12 w/e 28.08.21
- ⁵ Basis Research, Brand and Comms Tracker: Energy market deep-dive. June-July 2021
- ⁶ TGI, Q1 2020 Survey
- ⁷ JVA, Consumer Research, November 2020

A GROWING FORCE OF NATURE



NATURAL CAFFEINE
B-VITAMINS
20% FRUIT JUICE



Belvoir Farm Drinks

A lot of bottle in-store for Christmas

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KEY BRANDS

Ginger Cordial, Ginger Beer
Non-Alcoholic
Passionfruit Martini
Non-Alcoholic Peach Bellini

Source

- ¹ IRI, Total Market, Premium Cordials, value sales 52w to 04.01.21 vs previous year
- ² IRI, Total Market, Belvoir RTD, value sales YTD 14.08.21 vs previous year
- ³ IRI, Total Market, Premium RTD brands by 750ml glass bottles, value sales YTD to 14.08.21 vs previous year
- ⁴ IRI, Major Multiples, RTD products with Zero sales w/e 22.08.20 to define 'new', value sales 52w 14.08.21

Belvoir Farm's premium soft drinks are enjoying growth in a challenging year that has seen innovative NPD, a creative out-of-home advertising campaign and a refreshing new look. Success in both cordial and sparkling ranges illustrates how shoppers are looking for natural ingredients, for wellness and for excitement in their soft drinks selection.

Belvoir shows strong YOY value growth in dilutable cordials, up 20% versus the same period in 2019 and with the highest brand value ROS in the category over this summer (last 12 weeks)¹. Its sparkling ready to drink line is also seeing 19% value growth² and is No.1 in premium 750ml sharing bottles³.

Non-Alcoholic Passionfruit Martini 750ml is the best-selling NPD within adult soft drinks⁴ and new Non-Alcoholic Peach Bellini 750ml now joins the range. "Our delicious mocktails deliver great-tasting, naturally sourced alternatives to classic alcoholic



Shoppers are looking for natural ingredients, wellness and excitement in soft drinks"

cocktails," says Belvoir Farm MD Pev Manners. "They're perfect for creating the cocktail-bar feel at home. Shoppers are looking for ingredient and brand integrity and, as a premium brand working closely with nature, our aim is always to deliver against that."

First established in 1984, Belvoir Farm's Bottesford plant fills 30 million bottles a year – sold across the world.

#1

PREMIUM READY TO DRINK*

Belvoir Farm

www.belvoirfarm.co.uk

* IRI Total Market, Premium Ready to Drink brands by 750ml glass bottles, value sales YTD to 14th August 2021 vs previous year.

Boost Drinks



Keeping one step ahead of trends

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KEY BRANDS

Boost
Rio

Boost Drinks continues to be a leading player in four functional drinks categories: energy, iced coffee, protein and sports drinks.

With strategic and well-researched NPD central to its success, Boost ensures it is always ahead of trends, says founder and CEO Simon Gray. “Exotic flavour profiles are in high demand at the moment, and capitalising on trending flavours is an excellent way to entice new consumers into the energy category. We recently launched a brand new Mango flavour, a flavour profile seeing 22%¹ value growth year-on-year (YOY).

“At Boost, we constantly look for new ways to help our retailers maximise their sales potential. The free eye-catching point-of-sale (POS) kits on our website help to draw consumer attention towards key fixtures and encourage impulse purchases.

“However, recent economic uncertainty has led to an increase in value-consciousness from consumers. Price-marked packs (PMPs) across our portfolio help retailers communicate value to their customers, without compromising on the promise of excellent cash margins.

Earlier this year, we also acquired the sales, marketing and distribution rights for the popular '90s drink Rio, giving the brand a huge revival, with double-digit growth YOY². Boost’s marketing and sales expertise in the independent convenience and wholesale market are now combined with Rio’s established equity and popularity.



THE NO.1 TAKE HOME 1LTR SKU*



Britvic Soft Drinks

Health and festivities in focus

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- J20
- Lipton
- Pepsi
- Pepsi MAX
- Purdey's
- Robinsons
- Rockstar
- Tango
- 7UP

“At Britvic, we have a continued innovation pipeline to engage shoppers across some of our most trusted and loved brands,” says Ben Parker, at-home commercial director for Britvic Soft Drinks. “This month, for example, we have launched Robinsons Fruit & Barley with added vitamins to help retailers capitalise on the ongoing health and wellness trend, accelerated by the pandemic¹. The product is available in five flavours – Orange, Peach (containing vitamins B, C&D), Summer Fruits, Apple & Pear, and Pink Grapefruit (containing vitamins B&C). The added C and D vitamins help support the immune system and the growth of strong bones, and B vitamins contribute to energy release, while maintaining the same great taste of Robinsons². The launch is set to boost awareness of the overall Robinsons range and encourages shoppers to try something new, with the added vitamins on-pack claim driving purchase among the growing number of health-conscious consumers.

“As we approach the festive season, and with many plans disrupted last year, this Christmas is set to be extra special with people keen to meet friends and family for social gatherings,” notes Parker. “Cordials will be key for these occasions, and our new Robinsons Fruit Cordial flavour is a great addition to these moments. Blackberry, Cranberry & Sloe cordial is highly versatile and has been launched in time for Christmas, but will be a permanent fixture for retailers all-year-round. Across our wider portfolio, in particular our no-sugar carbonates, we have continued our flavour innovation, launching Pepsi



“Christmas is set to be extra special, with people keen to meet friends and family for social gatherings. Cordials will be key for these occasions”

Max no caffeine, Pepsi Max Lime and Tango Dark Berry Sugar Free.

“Sustainability and environmental considerations are key responsibilities for us as a business, and our recent Recycle Week announcement has seen several brands move to 100% rPET bottles (recycled plastic), across single-serve 500ml and/or 600ml bottles³. This includes Pepsi Max, 7UP Free, Tango, Lipton Ice Tea, Robinsons Ready to Drink and drench. The change will be supported with clear on-pack messaging, outlet activation via POS materials and a new TV advert from Pepsi Max to drive awareness.

“Underpinning our innovation pipeline is an ongoing support plan to drive awareness of and engagement with our portfolio activity. Recent campaigns include our J20 on-pack promotion and marketing drive, featuring shimmering multipacks that give consumers the chance to win instant cash prizes via the brand’s Spin to Sparkle app, also supported by a national out-of-home advertising campaign and festive-themed POS.”

Source

¹ Mintel, Wellness Trends to Watch in 2021, January 2021
² All liquids have regulatory approval of reaching the minimum amount of dosage to state this claim (present at 7.5% of the R1/100ml)
³ All featured GB Pepsi and Britvic single-serve plastic bottles (500ml and 600ml), excluding caps/labels, are made from 100% recycled plastic. Larger bottles (over 1L) planned to change to 100% recycled plastic by the end of 2022



GRAB A BETTER BOTTLE...

100% RECYCLED*,
100% RECYCLABLE**,
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BRITVIC
soft drinks

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*All featured GB Pepsi and Britvic single serve plastic bottles (500ml and 600ml), excluding caps/labels, are made from 100% recycled plastic. Larger bottles (over 1L) planned to change to 100% recycled plastic by the end of 2022.

** Cap and bottle only

Coca-Cola Europacific Partners

Driving soft drinks success

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KEY BRANDS

- Coca-Cola original taste
- Diet Coke
- Coca-Cola Zero Sugar
- Coca-Cola Energy
- Coca-Cola Signature Mixers
- Fanta
- Dr Pepper
- Sprite
- Lilt
- Schweppes
- Schweppes Signature Collection
- Powerade
- Fuzetea
- Costa Coffee RTD
- Oasis
- Capri-Sun
- Glaceau Smartwater
- Monster Energy
- Relentless
- Reign Total Body Fuel

↙ The CCEP portfolio has played a key role in driving soft drinks success over the last year in retail, outperforming the category with 9.5% value growth – equating to an additional £243m worth of retail sales year-on-year¹, says the company.

Sparkling soft drinks like colas, flavoured carbonates and mixers continue to perform especially well², with a focus on trusted brands.

Coca-Cola™ remains the No.1 soft drinks brand in GB³, Fanta is the No.1 flavoured carbonates brand in GB⁴ – with a new Halloween TV commercial and on-pack promotion live now – and Schweppes mixers sell almost double the amount of volume in comparison to the nearest branded competitor⁵.

Sustained investment in innovation, marketing and promotions underpins this performance, says CCEP. “This year, we’ve unveiled a new design look and feel across Coca-Cola™, led by Coca-Cola Zero Sugar, which also debuted an evolved recipe to taste more like Coca-Cola Original Taste,” explains VP commercial development Martin Attock. “Coca-Cola Zero Sugar is the fastest-growing cola brand in GB⁶ this year and, to maintain momentum and tap in the health and wellness trend, Coca-Cola Zero Zero (no sugar and no caffeine) is currently rolling out nationwide in grocery.

“Most recently Coca-Cola™ has also revealed a new global brand philosophy and platform called Real



“To maintain momentum and tap into the health and wellness trend, Coca-Cola Zero Zero is currently rolling out nationwide in grocery”

Magic, which invites everyone to celebrate the real magic of humanity.

“Leading with our low- and zero-sugar products in our marketing and promotional activity has helped us reach a point where two-thirds of our volume sales now come from low- and no-sugar variants – 40% more than 10 years ago⁷. And that puts us in a strong position ahead of the high-fat, salt and sugar (HFSS) regulations coming into force in October 2022. The HFSS regulations will present challenges for retailers but we’ll work closely with our customers to help them take full advantage.

“Sustainability has long been at the heart of everything we do at CCEP, and we have continued to make big strides in 2021. We’ve switched to 100% recycled plastic in all our 500ml bottles, saving over 29,000 tonnes of virgin plastic each year. All of our bottles are also 100% recyclable.”

And now it’s nearly Christmas, a key time of year for Schweppes, and of course, Coca-Cola™ – not to forget the launch of Costa Coffee’s limited-edition Gingerbread Latte RTD, he adds. “Coca-Cola will mark the start of the festive season with a new on-pack promotion and other exciting campaign elements. Schweppes will be back on TV and across out-of-home advertising focused on festive serves – Rosemary Wreath, Jingle Fizz and Merry Spritzer – using Schweppes Indian Tonic, Slimline Elderflower Tonic and Pink Soda.”



Source

¹⁻⁴ Nielsen, Total GB, Value MAT to 19.06.21
⁵ Nielsen, Total GB, Volume MAT to 19.06.21
⁶ Nielsen Total GB, Value YTD to 19.06.21
⁷ 2020 This is Forward Status Summary data period FY 2020 – 67%

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Magic**
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customers

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EUROPACIFIC
PARTNERS

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*To enter, scan QR code on promo pack or visit xmas21.coca-cola.co.uk & enter code from promo pack between 15.11 - 25.12.21.
GB 16+ (U18s need parental consent). Purchase, internet access and online registration req'd. Chance to win instantly online. Prizes: 600 x £25,
1000 x £20 & 4300 x £10 e-vouchers. Prizes randomly allocated. 1st to enter on/after winning moment wins. No guarantee prizes will be won.
Bonus draw for 1 x £25 vch (26.12.21 - 23.01.22). For each valid entry a 25p donation will be made to FareShare up to max of £15.5k.
Max 2 entries/person/day. Max 1 win/person. Excl. apply. Full T&Cs: xmas21.coca-cola.co.uk Promoter: Coca-Cola GB. FareShare, Registered Charity Number: 1100051.
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Coca-Cola Europacific Partners

Monster leads energy charge

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KEY BRANDS

Monster
Relentless
Reign Total Body Fuel

➔ Monster has taken a leading role in evolving the energy drinks sector over the last five years, moving from challenger brand status in GB to become the No.1 deliverer of soft drinks category value growth¹ – adding nearly £98m of value in the past year alone², says CCEP. That takes the value of the brand to more than £374m³ and gives Monster its highest-ever sector share⁴.

When energy drinks first hit the market in GB back in the '90s, only a handful of products were available, all with a similar taste profile. But CCEP says that, in recent years, the sector has diversified heavily, to offer a variety of flavours, juice blends and functional benefits. “Energy drinks now offer the choice and great taste of soft drinks, but with added functional benefits. This has helped to increase the appeal of the Monster brand – and the wider sector – to more consumers, on more occasions. Monster is now a mainstream beverage.”

Monster benefits from a strong core range, alongside its popular Monster Ultra and Juiced ranges, which are both growing at a rate of 40%⁵. “All three ranges have benefited from great-tasting new launches in 2021,” notes CCEP’s VP commercial development Martin Attock. “Monster Mule is the first ginger-flavoured energy drink in GB, Monster Ultra Fiesta joins the No.1 zero sugar energy⁶ drink range to deliver a juicy mango flavour with no sugar and no calories, and Monster Juiced Monarch combines a mix of real peach and nectarine juices with Monster’s unique energy blend. Together, the three are already worth more than £12.5m⁷.

“As well as adding new and exciting flavours to its existing ranges, Monster has pushed the boundaries this year to give energy drink fans something they’ve never had before,” he adds. “Launched in April, Monster Nitro is supercharged with a blend of nitrous oxide and carbon dioxide in an exciting category-first, delivering a light, dry, carbonated texture that’s been well-received by both retailers and shoppers.”

But innovation is just part of the story behind Monster’s recent and future success, explains Attock. “Amid the decline of the impulse mission when



“In recent years, the energy drinks sector has diversified heavily to offer a variety of flavours, juice blends and functional benefits”



the Covid-19 pandemic first took hold, Monster pivoted quickly to cater for new, home-based consumer occasions with an expanded range of multi-pack cans. And it has become clear that, alongside the return of on-the-go purchases, those new occasions for energy drinks are here to stay. Alongside Monster’s high-profile sporting, fitness and motor sport sponsorships, the brand’s longstanding relationship with the gaming industry continues to reach fans at home via an exclusive new partnership and on-pack promotion with Apex Legends.”

As with all Monster promotions, retailers are creating theatre in-store around the Apex Legends activity – capturing shoppers’ imagination and bringing the iconic Monster culture to life, says Attock.

“Monster and CCEP have a presence in traditional, zero sugar, flavoured and performance energy segments – through Monster, Relentless, Monster HydroSport and the No. 1 performance energy brand⁸ Reign Total Body Fuel – meaning they are uniquely placed to advise retailers on ranging and merchandising best practice, including support when the new HFSS regulations come into force in October 2022.

“It has been a supercharged year for Monster,” concludes Attock, “with more great-tasting NPD and marketing plans to excite fans and recruit new consumers, in 2022 and beyond.”

Source
^{1,3} Nielsen, Total GB, Value MAT to 19.06.21
⁴ Nielsen, Total GB, Value Share MAT to 19.06.21
^{5,8} Nielsen, Total GB, Value MAT to 19.06.21



NO.5 BIGGEST IC SKU
IN TOTAL SOFT DRINKS



FASTEST SELLING
FLAVOURED ENERGY DRINKS



NO.1 ZERO SUGAR
ENERGY BRAND IN GB



MONSTER IS THE FASTEST GROWING ENERGY BRAND IN GB.

⚡ ADDING MORE GROWTH TO TOTAL
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MONSTER
ENERGY

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Crediton Dairy

Arctic Coffee plays it cool

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KEY BRANDS

Arctic Coffee
– Café Latte, 330ml & 1L
– Caramel Latte, 330ml & 1L
– Intenso, 330ml & 1L
White Chocolate, 330ml
– Skinny Latte, 330ml

Our number one priority at Arctic Coffee is delivering great-tasting iced coffee using high-quality ingredients: Rainforest Alliance Certified coffee beans and fresh Devonshire milk, a formula that delivers on taste and, in doing so ensures those essential consumer repeat purchase rates, says Jo Taylor, Arctic Coffee’s brand manager.

“We started 2021 with the launch of our triple shot Intenso iced coffee. Consumers love the smooth but strong coffee taste and super-strength caffeine hit without the bitterness that some stronger coffee varieties can have,” she says.

“Then came the ‘flavour of the summer’, Arctic Coffee White Chocolate. Our RTD iced coffee category first hit the shelves of Tesco in early July and was met with an incredible amount of excitement and interest from consumers, journalists, and social media influencers. Consumers are desperate to try the White Chocolate variant that has gained so much great coverage this summer. The sales have not disappointed and we expect White Chocolate to be more widely available in multiple retailers next year.

Outperforming the category

“Our core 18- to 35-year-old audience continues to support and choose Arctic Coffee due to its great taste and affordable price; we believe this is what has earned us the highest frequency rate within the iced coffee RTD category¹. Once again throughout 2021 Arctic Coffee has grown at a rate that significantly outperforms the category



“Our RTD iced coffee category first hit the shelves of Tesco in early July and was met with an incredible amount of excitement and interest”

growth² and we expect to continue to build on this impressive growth rate as we enter 2022.”

Full rebrand planned

Next year will see the full Arctic Coffee range in newly rebranded cartons, launched after extensive consumer research to ensure that the new designs retain all the Arctic branded elements consumers know and love, says Taylor.

“The brand identity is bolder, the colour variants are stronger, the polar bear is more energised and the coffee bean scale is now more prominent,” she says. “This design now perfectly complements the white biobased caps, a change from the previous black plastic ones that were used until 2020.

“The decision to move to biobased caps was largely an environmental move to eliminate black plastic from our range of cartons, which are already fully recyclable and have a lower carbon footprint than alternative packaging types,” explains Taylor. “Following consumer feedback and to make recycling easier, we’ve introduced clearer recycling instruction on the back of all of the new Arctic Coffee cartons.

“The iced coffee category continues to grow at an impressive pace and offers considerable opportunity for a brand like Arctic to do what it does best: deliver extremely delicious iced coffee at an affordable price.”

Source
¹ IRI and Kantar data, 52w/e 08.08.21
² Iced coffee category value +29% YOY (IRI data, 52 wks to 08.08.21) vs Arctic Coffee value +87% YOY (IRI data 52 wks to 11.07.21)

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* 87.7% average repurchase intent. Shopmium survey of 802 consumers – Sept 2021.

Fentimans

Full of botanical flavour

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Nigel Tarn
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KEY BRANDS

Fentimans

“Over the last year, Fentimans has seen phenomenal growth in our core range, as well as our mixers and more specialist flavours, which now sees us in the enviable position as the adult soft drinks brand with the biggest growth, according to the latest Nielsen figures¹, so we’re in a great place,” says Nigel Tarn, marketing manager at the company.

New botanicals on the horizon

“The year ahead is going to be about keeping an eye on what we do best, while being mindful and acutely aware of the high-fat, salt and sugar (HFSS) regulations coming over the hill,” he says. “We’ve been mindful of not only the regulations, but also consumer intent on living a healthier lifestyle, and therefore consuming drinks differently. In early 2022, we will be launching our new range of botanical beverages with a functional health benefit.”

Fentimans has been a part of the no & low alcohol sector for a while, as a preferred credible adult soft drink option with its core range of flavours, or with its recent World Beer Awards-winning Lemon Shandy, says Tarn. “So abstinence from alcohol doesn’t necessarily mean avoiding quality, flavour or enjoyment,” he notes.

“We’ve seen incredible growth in the traditional flavours we offer, such as Ginger Beer, Cherry Cola and Dandelion & Burdock, as well as a great following in more contemporary twists on classic flavours such as our Rose Lemonade or Orange Jigger, both of which we have just launched to a great reception in 4-packs within Sainsbury’s.



“Abstinence from alcohol doesn’t necessarily mean avoiding quality, flavour or enjoyment”

Sustainability to the fore

“All of our products come in recyclable glass bottles and cans, and sustainability has always been at the heart of our operations.

“The soft drinks sector seems in great health and we’re looking forward to seeing our innovative new range of botanical beverages with a functional health benefit hitting the shelves soon.”

In 2022, Fentimans will focus on bringing its botanically brewed beverages – soft drinks, premium tonics and flavoured mixers – to as many people as possible, through in-store and consumer sampling. It will align in-store with key collaborators from the world of artisanal and craft spirits to showcase the versatility of its drinks across multiple consumer occasions.

Source
¹ Nielsen, 11.09.21

The biggest growing premium soft drink*

ESTD



1905

Full of
botanical
flavour



*Nielson 52 w/e 11.09.21

Get More Vits

Healthy focus for rising brand

DETAILS

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KEY BRANDS

Get More Vits, 500ml PET
Get More Vits Multivits for Kids, 330ml PET
Get More Recovery Sports Drinks, 500ml PET
Get More Vits, 330ml Sleek Cans

Get More Vits makes a range of delicious and healthy drinks to help consumers and their families stay healthy at home and on-the-go, says owner and co-founder Steve Norris. This vision has been rather pertinent over the last year, as a focus on its ‘consumption at home’ business helped it be resilient during 2020. Meanwhile, its continued growth, alongside the return of its on-the-go trade, has ensured 2021 is already a record-breaking year for Get More Vits.

Last quarter was the company’s biggest ever since its 2013 launch, with growth surging north of 50% vs 2019¹ – itself a year that saw revenues grow by 50% vs 2018².

Taste remains at the heart of the Get More Vits’ range. Co-founders Chris Arrigoni and Steve Norris believe that, first and foremost, a soft drink must be refreshing and enjoyable, but also meet consumers’ developing health needs – and this has driven the brand’s recent NPD. Inspired by the stellar performance of its top-selling Get More Vit D – which contains the 10 micrograms of Vitamin D that Public Health England recommends consumers of all ages take daily – the team have developed Vitamin B12 and Fibre drinks.

“Delicious Pink Grapefruit Vitamin B12 provides the essential vitamin that vegetarians and vegans often lack, since its main source is animal produce – meat, fish and dairy,” it says.

Another first is Get More Vits’ Fibre drink, which contains 6g of dietary fibre per bottle. Average daily fibre consumption in the UK is 18g while the recommended amount is 30g, so this provides an easy way to keep levels topped up, it says. “Underpinned by natural fruit flavours, spring water and impactful packaging, the range offers the right amount of specific vitamins and explains to consumers why it’s good for them.”

The brand’s health credentials are set to be enhanced with a pipeline of NPD beyond soft drinks, launching into the market from Q4 2021, it adds. Comprising vitamin supplements, effervescent tablets, sprays and chewing gum, the Get More Vits Healthcare range



“Last quarter was the company’s biggest ever since its 2013 launch with growth surging north of 50% vs 2019¹”

complements the Get More Vits drinks and allows cross-category promotions, driving incremental sales and helping educate consumers on the benefits of staying healthy all year.

Earlier this year, the company completed an overhaul of its website. “With an emphasis on ease of use and attractive imagery, the fresh look and feel permeates Get More Vits’ social media platforms and advertising, and has driven further consumer interaction and positive feedback,” it says.

The Get More Vits team are passionate about the health of their consumers and this passion extends to the health of the planet, it says. The company now offers a growing range of products in sleek 330ml cans, and is switching to 30% recycled plastic in its bottles – with a move to 50% and ultimately 100% recycled plastic from 2022. It also has plans to improve the recyclability of its bottles using an environmentally friendly sleeve with less ink.

Source
^{1,2} Company revenue data, 01.01-18 to 30.09.21

The UK's Number 1 Selling Vitamin Drink*



Winner of Zenith's Innobev Award
2021 Best No/Low Sugar Drink

Winner of Zenith's Innobev Award
2020 Best Functional Drink

*AC Nielsen Total Coverage Value Sales 52 weeks to 25.09.21

For samples, please email hello@getmorevits.com

Grenade

Fuelling soft drinks innovation

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Grenade Protein Bars
Grenade Protein Shakes
Grenade Energy

While Grenade is a clear category leader within the protein bar sector¹, the energy drinks category is relatively new to the company and one where we see huge potential,” says Dan Broughton, general manager (drinks). “The sector is now worth more than £1.2bn in Great Britain (Nielsen), with functional energy drinks the fastest-growing category, worth £240m².

“Part of this phenomenal growth is due to the innovation bubbling away within the category, and more robust insights surrounding what consumers want, being turned off by drinks that contain too much sugar, and too many artificial ingredients³, he notes.

“Understanding what the purchase drivers are, earlier this year we launched Grenade Energy, our functional energy drink, to evolve the category from inside out. Not only is the entire range zero sugar, it’s also zero calorie and is free from preservatives and artificial colours, containing plant-based BCAAs (studied for their role in muscle recovery) and caffeine derived from coffee beans – not created artificially. Wherever possible, and without compromising on taste, we’ve ensured Grenade Energy comprises natural or plant-based ingredients. This marks a massive step-change for the category, enabling us to secure listings in Tesco, Spar, Holland & Barrett, Amazon and, recently, The Gym Group and Bannatyne’s.”

Having received more than 1,000 five-star reviews on Grenade.com, the success of the company’s functional energy drink is also in-part due to changing attitudes to health post-Covid, adds Broughton. “The public is thirstier than ever for healthier



“The public is thirstier than ever for healthier functional drinks that better enable them to reach their fitness goals”

functional drinks that better enable them to reach their fitness goals.”

Outside the energy drinks sector, studies also show that six in 10 consumers are now opting for healthier snacks⁴, just one of the reasons why Grenade has developed its Protein Shakes, he says. “They’re also low in sugar, with each 330ml bottle packed with 25g of satiating protein. This helps to support muscle repair for those working out, while also making it easier for dieters to stay in a deficit and feel full. At less than 211 calories, they are a viable, healthier alternative to traditional breakfast shakes or smoothies that source a lot of their calories from sugar.”

Recently, Grenade partnered with UK dance group Diversity for Grenade Energy’s launch, with energy-inspired routines and trending TikTok dances, he says. “This has helped to catapult awareness of Grenade’s products, with new lifestyle-centric shoppers hungry to see listings in key consumer channels.”



Source
¹ IRI Marketplace, Total UK Market Value Sales, L56 weeks to 08.08.21
² Nielsen Home, Total GB, 24 weeks to 08.08.20
³ Lightspeed/Mintel, Sports and Energy Drinks UK, April 2021
⁴ Mintel, Consumer Snacking UK, 2021

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HIGH PROTEIN
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ZERO CALORIES

iPRO

parkrun gains iPRO as partner

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KEY BRANDS

iPRO Hydrate

- Berry Mix
- Orange & Pineapple
- Citrus Blend
- Mango

iPRO – Sport Edition

- Berry Mix
- Orange & Pineapple
- Citrus Blend
- Mango

iPRO – Student Edition

- Berry Mix
- Sour Cherry
- Mango

iPRO has launched a new wellness range of drinks, iPRO Hydrate, backed by a new six-year global partnership with parkrun, the largest provider of free, community-led physical activity opportunities in the world, as its global hydration partner.

Nick Pearson, parkrun CEO, says: “We are very particular about the organisations we partner with. We have spent many months talking with iPRO and are really happy that iPRO’s and our values align. Healthy hydration is at the heart of wellbeing and activity, and we very much welcome iPRO into our growing community.”

In celebration of this landmark partnership, both iPRO and parkrun have collaborated on NPD for the entire iPRO range, launching early 2022, which features the community-wide recognised parkrun logo and the highly regarded endorsement of parkrun on the front of pack. “This NPD embodies our shared goal to support people’s wellbeing through promoting the benefits of a healthy lifestyle,” says Sophie Christy, global commercial director at iPRO. “parkrun chose iPRO as its global hydration partner as it recognises the important role hydration plays to help improve wellbeing across its network of parkrun communities.”

iPRO ranges

iPRO currently has three ranges to suit all ages and occasions: school-compliant range, iPRO – Student Edition; Informed Sport batch-tested range, iPRO – Sport Edition; and the new NHS CQUIN-compliant wellness range, iPRO Hydrate.

Healthy, functional drinks are poised to be big performers in 2022, notes Christy. “Before Covid-19 impacted the FMCG industry, consumers were already taking a conscious approach to health and wellness, resulting in an unprecedented demand for immunity-boosting beverages,” she says.

Global health drinks market

In 2019, the global health drinks market was valued at just over US\$478bn¹, with an expected CAGR of 6.06%¹. Now, enhanced waters are outpacing their



“Healthy hydration is at the heart of wellbeing and activity”



plain counterparts, with \$2.2bn sales and a 16.3% share of the category².

Sophie Christy adds: “Flavoured drinks made from natural spring water are now in high demand as they provide that burst of healthy hydration on-the-go. All-natural flavour and sweetener innovation will drive the category forward. We have spent many years perfecting a drinks range that is now widely recognised as one of the most loved healthier choice hydration drinks among consumers in over 30 countries worldwide. We are delighted to partner with parkrun across our shared goal to support people’s health and wellbeing through healthy lifestyles.

“The iPRO drinks range is sweetened with high-quality Stevia, with no caffeine, artificial colours or flavourings. Rather, they’re enriched with electrolytes, vitamins, and minerals, which are a powerhouse of replenishment for our wellbeing. We will be supporting parkrun in its mission to create a positive, welcoming and inclusive experience globally.”

parkrun is the largest NHS social prescribed activity in the UK, and iPRO’s NHS CQUIN approved low-sugar drinks offer healthy hydration with an ultra-refreshing sweet taste. The flagship range, iPRO Hydrate, is bursting with powerful antioxidant vitamin C and immunity-boosting B vitamins.

Source
¹ Infinium Global Research and Consulting Solutions
² SPINS

parkrun

iPRO
HYDRATE

GLOBAL
HYDRATION
PARTNER



NEW **parkrun** NPD AVAILABLE Q1 2022



ENRICHED WITH
VITAMINS &
MINERALS



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TASTING
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Princes Group

Jucee redesign meets trends

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KEY BRANDS

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 Princes
 Napolina
 Farrows
 Crosse & Blackwell
 Shippam's
 Vier Diamanten
 Trex

Jucee squash has recently been relaunched with a full re-design to showcase the brand's unique benefits within the squash category and highlight that it meets consumer demands for sustainable health-focused products with added value.

As part of the rebrand, Jucee held a series of consumer panels and research showed 97%¹ of respondents expressed a like of the new Jucee brand, with the key brand truths performing positively.

The new Jucee recipes have been upgraded, prioritising added-value benefits such as vitamins C & D, and taste – the most important element of the consumer experience. As part of this upgrade, Jucee has significantly improved the recipes of its best-selling flavours – Orange; Apple & Blackcurrant; Orange, Lemon & Pineapple; and Summer Fruits – to encourage repeat purchase and satisfy shopper needs, says soft drinks commercial director Joanna Watling.

The Jucee relaunch has also seen the brand transition all of its plastic squash bottles into 100% recycled PET, benefiting both the environment and consumers and ensuring the brand is positioned as a sustainable choice.

The rebrand comes at a time when just under half (48%) of global consumers believe companies are responsible for increasing the amount of packaging that is recycled, while only 25% believe the responsibility lies with consumers and just 20% with governments². Despite this, 54% of consumers also believe we (as a society) still have time to save the planet, and 51% think their own behaviour can make a positive difference to the environment², which is why the timely Jucee move into 100%



“The rebrand comes at a time when just under half of global consumers believe companies are responsible for increasing the amount of packaging that is recycled”

recycled plastic bottles is a key step-change. In addition, all elements of the newly launched bottle, including bottle, label and cap are 100% recyclable.

As part of the Jucee research, 74% of respondents confirmed the new Jucee brand was very appealing or appealing with both lapsed and non Jucee buyers scoring the changes made to both the design and bottle well, which demonstrated the brand is something they would consider purchasing³.

Jucee's new pack design highlights its benefits, featuring 'Made with Real Fruit' and 'Made from 100% Recycled Plastic' messaging, as well as 'with added vitamins C & D' and zero added sugar credentials on-pack.

Jucee is hugely popular, especially with families, with 8.8m litres of Jucee sold in the UK⁴, reveals Watling. The brand is bought by nearly 600k households⁵ and is worth £6.3m value sales in the UK⁶. “However we know our shoppers want to see Jucee in more UK stores, and our brand needs to appeal to a wider audience to have the strongest possible presence on-shelf,” she says. “Jucee's new rebrand, highlighting clear brand truths on the front of every pack, reflects what the consumer wants to see, as well as our unique position in the category for environmentally friendly and health-led products.”



Source
¹3 U&A study, 2020
² Mintel, October 2021
⁴6 IRI, EPOS data, 52 w/e 20.03.21
⁵ Kantar, WPO data, 52 w/e 21.03.21

Jucee

A CHANGE FOR THE BETTER!

WITH ADDED VITAMINS C & D**

ZERO ADDED SUGAR*



SCAN ME

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*Contains naturally occurring sugars
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WITH OUR NEW RECIPES WE'RE BETTER FOR YOU AND OUR NEW BOTTLES ARE BETTER FOR OUR ENVIRONMENT TOO!

EVERY BOTTLE IS MADE FROM 100% RECYCLED PLASTIC

Radnor Hills

Offering crisp, clean tastes

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KEY BRANDS

Radnor Hills
Radnor Hills Infusions

“We have had a really busy year at Radnor Hills,” reveals managing director William Watkins. “We have recently put in a new canning line and the two new products we brought to market were still and sparkling water in cans. This means that we are able to offer our water, taken from our spring on-site in Wales, in four different packaging formats, which gives the consumer maximum choice.

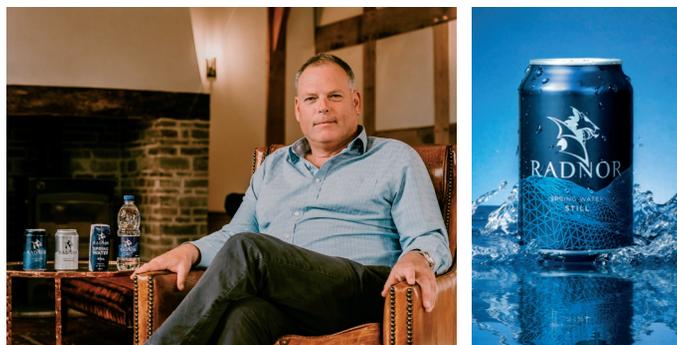
One of the key developments in soft drinks is that consumers are becoming less used to sweet drinks, which bodes very well for the emerging Radnor Infusions range, says Watkins. “With Infusions, we take our spring water and add extracts and natural flavours of fruit to develop a crisp, clean, sparkling fruity taste without any associated calories,” he says.

“To do this we have had to work carefully with different flavours as some work better than others in this format, but we have managed to get an exciting range of dual flavours, that are refreshing and memorable. They have been very well received.”

Sustainability moves

Radnor Hills is moving its range of plastic bottles to 30% recycled RPET at the end of the year, and has introduced cartons, cans and glass and invested heavily in these sectors to make sure that alternative packaging formats are available.

“We’ve developed our site into a zero-to-landfill location, meaning nothing leaves here for landfill,” adds Watkins. “We make sure that we meet



“We are able to offer our water, taken from our spring on-site in Wales, in four different packaging formats, which gives the consumer maximum choice”

the highest standards of ISO 14001 and we want to be ahead of the curve in terms of sustainability and leading the argument for both plastic and other packaging formats.

Brand support

“We have a really exciting range of support for our products, ranging from social media activity, geo-targeted adverts, on-pack promotions, in-store sampling as well as several trade and consumer events,” he says. “This means retailers can have full confidence in stocking our products and that the product will be well recognised and move quickly from their shelves. This is an ongoing campaign and doesn’t stop for us!

“Our brand stands out because it is a natural source of water, available in lots of formats, and we have added the simplest of ingredients to them to make a crisp, clean, balanced drink that is refreshing and delicious.”



INFUSIONS

When you're feeling just too fabulous for water



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All natural flavoured Welsh sparkling spring water

ZERO TO LANDFILL



INFINITELY RECYCLABLE



@radnor_infusions

Red Bull

Functionality spurs growth

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KEY BRANDS

Red Bull Energy Drink
Red Bull Sugarfree
Red Bull Zero
Red Bull Editions
Red Bull Sugarfree Editions

Today, the sports & energy drinks sector is worth £1.6bn, with growth totalling over £199.4m vs 2020¹, says Red Bull. This growth has been fuelled by the increasing demand for functional energy drinks, which have added over £183m vs 2020 and are now worth more than £1.1bn annually².

The consistent performance of functional in the category has ensured that sports & energy has remained in growth, despite a slower performance in other segments, and functional energy is the fastest-growing segment in sports & energy, up 21.9% YTD³, it says. The growth of Red Bull over the past year has been driven by an increase in frequency, with volume per buyer (packs) at 31.1 per year, up 28.2% YA⁴.

NPD

Flavoured options are increasingly popular and, due to a major increase in consumer demand and high trade success globally throughout the summer, the Cactus Fruit edition will become a permanent fixture within the Red Bull portfolio as of November 2021. This permanent addition to the brand's range is aimed at driving more flavours growth in the soft drinks category.

"Originally unveiled in March 2021 as a limited-edition offer for the summer, the latest fruit sensation delivers all of the functional benefits of Red Bull Energy Drink along with an invigorating burst of berry that blooms into an exotic fruit and violet flower taste," says the company.

As well as the trend towards flavours, consumers are increasingly picking up sugar-free alternatives, so the Red Bull portfolio has been enhanced to include a sugar-free variant of almost every pack in the range. This has clearly resonated with shoppers, it says, as, in the latest six months, Red Bull sold 21.5% more sugar-free volume through multipacks⁵ – with these variants also growing penetration by 37.4%⁶.

Bringing a reformulated Red Bull Zero back to the market last year has also driven brand growth. Selling more than 3.9m cans since its 2020 relaunch⁷, Red Bull Zero is one of the biggest NPD contributors of growth to the overall



“The consistent performance of functional in the category has ensured that sports & energy has remained in growth despite a slower performance in other segments”

sports & energy category, adding £3.4m of value as part of Red Bull's £79.7m MAT growth vs 2020⁸.

Brand stand-outs

"Red Bull Energy Drink 250ml is our most familiar and best-selling SKU, but it's also the number one single-serve soft drink in the UK, worth over £147m⁹," says the company. "With the second-largest absolute gain on any brand, Red Bull has grown by £79.7m¹⁰. This is down to an increase in penetration, as well as the power of its iconic rhombus packaging as a category signpost, which most consumers look for on-shelf. Red Bull has gained 95% more shoppers through in-home channels over the last year and 79% more shoppers through out-of-home channels¹¹.

"Ideal for a range of occasions, Red Bull Energy Drink 250ml is the perfect pack size for functional energy consumption, and contains the same amount of sugar as a glass of apple juice and the same amount of caffeine as a cup of coffee," it adds. "Despite reduced shopper missions in the last 18 months, Red Bull has continued to resonate with consumers with single formats still in growth of 20.8% YTD¹²."



Source
^{1,2} Nielsen Scantrack, Value Sales, 52 w/e 28.08.21
³ Nielsen, Value Sales YTD vs YA to w/e 28.08.21
⁴ Kantar, combined panel/ Shopper Drivers, 52 w/e 13.06.21
⁵ Nielsen, Volume sales, latest 52 weeks to 28.08.21
⁶ Kantar, combined panel/ penetration, 52 w/e 18.04.21 vs YA
⁷ Nielsen, Units, MAT 2020 w/e 28.08.21
⁸ Nielsen, Value Sales, MAT 2020 w/e 28.08.21 vs YA
⁹ Nielsen, Value Sales MAT w/e 28.08.21
¹⁰ Nielsen, Value Sales, MAT 2020 w/e 28.08.21 vs YA
¹¹ Kantar, Take-Home/Out-of-Home Panel, Product Gains Loss to w/e 13.06.21
¹² Nielsen, Value Sales YTD vs YA w/e 28.08.21

MORE CHOICES. MORE SALES.



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Red Star Brands

Extending kombucha's appeal

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KEY BRANDS

The GUTsy Captain
Four Loko
Master of Mixes
Sparkling Ice

As the leading kombucha brand in Europe, The Gutsy Captain, has been instrumental in driving growth for the category, now at 27% year-on-year¹, says Red Star Brands.

No longer considered a niche category, consumers now purchase kombucha as an alternative to carbonated soft drinks and recognise the functional benefits of a drink that promotes good gut health.

Building strong brand loyalty is key to establishing The Gutsy Captain in the UK market, emulating what the brand has achieved in Europe. During a recent study of over 100 consumers conducted in Spain and Portugal, following consumption of The Gutsy Captain, 71.2% of consumers said they felt an improvement in gut health and 74% claimed an improvement in overall wellbeing, while over 95% rated taste as good or excellent². In fact 99% of the brand's Portuguese consumers would recommend it to a friend or family².

Passionate about combining great taste, functional benefits and educating consumers about the benefits of kombucha, chief marketing officer Inês Freitas says the brand's vision is to make the drink accessible to even more consumers. With the help of innovative NPD in the form of its latest Zero launch, the brand answers a key consumer need – kombucha with no sugar or calories. According to Freitas, the new range “broadens the appeal of the category and widens The Gutsy Captain's appeal with consumers, so they reach for kombucha intuitively”.

The new Zero range remains 100% kombucha. While it has a longer fermentation period to leave no sugar at the end, it is created in the same traditional and authentic way as the existing core range, using a SCOBY – a



“No longer considered a niche category, consumers now purchase kombucha as an alternative to carbonated soft drinks and recognise the functional benefits of a drink that promotes good gut health”

symbiotic culture of bacteria and yeast – which produces the The Gutsy Captain taste consumers love, says Freitas.

Launched in selected UK retailers this year, including Holland & Barrett and Amazon, the Zero range includes six flavours – Original, Ginger & Lemon, Pomegranate, Watermelon & Mint, Passionfruit and Raspberry – which is the fastest-selling core kombucha SKU in supermarkets according to data¹. The range offers three different pack formats to suit all consumption occasions: a 250ml can; and 400ml and 1L PET bottles. The Gutsy Captain's 400ml SKUs are now made using PET with 30% recycled content. There is a commitment to transition to PET with 50% recycled content by the end of this year, and an ambition to exceed this by the end of 2022.

Educating consumers about gut health and the functionality of kombucha remains a key objective for the brand says Freitas. To do this, it utilises social media and collaborates with online fitness partners and ambassadors to build credibility and authenticity, using its in-house nutritionist to raise awareness of its role in a healthy diet.

The Zero drink recently won accolades for ‘Best Functional Drink’ at The World Beverage Innovation Awards, while the Passionfruit flavour won ‘Best Gut Health’ product at Holland & Barrett's Healthy Awards 2021.



Source

¹ IRI UK Marketplace, data to July 2021
² Survey of 100 GC consumers, 2021

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Refresco Drinks UK

Nobody does ginger like us

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Joe Major
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KEY BRANDS

Old Jamaica Ginger Beer
– Regular, light and extra fiery, available in a variety of formats: 330ml, 500ml, 1.5L and 2L
Old Jamaica Sodas
– New-look fruity flavours, Tropical, Cream Soda, Grape and Pineapple, available in 330ml format and Tropical 2L
Old Jamaica Ginger Ale
– New Ginger Ales, available in Original and Rhubarb 1L format

Old Jamaica is launching a collection of trendy flavoured ginger ales that have been specifically designed to pair with a range of different spirits, reveals Refresco Drinks UK.

“As consumers become more adventurous and seek out new and interesting flavour combinations, rum is hotly-tipped to follow gin’s impressive rise and is currently experiencing 3% volume growth year-on-year¹, with one in 10 (10%) consumers now drinking it out of home – equating to around five million consumers¹,” says the company. “This growth has been largely driven by golden and spiced brands.”

A different mixer proposition

The flavour-seeking of gin consumers, paired with the versatility of rum positioned for growth, requires an entirely different mixer proposition, one that meets the darker spirits as well as gin and vodka, it says. “Ginger ale is a great alternative to tonic as it offers a different layer of flavour to classic serves.

“And let’s not forget whisky, the most traditional spirit to mix with ginger ale. Whisky faces exciting times ahead as strides are being made to make the category more accessible for all to discover, bringing new drinkers into play.”

Donna McKay, senior category and innovation manager at Refresco, says: “As a future-facing brand, we have recognised that the lines between the soft drinks and mixer categories are becoming increasingly blurred and are showing similar trends and influences.”

Consumers are thirsty for change and Old Jamaica brings something different to the mixer category, she adds.

“Shoppers want to see exciting options and innovation from a brand they recognise and trust, like Old Jamaica, which has been established since 1988 and is the UK’s No.1 ginger beer brand². This is already used as a mixer by one in four consumers in the UK and is much loved by bartenders³.”

Consumers are increasingly looking for ways to add interest and excitement



“Ginger ale is a great alternative to tonic as it offers a different layer of flavour to classic serves”

to their drinks repertoire and are fatigued by the same category choices, she notes. “At Old Jamaica, we have recognised the need for versatility in drinks creations and are launching a range of Ginger Ales in two flavours: Original and Rhubarb. We are delighted to offer our Ginger Ales Collection at a time when data shows dark spirits are growing in preference, yet they need a mixer to catapult growth, bringing new consumers into the category.

“Both ginger ales and sodas have seen a resurgence as consumers look beyond the gin & tonic trend and require a versatile mixer that offers flavoursome and exciting drinks creation. Our Ginger Ale Collection does just that, answering consumer needs for great tasting drinks, suitable for all occasions.”

“So, upgrade your mixer and try Old Jamaica’s brand-new range of Ginger Ales,” says McKay. “After all, nobody does ginger like us.”

Source

¹ CGA Mixed Drinks, Q3, 2020

² IRI Total Market (excl Discounters), Carbonates, Mixers & Adult Soft Drinks, Flavour, Volume, MAT to 52 w/e 05.09.21

³ CGA On Premise Measurement Tool, October 2019

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Old
Jamaica

Remedy Drinks UK

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Ian Hadley
Head of Sales, UK

KEY PRODUCTS

Remedy Kombucha
Remedy Coconut
Water Kefir
Remedy Switchel

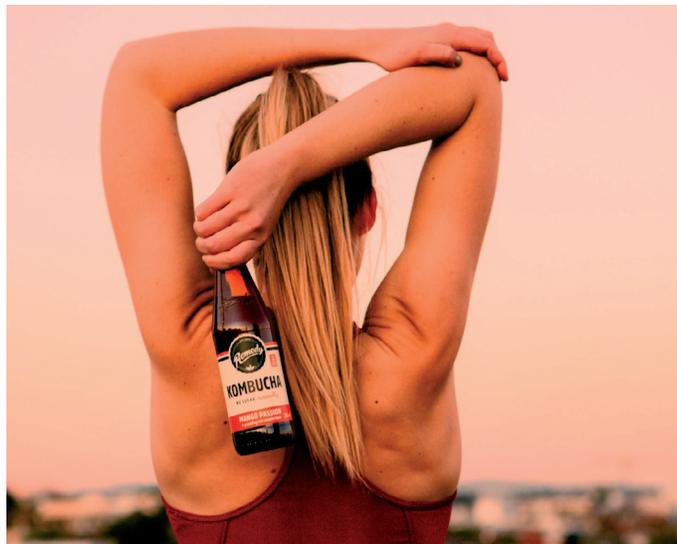
➔ Kombucha has taken the global soft drinks category by storm in recent years, as this live-cultured drink taps into the increasing awareness of the importance of gut health, says Remedy Drinks UK. Research carried out recently by Stanford University revealed that “foods like yogurt, kimchi, sauerkraut and kombucha increased the diversity of gut microbes and led to lower levels of inflammation”¹.

As an adult soft drink that contains zero sugar and which offers the depth and complexity of flavour that comes from a long-age fermentation process, it appeals to those looking to cut down on artificial sweeteners and sugar in favour of natural, unprocessed products. Additionally, around 20% of kombucha is consumed in the evening, as it taps into the growing trend for a more mindful approach to drinking.

In the UK, category penetration has doubled year-on-year, with take-home sales growing 92% over the past year alone². Yet, relative to other more developed markets like the US and Australia, there is still significant room for growth. If the UK category was the same size as the Australian one on a per capita basis, for example, Remedy estimates it would be worth £328m.

As the UK’s biggest kombucha brand³, Remedy is leading the way in driving awareness and trial of kombucha, says UK general manager Anna Dominey. “Remedy was born to shake the fizzy drinks industry up for good and to put something genuinely healthy out into the world,” she says. “Remedy founders, Sarah and Emmet, started brewing kombucha for their family at home in their kitchen in Melbourne. They loved how this traditionally fermented drink tasted, and how it made them feel. This got them focused on the drinks that were available on supermarket shelves and which claimed to be healthy but really weren’t, and they saw this as an opportunity to make it right.”

Remedy’s drinks are always live, raw and unpasteurised, and contain zero sugar – which means that they can be easily stored in or out of the fridge. “Many kombucha producers have found it a challenge to brew at



“Forecasts suggest the UK kombucha market will hit £250m in the next five years”³

scale, but Remedy has created a range that consistently delivers great taste,” explains Dominey. “Our consumers tell us that this – together with potential health benefits, through live cultures, tea, polyphenols and organic acids – is why they return time and again, even when they’ve thought initially that kombucha wasn’t a drink for them.”

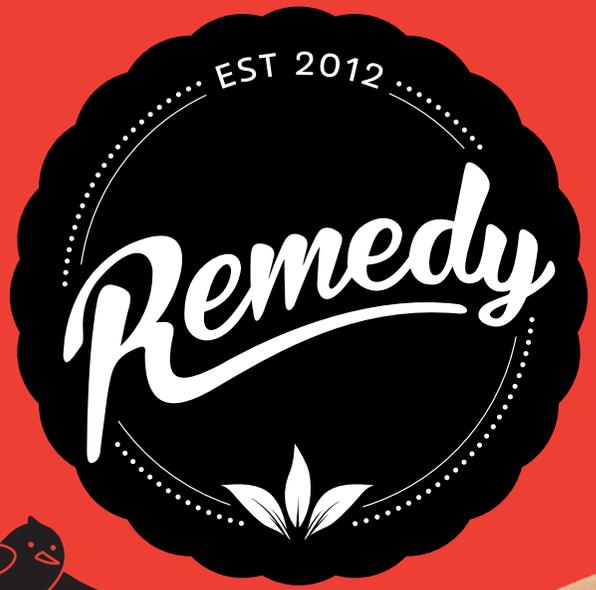
Remedy has a wide range of pack formats, with two available for on-the-go: 250ml cans and 330ml glass bottles. These are now sold in a wide variety of channels and retailers. Key flavours include: Raspberry Lemonade, Ginger Lemon, Cherry Plum, Peach and its newest arrival, Mango Passion.

Remedy has also developed multi-serve formats – a 4x330ml multipack and 700ml bottles – for consumers looking to drink kombucha in-home.

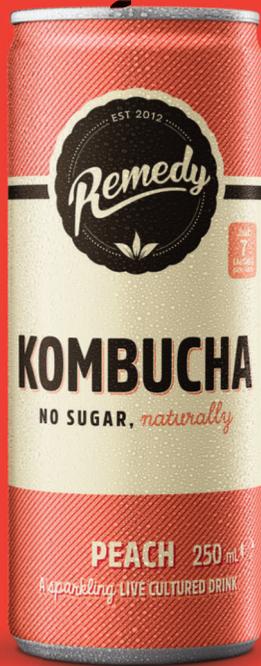
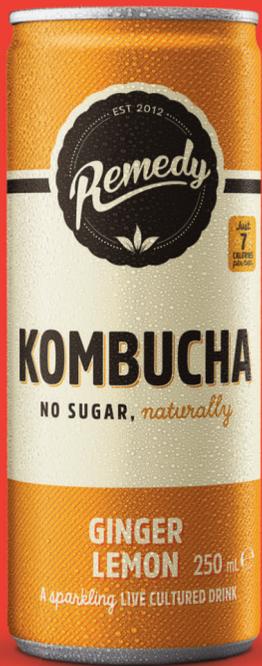
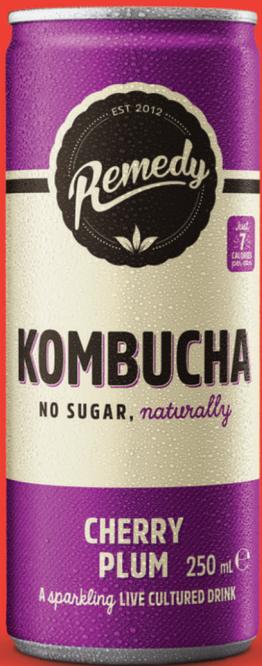
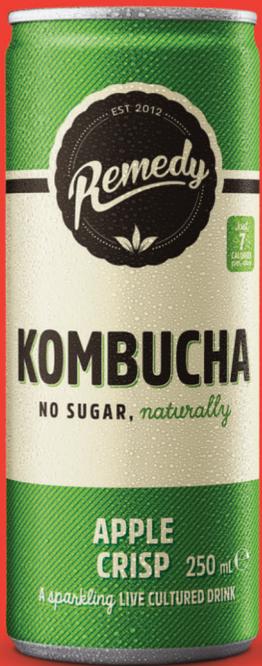
Dominey says: “Stay tuned for NPD in 2022, including further pack format developments and exciting new flavours to come for the Remedy range in the UK.”

Source
¹ <https://www.nytimes.com/2021/08/13/well/eat/yogurt-kimchi-kombucha-microbiome.html>
² Kantar, 52 w/e 08.08.21
³ NielsenIQ, 52 w/e 11.09.21

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*Source: Nielsen IQ 52 w/e 11 September 2021

SHS Drinks

Shloer launches single serves

DETAILS

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Shloer, the popular premium soft drink known for its 750ml sharing bottles, has expanded its range by introducing new single-serve pack formats. Presented in the brand's two most popular flavours – White Grape and Red Grape – 4 x 275ml multipacks of the sparkling fruit drink debuted on-shelf in October.

Sarah Lawson, head of marketing – softs at SHS Drinks, says: “In line with all Shloer products, the 4 x 275ml flavours are made with real fruit juice and sold only in recyclable glass bottles. Shloer products contain no artificial colours, flavours or preservatives; they are also gluten-free, vegetarian, vegan-friendly, and halal-certified* – all of which help to support the brand's enduring popularity. With a £2.60 RRP, the 4-pack format will drive new usage occasions and further broaden consumer appeal.

“Shloer pioneered the acceptance of adult soft drinks (ASD) as ‘grown-up’ options in place of alcohol. Introducing 4-packs allows the brand to tap into increasing consumer preferences for ‘no & low’ choices and trends towards more moderate alcohol consumption. The convenient single-serves can be enjoyed both as everyday treats at home and at social gatherings.”

Multipacks are the fastest-growing format in the ASD category¹ and the launch will unlock a wide range of new usage possibilities for Shloer, notes Lawson. SHS Drinks' research shows that stocking a range of different-sized pack formats boosts overall brand sales².

Shloer's new 4-packs are being supported with an ongoing consumer



“Taking our two best-selling Shloer flavours into the single-serve arena marks a watershed moment for the brand”

programme comprising: shopper marketing activation (coupons and digital media); a targeted social media campaign; activity with social media influencers to build engagement; and a PR campaign in the national press.

Lawson continues: “With Shloer currently accounting for two of the top three ASD sharing bottle SKUs in grocery³, our new single-serve multipacks will build on this strong position and benefit from the increased prevalence of consumers deciding to entertain and dine at home. Shloer is the No.1 ASD at Christmas⁴ and comes into its own over the festive season as families and friends get together. Not everyone wants alcohol at social events and Shloer is the perfect premium soft drink substitute: special enough to not look out of place on the dining table yet accessible and fun, appealing to all.”

Perfect for both formal and informal occasions, the Shloer 750ml bottle range comprises Red, White and Rosé variants, mixed fruit flavours, a choice of ‘Light’ alternatives, plus Shloer Pink Bubbly for cork-popping celebrations.

“We know 50% of ASD occasions are linked to individual consumption⁵, so our new single-serve multipacks will give shoppers additional flexibility and choice, and deliver incremental sales for stockists,” notes Lawson. “Shloer is much loved by consumers and taking our two best-selling flavours into the single-serve arena marks a watershed moment for the brand.”



Source

¹ Nielsen, Total UK Take Home ASD category, value (£) sales MAT 11.09.21, +£9.1m year-on-year growth (+18%),

² WD Research, 2019

³ Nielsen, UK Take Home Mults ASD category, value (£) sales MAT 11.09.21. (Shloer 750ml: White Grape, Red Grape)

⁴ Nielsen, Total UK Take Home ASD category, unit sales 6 w/e 02.01.21

* All variants are halal-certified, except Shloer Pink Bubbly

Four times the fun, four times the sparkle!

NEW Shloer 4-packs



No.1 Adult Soft
Drink Brand at
Christmas*

Multipacks
are fastest-
growing format
in ASD
category**

Shloer
White & Red
Grape are 2 of
top 3 ASD
sharing bottles
in Grocery***

Sources: *Nielsen Total Coverage, Unit Sales (8 weeks to 02.01.21)

** +£9.1m year on year growth (+18%), Nielsen Total Coverage ASD category, Value (£) sales MAT 11.09.21

*** Nielsen Grocery Multiples ASD category, Value (£) sales MAT 11.09.21 (Shloer 750ml; White Grape, Red Grape)

Starbucks Ready-to-drink

Seeing chilled coffee success

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KEY BRANDS

Starbucks RTD

↙ The chilled coffee category has been particularly resilient throughout the recent pandemic, over-indexing in its retail channel presence, says Adam Hacking, head of beverages at Arla. In fact, chilled coffee continues to drive category growth and is now worth a value of £197.4m¹, up 29.9% MAT².

Why Starbucks?

As a category leader, Starbucks Iced Coffee has seen a clear increase in its market share, with consumers appearing to revert to brands they know and value, he says. As the largest iced coffee brand³, Starbucks is worth a value of £98.4m⁴ MAT and experiencing a growth of 32.4%⁵, reveals Hacking. “It is no surprise then, that it is also responsible for almost half of all segment sales (49.8% MAT)⁶,” he notes. “Plus, with sales increasing by £24.1m⁷ over the last year, Starbucks has added more incremental value than all other iced coffee brands combined across all time measures throughout this time⁸. This makes it one of the wider soft drinks category’s most successful brands. Instantly recognisable, the Siren is synonymous with quality coffee and is an important call-out for consumers looking to try the Starbucks ready-to-drink (RTD) range.”

This range now features Almond Plant-Based Iced Coffee, Coconut Cocoa Cappuccino and Oat Vanilla Macchiato, as well as its most intense Doubleshot™ yet: Doubleshot™ Intenso Black and Doubleshot™ Intenso Dark with a splash of milk.

The category’s future

Consumption habits have changed notably over the past 18 months, says



“Instantly recognisable, the Siren is synonymous with quality coffee and is an important call-out for consumers looking to try the Starbucks ready-to-drink range”

Hacking. “Even though fewer shoppers were picking up drinks for on-the-go initially, they have now begun buying into the category more frequently and in larger volume, with in-home consumption growing and 1,188,000 more shoppers buying into the category over the last year⁹, which is up 30% year-on-year¹⁰.”

“This shift is something that is likely to continue as hybrid working remains,” comments Hacking. “Previously, iced coffee was predominantly enjoyed in an RTD format, but as it becomes more established and its household penetration continues to grow, it’s expected that consumer consumption habits will align to the total soft drinks category.”

Alternative diets are also in growth, with more shoppers looking for dairy-free options. This has seen free-from drinks grow at 17.3% YOY¹¹, he notes. “Starbucks is aware of consumers’ changing preferences, which have contributed towards its overall success in recent years, and continue to be a key focus for the brand, as it introduces innovation to maximise the growing demand for plant-based options, as well as the need for an increased caffeine hit to get through intense days.”



Source
¹⁻⁸ Nielsen, Total Coverage MAT to 11.09.21
⁹⁻¹⁰ Kantar, Total Dairy Drinks, Coffee Buyers, 52 w/e 03.10.21
¹¹ Nielsen, Total Coverage MAT to 11.09.21

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coffee

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*Nielsen 11/09/21

Suntory Beverage & Food GB&I

Harnessing innovation

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 Sales Director GB

KEY BRANDS

Lucozade Alert
Lucozade Energy
Lucozade Sport
Ribena
Orangina

➔ Suntory Beverage & Food GB&I is passionate about innovating its products to make things work better in retail, says Alpesh Mistry, sales director GB. “By collaborating closely with large multiples, independent retailers, wholesalers and suppliers, we can harness our collective scale to meet changing shopper needs,” he says.

Brand innovation

“During the disruption caused by Covid-19, we adapted quickly for retail and the end-customer in an unpredictable landscape,” says Mistry. “Investment in new products and formats ensured we helped give consumers the drinks they needed, in the right pack, in the right format, for the right occasion, as lifestyles changed.

This investment in innovation has continued with its latest launch, Lucozade Alert, which contains naturally-sourced caffeine and vitamin B3, helping to reduce tiredness without compromising on the great Lucozade taste, he notes. “From a megabrand that customers trust, Lucozade Alert brings something bold and new to the stimulation drinks category, which is the fastest-growing soft drinks segment in recent years¹. The new Lucozade Alert range responds to a clear consumer need for a stimulation drink which tastes great, is low-calorie and more relevant to a wider audience.”

Available in 500ml PMP and non-PMP cans, Lucozade Alert should be displayed within retailers’ current stimulation category in the chiller, away from Lucozade Energy, as it caters to a different consumption need, he says.

Earlier this year, the company also launched Lucozade Energy Raspberry Ripple, tapping into a demand for new flavours and building on the success of the Lucozade Energy flavours range. Contributing a significant £60.7m² worth of sales, Raspberry Ripple has already brought £700k³ to the segment since its launch in March.

Health & wellbeing

Since 2016, Suntory has removed more than 50% of sugar from its core range, so retailers and wholesalers of



“The Lucozade Alert range brings something bold and new to the stimulation drinks category, which is the fastest-growing soft drinks segment in recent years¹”

all shapes and sizes can be confident knowing that the majority of its soft drinks will not be subject to the new restrictions of HFSS, notes Mistry.

“We have seen a long-term trend towards drinks with lower sugar as consumers are becoming more aware of their health and wellbeing. Diet continues to outperform regular soft drinks, with a 63% volume share of total soft drinks⁴ and our Lucozade Zero range therefore presents a great retail opportunity.

“Our latest innovation, Lucozade Alert is also non-HFSS, which makes it even more relevant to those shoppers looking for a stimulation drink that tastes great and is low in calories.

“Lucozade Alert is the latest example of how SBF GB&I is adding value by bringing large-scale innovation to the category. We remain committed to providing consumers with a choice of great-tasting drinks that respond to their demand for lower-sugar options.”

Source

¹ IRI Total Market, 52 w/e 28th March 2021
² IRI Marketplace GB, Lucozade Energy Flavours (excluding Original and Orange), value sales, 52 w/e 22.11.20
³ EXT IRI Marketplace, Value, Latest 52-week data ending 27.06.21
⁴ Kantar Worldpanel, data to 52 w/e 27.12.20

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