

# Soft drinks



Nichols

# Fresh thinking for drinking

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 Nichols, the international soft drinks business and home of the iconic Vimto brand, is celebrating its biggest-ever year of innovation and activation spend, to drive consumer engagement and unlock growth for the soft drinks category.

“With external volatility becoming the ‘new normal’, shoppers are more considered than ever before,” says marketing director Angela Reay. “Brand equity plays a key role in driving growth through both core product range and innovation. Established, well-loved brands are particularly powerful in soft drinks, contributing more than own-label, and outperforming other categories<sup>1</sup>.”

**Love the taste**

While consumer footfall data reveals confidence is returning<sup>2</sup>, cautious spending remains a defining theme in 2024, though the soft drinks industry remains resilient<sup>3</sup>, says Reay. “This year’s ‘Love The Taste’ promotion celebrates the unmistakable taste of Vimto while appealing to more budget-conscious shoppers,” she notes. “The £3m campaign, activated across 23m bottles and cans, aimed to drive the core range while supporting new launches. The risk-free ‘Love the taste, or your money back!’ promise was pivotal in increasing brand engagement and helped attract 16% more shoppers to Vimto<sup>4</sup>.”

**Elevating enjoyment**

Newness remains critical to driving incremental value – worth £53m to the category over the past year – and growth contribution of 8%<sup>5</sup>. “Treating has remained buoyant, with consumers looking for a daily dose of happiness to take their minds off everyday stressors,” explains Reay. “Attention-grabbing flavours influence purchasing decisions for 59% of UK carbonates consumers, while Gen Z’s desire to experiment has led them to buy seven more soft drinks brands than the average shopper<sup>6</sup>.”

The launch of Vimto Discovery, a carbonates sub-brand combining familiar fruits with exotic ingredients



“Vimto is now worth £120m – its highest-ever value<sup>11</sup>. Vimto Energy and Vimto Discovery have contributed to 42% of brand growth over the past year<sup>12</sup>”

like ‘Mango & Dragonfruit’ and ‘Passionfruit & Lychee’ meets demand for adventurous flavours. “‘Discovery’ speaks to teens exploring new flavour combinations in pursuit of low-risk fun and enjoyment,” she says.”

Nichols also tapped into the nostalgia trend with the launch of another distinctive Slush Puppie Fizzie flavour – Green Apple, catering to the 65% of Britons who enjoy products that remind them of the past, and the continued desire to recreate traditional out-of-home experiences at home<sup>7</sup>, she adds.

**Enhancing body and mind**

“Consumers increasingly seek drinks that offer more than just flavour, with a focus on proactively enhancing body and mind,” notes Reay. Energy remains the biggest category winner, growing by +9.7% in the past year<sup>8</sup>.

Building on the success of Vimto Energy, Nichols has introduced Levi Roots Energy, blending real fruit juice, natural caffeine, and B6/B12 vitamins. The low-sugar range is mixed with trending herbs and spices, to create ‘Caribbean Crush with a hint of ginger’ and ‘Jamaican Sunset with a pinch of chilli’. Flavour innovation is driving growth in energy drinks<sup>9</sup>, while ‘permissible energy’—with health-conscious ingredients—is growing 10% faster than the total energy sector<sup>10</sup>

“Looking ahead, brands that focus on bold innovations, health benefits, and overall value will succeed in this dynamic category,” concludes Reay.



Source

<sup>1</sup> NielsenIQ Homescan Total GB 52 w/e 31.12.23 vs year ago  
<sup>2</sup> GfK Consumer Confidence Barometer powered by NIM (August 2024)  
<sup>3</sup> NielsenIQ RMS data for the Total Soft Drinks category, MAT to 10.08.24 for the GB Total Coverage market: total Soft Drinks growing +6.6%, Additional spend of +£823m YOY  
<sup>4</sup> Kantar WorldPanelOnline, Total Coverage, Total Vimto, 2024, Q2 vs Q1  
<sup>5</sup> NielsenIQ RMS data for the Total Soft Drinks category, MAT to 10.08.24 for the GB Total Coverage market: contributing to 8% of value growth to the category  
<sup>6</sup> Kantar FMCG, Spend %, 52 w/e 09.06.24  
<sup>7</sup> Mintel, February 2024; Carbonated Soft Drinks, UK, 2024  
<sup>8</sup> NielsenIQ RMS data for the Energy Category, MAT ending 10.08.24 for the GB Total Coverage market: energy growing +10%, up +£197m YOY  
<sup>9</sup> NielsenIQ RMS data for the Energy Category, MAT ending 10.08.24 for the GB Total Coverage market: flavours in energy growing +15% YOY  
<sup>10</sup> NielsenIQ RMS data for the Energy Category, MAT ending 10.08.24 for the GB Total Coverage market: growing +10% points faster  
<sup>11</sup> Kantar Beverages Brand Footprint (GB Take-Home Panel), 52 w/e 24.12.23  
<sup>12</sup> NielsenIQ RMS data for the Squash, Flavoured Carbonates, RTD Stills, Flavoured Water, and Energy categories MAT 10.08.24 for the GB Total Coverage market

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## Analysis

# Trading on the latest trends

The diverse soft drinks category continues to show resilience, constantly adapting and expanding in response to trending consumer demands

While hydration continues to be the leading driver for most soft drinks purchases in the UK – and carbonates continue to lead the retail market – the increasing focus on health and wellbeing, particularly among the younger generation is driving the demand for energy, protein, vitamin- and probiotic-enhanced drinks, healthy juices and smoothies, and CBD.

This increasingly diverse category is giving retailers a challenge as to how to present these in-store, so as not to confuse consumers, but still satisfy all their needs. And the category's sheer buoyancy and willingness to adapt is helping its continued growth despite the recent cost-of-living crisis.

According to Rob Yeomans, VP commercial development at CCEP GB, the soft drinks market in GB is now worth more than £20bn and has been

on a strong growth trajectory for some time, rising in value by 24% over the past five years<sup>1</sup>. “The category has been able to maintain growth because of its broad appeal for so many occasions, whether that’s an on-the-go pick-me-up or an accompaniment for social occasions at home,” he says. “Colas remain the largest soft drinks segment in retail, with almost two-thirds (64.2%) of their sales value generated by the Coca-Cola portfolio<sup>2</sup>. Also, the incredible growth of the energy category has continued so far in 2024, with sales surpassing the £2bn mark following an 11.4% increase in value<sup>3</sup>. Meanwhile, flavoured carbonates are worth more than £1.2bn<sup>4</sup> in GB retail.”

Despite cautious spending being a defining theme in 2024, the soft drinks market has shown real resilience<sup>5</sup>, says Nichols marketing director

Angela Reay. “The total soft drinks category has grown in value by +6.6%, with volume up +1.5%<sup>6</sup>,” she says. “Consumer demand for moderation has fuelled growth in the no- and low-alcohol category, with £0.4bn spend shifted to soft drinks over the last three years<sup>7</sup>. Newness within the category has been key, adding £53m in incremental value and contributing 8% of total category growth<sup>8</sup>. Our focus has been on evolving our portfolio to meet consumer needs and trends.

“Energy drinks remain the clear category winner, growing by £197m in the past 12 months<sup>9</sup>,” she adds. “With a third of UK households purchasing energy drinks<sup>10</sup>, further growth is highly anticipated, especially for more permissible energy drinks as consumers increasingly look for added functionality of health benefits.”



**£20bn+**

**Value of the soft drinks market in GB<sup>1</sup>**

*Nielsen*

**+£197m**

**Growth in value of the energy category in the last 12 months<sup>9</sup>**

*NielsenIQ*

**£38m**

**Value of the functional shots markets<sup>i</sup>**

*Circana*

**£48.2m**

**Value of the coconut water category in the past 52 weeks<sup>28</sup>**

*Circana*

Resilience is also the word used by Britvic GB commercial director Ben Parker to describe the soft drinks category's performance last year, with value sales growth up +4.6% across all channels, and +6.1% across grocery in particular<sup>11</sup>, he says. "The category continues to show growth, with the sub-categories seeing the biggest upsides across the trade in the past year, as shoppers look for sports drinks, glucose stimulant drinks and non-fruit carbonates. Meanwhile, the fruit carbonates sub-category showed strong value growth in line with total soft drinks, with an increase of +5.7%<sup>12</sup>, showing there is a continued desire for exciting and refreshing flavours<sup>13</sup>.

"In addition, while energy drinks haven't made their way into every household<sup>14</sup>, energy drink enthusiasts contribute a significant 85% of

all sales<sup>15</sup>," he adds. "Sugar-free stimulants are continuing to drive the market, growing at +8.8% vs standard stimulants at 10.3%<sup>16</sup>."

Suntory Beverage & Food GB&I sales director Alpesh Mistry expresses confidence that opportunities within soft drinks are vast. "We recently released some research that looks at the last 10 years of soft drinks sales and reveals the true effect of Covid-19 and how this feeds into the category for the future," he says. "The outlook is bright: soft drinks sales are growing faster now than they were pre-pandemic<sup>17</sup>. The energy segment, in particular, continues to deliver significant value for retailers and is currently experiencing 12.8% year-on-year (YOY) growth<sup>18</sup> across grocery mults," he says.

Meanwhile, fruit juice is currently worth over £1.1bn in the UK<sup>19</sup> and is

one of the fastest growing sub-sectors within soft drinks<sup>20</sup>, as consumers continue to seek out great tasting, healthier drink options, says Purity Soft Drinks CEO Sarah Baldwin. "The demand for healthier soft drinks, which emerged as a post-pandemic trend, has shown no sign of slowing throughout 2024. Consumers want more from their soft drinks, whether it's functional drinks promising mood-enhancing benefits or natural juice.

"When choosing a soft drink, health is now the second most important consideration after taste, with 41% of juice drinkers choosing a product because of its health credentials and 36% preferring products that provide one of their five-a-day<sup>21</sup>."

The total softs market continues to thrive, now worth £1.4bn (+6.2%/+£87.1m)<sup>22</sup>, says Franklin & Sons

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brand manager Lauren Edwards. “The ‘premium softs’ category, in which Franklin & Sons sits, is now worth £100.9m, up +1.8% in the past 12 months<sup>23</sup>,” she reveals. “One of the key growth drivers is the consumer shift towards reducing alcohol consumption, both at home and when out in bars. Customers are increasingly searching for premium, flavoursome non-alcoholic drink options, which still feel interesting and exciting, all of which has contributed towards a strong performance over the past 12 months.”

At Boost Drinks, commercial director Adrian Hipkiss says the UK sports and energy drinks market increased to an estimated £3.4bn in 2024<sup>24</sup> and there is ample opportunity to continue to innovate and diversify product offerings and formats. “Despite the challenges of the past three years impacting the sports drinks sector, there has not only been a return to pre-pandemic normality, but a rapid rate of sale, with a +74%<sup>25</sup> growth in the sports category in the last three years,” he says. “With Gen Z and future consumers Generation Alpha shifting towards a more health-conscious approach to dietary choices, sports and energy drinks have followed suit and are now offering a wider range of low- or no-sugar options.”

For total adult soft drinks, meanwhile, Belvoir Farm managing director Pev Manners says these have grown by 1.9% YOY<sup>26</sup> driven by price. “Penetration has declined across adult soft drinks and cordials,” he adds. “However, branded cordials are seeing a more positive picture in terms of frequency and volume per trip as people buy more, more often.”

Healthier and cleaner premium soft drinks have had an interesting year, agrees Dalston’s Soda founder Duncan O’Brien. “People keep talking about how Gen Z are far less interested in alcohol and this has meant renewed interest in the soft drinks space as retailers focus more on in-home drinking occasions, while on-trade and foodservice operators more closely consider the on-premise role played by a great soft drinks offering,” he says. “The foodservice sector is where we’re seeing the most growth. Retail seems to be at a crossroads, and some retailers are recognising that there’s a clear need to drive more consumers to the carbonates fixture – the engine room of soft drinks.”

## Let’s dose up on the latest in functional beverages

Functional shots are proving to be the real bright spot within the wider juice and smoothies category, delivering scale (valued at £38m, with +69% MAT volume growth<sup>i</sup>) and incrementality, bringing new shoppers into the category, says specialist shots supplier Mojo. “Looking to the next three years, functional shots are set to be one of the largest growth drivers in total soft drinks, on track to be a £150m category by 2027<sup>ii</sup>, overtaking coconut water in 2025<sup>iii</sup> and providing a huge opportunity for retailers who are already starting to back the category, it adds.

The wellbeing shots category is growing fast, already worth £34.5m<sup>iv</sup>, and by 2025 the category is projected to more than double<sup>v</sup>, says Britvic’s Parker. “Earlier this year, we introduced Mango Sunshine and Beet Balance to the Plenish shots range, available in a 60ml shot, with Mango Sunshine also being available in a 300ml dosing bottle. Mango Sunshine offers 100% of the recommended intake (RI) of vitamin D and Beet Balance is designed to support

overall women’s health with 100% RI of vitamin B6.”

### Gut health

Gut health is a major trend in the functional food and drinks space, seen by the fast rise in kefir products, live cultures and prebiotic sodas in-store, says Mockingbird Raw Press co-founder Chris Laidlaw. Mintel research found this is becoming a relevant trend for the smoothies and juice category, with 23% of consumers interested in this benefit in the former and 26% for the latter<sup>vi</sup>.

“Mockingbird Raw Press has seen success with the reformulation of its Raw Juices to include chicory root fibre, known for its prebiotic benefit and 100% of your daily vitamins per serve. In the 16 weeks since the reformulation our juices are growing at 188% YOY and represent a 35% of the juice-plus category in Waitrose<sup>vii</sup>.”

Functional drinks have seen a real surge in the past year, as consumers become ever more demanding for drinks that deliver refreshment, convenience and tangible health

benefits, says Get More Vits director and co-founder Steve Norris. “The UK vitamin drinks market grew 28% to almost £23m in the last year<sup>viii</sup>, emphasising the shift in consumer behaviour towards prioritising health and wellness. The company’s 1L take-home bottles are now worth over £3.2m<sup>ix</sup>,” he notes.

With consumers more aware of the impact that soft drinks have on their health, the category has shifted towards ‘diet’ alternatives, says functional specialist Hip Pop. “However, these are often full of chemicals which are just as harmful if not more,” it notes. “Frequency and rate of sale of traditional ‘unhealthy’ soft drinks is on the decline. We’ve seen rate of sale decline by 12% in the last 12 months\* for drinks that are household names, which would have been unthinkable only a couple of years ago. Functional drinks are on the rise and taking their place, and we are seeing this actively with the increase in shelf space for healthier alternatives, as well as the development of functional drink bays within grocery.



“Functional soft drinks tend to have added ingredients that offer health benefits beyond taste and hydration, adds Hip Pop. “Refreshment often isn’t enough – consumers are increasingly looking for drinks that benefit their overall health – be it gut, mind/wellbeing, or skin, joints and muscles – and they need to taste good at the same time. Based on the trends we’re seeing across our

own customer base, there’s definitely an increasing desire for functional drinks to support cognitive and mental health – as epitomised by drinks containing CBD and other adaptogens, and also drinks focused on gut health – with a number of launches in this space over the last six months.

“Brands that are all natural and use no sweeteners (artificial or natural) are working to build a healthier

category because of the potential negative impact that sweeteners have on your gut health.”

Dalston’s O’Brien agrees that “there is undeniable buzz around functional soft drinks with the key growth areas being energy and gut health. Gut health has seen a huge explosion in popularity in the US carbonates market, with Poppi and Olipop already heading towards a US\$1bn category, and

we believe Dalston’s alongside other UK gut health fizzy drink players can propel carbonated gut health drinks.”

**Mental wellbeing** Meanwhile Eoin Keenan, co-founder at CBD drinks supplier Goodrays, believes that, for too long, mental wellbeing has been ignored by the food and drink industry, dominated by high sugar, hard alcohol and ultra-processed foods. “But times

are changing,” he says. “In a world of hyperstimulation, mental wellbeing has become more important than high-caffeine boosts. The most cited reason for people to use our products is around reducing stress, improving sleep and finding calm. To help people with their mental health is the cornerstone of what we do, and our ongoing partnership with MIND ensures our customers know what we are about.”

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### Water and coconut water

As the demand for healthier lifestyle choices continues to rise, hydration has become a top priority for consumers, which in turn is fuelling a significant trend in the beverage industry, reveals All Market Europe, which distributes and sells the Vita Coco brand in the UK.

Research by onepoll.com shows that hydration is the No.1 wellness trend in the UK followed by vitamin supplements<sup>27</sup>, it notes. The coconut water category has seen sales of £48.2m over the past 52 wks, up 15.8% YOY<sup>28</sup> and remaining the fastest-growing beverage category by a stretch. This trend mirrors performance in the US and Germany where the category is also up 13%<sup>29</sup> and 72%<sup>30</sup> respectively YOY.

At Aqua Carpatica, PR & trade comms director Alina Balatchi-Lupascu says key market trends include the demand for low- and no-sugar drinks and functional beverages that provide hydration and energy among other health benefits. “Consumers are prioritising wellness, seeking drinks that offer added health advantages. “Aqua Carpatica’s naturally alkaline mineral water is well aligned with these preferences,” she says. .

### CBD

The CBD category has exploded, says Eoin Keenan, founder of Goodrays. “In December, the CBD drinks market is projected to overtake kombucha, a category which has been growing superbly in its own right for nearly two decades. Over the last 12 months we’ve landed major listings such as Sainsbury’s and Ocado, and we’ve secured a spot in the first-ever Waitrose Meal Deal. We were also the only CBD brand listed in the inaugural functional drinks bays in Tesco.”

### Chilled coffee

When it comes to chilled coffee, Starbucks explains how it has moved beyond the dairy sector and into the soft drinks mainstream, which it feels has paid off. “Five years ago, Starbucks chilled coffee was a £50m brand with the majority of sales coming from the dairy fixture in grocery,” reveals Adam Hacking, head of beverages at distributor Arla. “Since then, tangible steps have been made to expand to multiple in-store locations. Today, Starbucks chilled coffee is playing more like a soft drinks operator than a dairy



operator. The brand has tripled in value and is now worth £145m, with an 18% value and 25% volume increase in the last 12 months<sup>31</sup>.”

### Mocktails and adult soft drinks

However, only 16-19% of consumers limiting their alcohol consumption chose low and no versions of drinks to reduce their consumption in 2023<sup>32</sup>, says Britvic’s Parker. “This leaves a big opportunity for retailers to revamp their offerings by adding more choice that tempts shoppers and encourages trade-up from alternatives such as tap water. “Britvic has tapped into this with the launch of its J2O RTD mocktails, with a three-strong premium range of non-alcoholic options: Strawberry and Orange Blossom Mojito, White Peach & Mango Daiquiri, and Blackberry & Blueberry Martini flavours, rolled out in October 2023,” he says.

At Belvoir Farm, Manners notes: “Our mocktail range is the No.1 mocktail

brand in UK grocery on an MAT basis<sup>33</sup> as consumers seek non-alcoholic alternatives and want something more special than a standard soft drink. Our lime and yuzu mojito mocktail is now one of our best selling products.

“We also see strong growth coming through our no-added-sugar cordials, launched last year, as consumers seek low-sugar products. They now account for 20% of the growth in the adult cordial market<sup>34</sup>.”

### Innovation and health

Innovation is key in most fmcg categories, but it definitely rings true in soft drinks, says CCEP’s Yeomans. “In fact, almost half (48%) of the category’s growth in the first half of the year came from new launches<sup>35</sup>, demonstrating that latest launches alongside a strong core range of fan favourites can be a catalyst for sales growth,” he notes. “Innovative variations on much-loved favourites can both appeal to



# Format trends: cans and multipacks

The soft drinks market is seeing growth within cans, as consumers switch out of plastic and seek more sustainable options, says Belvoir Farms' Manners. The company offers 250ml mocktail cans for drinking on-the-go as well as 4-packs for consuming at home, among other formats.

At Aqua Carpatica, Balatchi-Lupascu says: "Our most exciting NPD is the launch of our 330ml single-serve aluminium can, offering the healthiest, eco-friendly sparkling water for consumers on-the-go. This sleek, recyclable can caters to the growing trend of on-the-go consumption while

also addressing eco-conscious preferences."

Sustainability has remained a key driver for consumers over the past 12 months, which has contributed towards cans becoming the biggest and fastest-growing format in 'premium carbonated softs', now worth £52.6m and growing +5%<sup>xi</sup>, says Edwards at Franklin & Sons, which launched its 250ml recycled can format on three of its best-selling flavour SKUs in August last year.

"One trend we're currently seeing in the energy drinks segment is a strong demand for smaller cans," says Suntory's Mistry. "31% of stimulation drinks

are now sold in 250ml cans<sup>xii</sup>, and this smaller format is particularly popular with shoppers aged over 25<sup>xiii</sup>." It recently introduced Lucozade Alert Ultimate Energy and Lucozade Alert Zero Sugar Mango Peachade in 250ml cans.

Meanwhile, with planned social occasions at home increasing by 11.8% during the past four years<sup>xiv</sup>, the opportunity for larger sharing pack formats remains key, says CCEP's Yeomans.

Multiserve is the fastest-growing segment in RTD coffee, says Arla's Hacking. "Such is the popularity of larger formats that... Starbucks chilled

coffee was the fastest-growing brand in this format, increasing 138% year on year (or an equivalent £19m YOY)<sup>xv</sup>," he reveals.

While single formats have been the heartland for nata de coco drink brand Mogu Mogu, one-third of its shopper base would now prefer to buy multipacks<sup>xvi</sup>, reveals brand distributor Asco Foods. Shoppers want easy access to their favourite soft drinks in their own home, while multipack and big bottle formats are perceived to be better value, representing a lower cost per litre, it says. Its nata de coco offer is now available in packs of 6 x 320ml bottles and in family-size 1L bottles.

loyal brand fans, as well as attracting new consumers by creating a sense of intrigue and excitement. Our most recent innovation saw Coca-Cola partner with Oreo, combining the two brands for a limited-edition drink, Coca-Cola Oreo Zero Sugar Limited Edition."

Limited-edition drinks allow brands to explore new flavours while fulfilling the increasing consumer enthusiasm for special edition releases, says Boost's Hipkiss. "For example, in May this year, Boost launched a limited-edition Watermelon & Lime sports drink NPD. This followed the remarkable success of our Raspberry & Mango flavour in 2023, which has now been integrated in the core range, due to its popularity."

The next generation of consumers are consciously choosing healthier options to power their busy and active lives with 50% of consumers shifting their buying behaviour based on health concerns<sup>36</sup> and half of UK consumers

buying into health and wellbeing drinks<sup>37</sup> says Moju. "Category-defining brands such as Moju are delivering strong growth (+58.7% volume growth YOY) by meeting these emerging needs.

There is a noticeable industry movement towards products that meet specific consumer health needs, be it vitamin intake, gut health or clean energy, agrees Get More Vits' Norris. "Consumers increasingly seek drinks that quench more than just their thirst. Particularly since Covid-19, health and wellness have been at the forefront of consumers' minds, with a heightened focus on finding easy, delicious ways to stay healthy."

As health continues to become a greater focus for consumers, growth is also anticipated in share of no added sugar and protein options to reflect the wider soft drinks category, says Arla's Hacking. "In line with this, this year saw the launch of Starbucks Protein Drink with Coffee and Starbucks Frappuccino

Caramel No Added Sugar," he says.

Shopper desire for low- and no-sugar soft drinks is continuing to grow, says Suntory's Mistry. "The low/no-calorie share of the soft drinks market is almost three times that of the regular segment, with over 69%<sup>38</sup> of the volume share of the total market currently.

"It's not just everyday energy drinks that are attracting shopper attention," he adds. "Zero-sugar variants are becoming increasingly popular within the stimulation segment too and are growing by 26%<sup>39</sup>."

"Consumers are preferencing products that support their health and that is playing out in our category by the flavour and ingredient combinations they are selecting," says Mockingbird's Laidlaw. "The top-selling SKU in the smoothie category in four retailers is our 750ml Raw Greens Smoothie<sup>40</sup>, which is notable as it contains over 20% vegetables with superfood ingredients such as spinach,

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kale and broccoli, so is packed with nourishing savoury ingredients as opposed to the fruit-heavy alternatives which previously led the category.”

### Flavours and ingredients

Nichols’ Reay points to a real demand for bold, attention-grabbing flavours, with 59% of UK carbonates shoppers saying flavour influences their buying decisions, she notes. “We’re seeing a surge in adventurous, globally inspired flavours across the soft drinks market, with exotic ingredients increasingly shaping consumer choices,” she adds. “In fact, 58% of category buyers say that hearing about an interesting flavour prompts them to seek it out – a number that jumps to 74% among 16- to 34-year-olds<sup>41</sup>. At Nichols we’ve embraced this trend with the launch of Vimto Discovery, a carbonates sub-brand, with exotic ingredients. Flavours like Mango & Dragonfruit and Passionfruit & Lychee have proven very popular, especially among teens looking for fun, low-risk flavour experiences.”

Flavour innovation is also fuelling growth in energy drinks<sup>42</sup>, she adds. “Permissible energy – such as low calorie or natural sourced ingredients – is growing.”

“Fads come and go, but one thing’s sure – flavour is king,” says Ash Chadha, sales & marketing director at Asco Foods, distributor for Mogu Mogu. “Nothing motivates someone to purchase more than new, exciting and great-tasting flavours,” he says. “As a challenger brand, we’re agile and able to lean into our playful, experimental brand personality, disrupt chillers with bold flavour combinations and also tap into flavour trends while they’re still hot. We’ve always championed exotic flavours, but today’s soft drinks shopper is much more willing to branch out. Nostalgia is big business in food and drink right now, and to keep ahead of the curve we took Mogu Mogu beyond fruity flavours for the first time with our confectionery-inspired Bubble Gum and Cotton Candy flavours.”

Mogu points to ongoing consumer movement towards more “diverse, exciting taste experiences”. “The spicy food trend has become more and more popular, particularly within snacking and beverages, with British consumers’ increasing confidence to explore more unique flavours with widening spice palettes<sup>43</sup>,” says the



company. “For Moju, we continue to see significant growth in interest for natural ingredients that pack an efficacious punch, such as ginger and turmeric – which Moju is making even more accessible through its convenient shot format. Moju’s cayenne-infused Hot Mango Immunity shots have been a huge hit since launching in 2023 and the brand is set to launch an exciting, spicy new variant in winter.”

Britvic’s Parker says consumers are continuously on the hunt for bold new fruit flavours, which provide choice and pique excitement at the soft drinks chiller. In response, the company launched a limited-edition blue cola in the form of Pepsi Electric in May. Boasting “a zesty, citrus taste with a striking blue liquid”, it will be available for 12 months across the convenience, wholesale and grocery channels.

With the launch of three brand-new sugar free SKUs in both its energy and sport ranges earlier this year,

Boost Drinks has seen “a fantastic +23% growth<sup>44</sup> of Boost Sugar Free 250ml”, says Hipkiss. “Global tastes are increasingly influencing the market, with unusual fruit combinations and the use of spices on the rise. Tropical is the second-fastest growing fruit flavour in the category, up +22%<sup>45</sup> and adding +£2.5m RSV in the last year<sup>46</sup>,” he adds.

Franklin & Sons’ Edwards points to paired flavours, particularly with a tropical provenance, recording strong growth over solo flavours, as consumers look for more interesting and complex taste profiles. “Franklin & Sons’ Peach & Mango premium soft launched earlier this year, in response to this insight to capitalise on the trend.”

In addition, exotic flavours becoming more and more popular,” she notes. “Passion fruit is growing (+26%)<sup>47</sup> and adding almost £2m per year to the category<sup>48</sup>, with tropical flavours (Cosmo, Piña Colada) being influenced by the cocktail category,

# Optimising social media and AI

Using social media alongside other marketing has become the norm for soft drinks suppliers, which are also now looking to AI to help enhance their promotional activity.

Social media plays a pivotal role for brands in this digital age, says Franklin & Sons' Edwards. "Buyers at national and international retailers are increasingly looking to a brand's social presence to garner whether it will land well with consumers and therefore positively affect its sales levels," she notes. "People are increasingly looking to consume a lifestyle on social media, rather than just a product, so it's

important that brands look to cultivate this through their content marketing strategy."

Vita Coco is "passionate about using social media to connect with consumers authentically in their own world", says All Market Europe. One example was its 2024 Ramadan campaign, where grassroots Muslim content creators were gifted Ramadan boxes full of essentials needed for Iftar, it says.

While engaging and interacting with fans and ambassadors is incredibly important, it needs to be for the right reason and not just to hit internal KPIs, says Goodrays' Keenan. "While digital content and

social is still king for top of funnel, it's the physical experiences that drive discovery and trial," he notes.

"Platforms like Instagram and TikTok allow us to share our message of purity and wellness in visually impactful ways," says Aqua Carpatica's Balatchi-Lupascu. "Looking ahead AI will be pivotal to personalise consumer experiences and optimise campaigns, as well as to educate younger generations on healthier hydration choices."

Looking ahead, AI will revolutionise brand promotions and sales, agrees Nichols' Reay. "While social media will remain essential for discovery and engagement,

AI will enhance our ability to analyse consumer behaviour, personalise marketing, optimise ad targeting and streamline customer interactions."

Dalston's O'Brien says: "AI technology is spitting out extremely useful tools for small businesses; large ones have been using them for a decade, so the new tech is moving the playing field in small brands' favour." However, he warns: "There's a huge danger in brands relying on AI in the creative area of communications; new generative output is generally severely wide of the mark, and brands risk their reputations if they lose the human touch."

and, interestingly, ginger and turmeric seeing a surge in popularity, driven by wellness products."

At Goodrays, Keenan says tropical was always key to its CBD brand. "We picked flavours that harnessed the flavour of CBD, not blocking it entirely but rather making sure the final result was balanced. Some brands on the market went down the route of masking the flavour of CBD with artificial sweeteners... but we wanted recognisable flavours that would be uniquely Goodrays, rather than a cola or lemonade plus CBD. We then added something special and exotic, like yuzu or pomelo, to make sure it really hit the 'adult drinking occasion'. Therefore, Elderflower is mixed with Yuzu, Blood Orange combines with Grapefruit, Passionfruit & Pomelo and Raspberry with Guava."

"Global flavours are increasingly shaping beverage trends," says All Market Europe. "With a growing

curiosity for international cuisines, people are embracing beverages that offer a sense of discovery and cultural experience. Coconut is a key example of a global flavour profile consumers are seeking – and we see this growth in the adventurous consumer mindset." The company has extended its range into a low-sugar strawberry and cream flavoured Vita Coco Treats, which it says is already outselling its Original Coconut Water. "This offers an exciting Treat for flavour-savvy shoppers who are seeking something beyond the ordinary, artificial or sugar laden options available," it says.

Purity Soft Drinks' Baldwin points to some sourcing difficulties in the market requiring brands to pivot on flavour. "2024 has been a challenging year for orange as a flavour. Devastating orange harvests in Brazil and Florida, alongside climate change and supply route disruption, have escalated the cost of cultivating, processing and

supplying orange juice," she says

"Amid these challenges, we've seen apple skyrocket in popularity. Juice Burst Apple has overtaken Orange as our bestselling flavour, seeing unit growth of 9.1% in recent months<sup>49</sup> and is the No.1 apple juice SKU in drink now<sup>50</sup>."

She also points to the "ice tea flavour" as a popular trend, growing ahead of the category at +16%<sup>51</sup> to reach a value of nearly £64m<sup>52</sup> in the UK. Its latest NPD, Juice Burst Peach Ice Tea, was launched to meet consumer demand for healthier ways to enjoy this on-trend flavour, she says.

Monster Brands Co has also seen success with its Monster Juiced Bad Apple, citing it as the "best-performing energy launch in 2024"<sup>53</sup>, says CCEP's Yeomans Other fruity introductions from the brand include Monster Reserve Orange Dreamsicle, Monster Nitro Cosmic Peach and, most recently Monster Ultra Strawberry Dreams.

While new flavours will always have

## Analysis

a role to play in the soft drinks category with more niche flavours such as yuzu stretching consumers' imaginations and tantalising their taste buds, Get More Vits' Norris believes the biggest opportunities for growth lie in flavour profiles that are familiar, particularly if the goal is to switch consumers seamlessly from sugary carbonated soft drinks to healthier options. Building on its original Mango & Passionfruit flavour, the company has added Sparkling Pineapple & Grapefruit and Still Raspberry & Pomegranate, offering "two familiar flavour profiles that will broaden the appeal of a drink containing the ever more important Vitamin D", he says.

In terms of functional drinks, trending ingredients include vitamins, minerals, live bacteria, prebiotic fibre, CBD and more recently, functional mushrooms such as reishi or lion's mane, reports Hip Pop.

"We're seeing increased interest in more functional-based ingredients," agrees Dalston's O'Brien. "We launched Dalston's Happy Gut this year with prebiotic fibre, zinc, magnesium and calcium. You may have heard of prebiotics and probiotics but what about postbiotics?" he asks. "There's a front emerging between the desires of some food & drink makers in the functional space and what is legally possible; for example [there are] some ingredients such as a 'pure' readily absorbable blood-brain-barrier crossing form of GABA [gamma-aminobutyric acid, known to produce a calming effect] in development but they will inevitably hit novel foods regulation, which will delay any potential launches in that area for several years."

### In-store improvements

Stores continue to be awash with innovation across all categories and as such the shopping experience can present a challenging navigational exercise, says Get More Vits' Norris. Branded bays have emerged within soft drinks over the last 18 months, with Tesco leading the charge in this area. Furthermore, they led the way again earlier this year, launching a functional drinks bay in just under 200 stores. The Get More Vits team worked with Tesco on this development and early results have been encouraging, suggesting that it is giving shoppers what they want, both in terms of product range



and in-store orientation across a tangible number of stores, he says.

According to Suntory's Mistry, attention to detail in drink placement and selection isn't just about aesthetics – it's about connecting with the shoppers' desire for convenience, quality and value. He offers some tips for amplifying soft drinks sales, including: beacon brands – using best-selling brands to guide shoppers through a store; colour blocks to make sections easy to spot and attractive; range rationalisation, focusing on high performers and cutting out under-performers; product flow, encouraging consumers to trade up with a 'good, better, best' arrangement; clear signage to ensure meal deals and promotions are visible and appealing; and blocking low-or no-sugar branded options to attract health-conscious consumers."

At Asco Foods, Chadha says that, to keep the shopper experience as seamless as possible in a "highly

competitive and saturated category", retailers need to keep the best-sellers at eye level and clearly signpost them with branded materials, like barkers. "The beauty of nata de coco beverages is that it's a younger and far less saturated segment. Shoppers looking for a textured drink are likely to know exactly what they want. Mogu Mogu is the clear runaway leader here."

Functional health drinks are less visible in store and are often under-spaced, says Moju. Making them more visible with greater share of fixture and optimal shelf position especially for best-selling challenger brands bringing innovation and excitement to the category. Retailers should back trusted and familiar category-defining brands like Moju who are investing in building awareness and trust of the functional shots category, it says, revealing that its latest £2m campaign, set to reach 85% of UK adults, is already seeing significant gains in brand penetration



growth. “Expanding functional drinks’ presence further to secondary space is key to driving further penetration and trial of leading functional drinks. Featuring functional shots in these secondary spaces can result in over 100% volume uplifts in the major grocery stores. (+165% volume uplift Ginger 420ml in a major grocery retailer in Sept 2024<sup>54</sup>.)”

Goodrays’ Keenan believes the average consumer is actually much further ahead of the game when it comes to functional drinks than they are given credit for. “As a relatively new category in retail [CBD], we thought we would have a much bigger challenge with education but shoppers have adopted us with ease, with our mixed pack becoming the best-performing functional SKU in two major retailers,” he says. “So I don’t think it’s confusing, and in fact, I think consumers are driving these trends into retail, rather than vice versa. We also need to

give credit to the retailers who have played a major part in education too. For example, Tesco launching its functional bay has had a huge impact, as they are recognising the growth of the category very clearly and making it easier than ever for consumers to find what they need.”

While the adult cordial market is very clear in-store with a good, better, best tiering fixture, the sparkling sector, on the other hand, is very confusing to shop, says Belvoir Farms’ Manners. “The shopper has so much choice and different locations in-store. We are not making it easy to shop at all. There is no signage and we don’t talk about different consumption occasions – it’s all just mixed up at the fixture. As a result, retailers are struggling to trade shoppers up into premium soft drinks, and they are trading down to core carbonates or water.”

“The smoothie category remains flooded with high levels of duplication, with a proliferated choice of products driven by two key brands which are made in the same way with similar flavour profiles, which can be confusing for consumers to distinguish between,” says Mockingbird’s Laidlaw. “As a result, the category is highly reliant on price promotions with high consumer switching. Consumers need exciting new propositions and genuine innovation to keep them interested at fixture, as well as a clear structure of good, better, best to drive trade up and value into the category. Retailers could do more to communicate this clear tiering and separate functional SKUs from flavour led offerings by calling out elements like process or key ingredients and benefits.”

Dalston’s O’Brien sums up: “The waves of innovation and opening of co-packing and the investment industries has meant bonkers levels of choice. As one industry observer put it to me recently ‘consumers don’t stand a chance’. This is why we try to keep things simple with Dalston’s – single-fruit flavours are championed in each of our drinks and we aim to keep our ingredients concise and easy-to-understand. The movement toward functional, or benefit-led bays feel like a strong move toward aiding consumers in the decision-making process.

“The confusion of categories especially in no-low and alcohol and soft drinks is developing, but it’s in

response to both new availability and rising demand, which hasn’t quite matured yet. We’re going to see more focus on new shopping occasions; for example if you’re shopping for a dinner party you might be in the beer and wine aisles and be wanting quality soft options close to hand for your guests. We’ll likely increasingly see ranging of premium soft drinks in spaces they aren’t accustomed to in order to better hit modern shopper missions.”

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All Market Europe – Vita Coco

# Coconut water surges ahead

DETAILS

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KEY BRANDS

Vita Coco  
 – Coconut Water  
 – Pressed Coconut Water  
 – Coconut Oil

↙ Vita Coco’s sales have skyrocketed with another year of unstoppable growth for the world’s No.1 coconut water brand<sup>1</sup>, reveals the company. “Over the past 52 weeks, the coconut water category has grown +15.8% year on year<sup>2</sup>, while Vita Coco’s sales have grown +20.6%<sup>3</sup>,” it notes.

With an 89.8% share of the coconut water category<sup>4</sup>, Vita Coco is single-handedly driving the fastest-growing category in beverage<sup>5</sup>. Vita Coco 1L Original is the third-largest SKU in the entire juice and smoothie category<sup>6</sup> and 500ml Original is the 7th largest in the entire front- and back-of-store portfolio<sup>7</sup>.

Tim Rees, managing director of Vita Coco EMEA, says: “In the past year we have seen strong growth for Vita Coco, which is testament to consumers better understanding the health benefits of coconut water. Vita Coco is poised for further growth as we continue to educate consumers on why and when they should drink coconut water.”

These benefits have been carefully communicated to consumers in recent years through marketing campaigns – and the growth in the health-conscious consumer has ensured that Vita Coco has grown from a niche to a household staple across the country. “Over the colder months, consumers are encouraged to ‘supercharge their smoothies’, using coconut water as a lower-sugar alternative to sugary fruit juice bases,” says Rees. “During Ramadan, Vita Coco is perfect to ‘break fast, fast’ as the naturally occurring electrolytes help support rehydration.”

Over the summer, Vita Coco focused



“Vita Coco is poised for further growth as we continue to educate consumers on why and when they should drink coconut water”

its marketing on hydration in sport. Having partnered with Zharnel Hughes, Britain’s fastest-ever man and bronze Olympic medallist, the company ran a 360-degree ‘Sprinting for Thirst Place’ campaign, with a competition across retail to win hundreds of sports-related prizes, as well as a trip to Jamaica to train with Zharnel. Alongside this, Vita Coco was signed as the Hydration Partner of British Athletics – highlighting it as the go-to natural hydration beverage – from the 1km joggers who need refreshment to the elite Olympic athletes who need serious rehydration. Rees says: “At Vita Coco we believe there is no better way to showcase the power of coconuts than through our collaboration with some of the UK’s finest athletes. Together, we aim to fuel greatness, both on and off the track, and inspire everyone to achieve their Thirst Place.”

Next year, Vita Coco will launch Treats – available in Creamy Strawberry – as an extension of its current range. “With no added sugar and all natural flavourings, it will bring a whole new meaning to the ‘treat yourself’ trend,” he adds. “In the US, Treats regularly outsells our Original coconut water in key retailers, so its potential is massive. We can’t wait to see it create more buzz on-shelf in the UK’s beverage category.”



Source

<sup>1-4</sup> Circana data, 52 w/e 07.09.24  
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# THE WORLD'S GONE COCONUTS. HAVE YOU?

COCONUT WATER  
+19.1% YOY\*

VITA COCO  
+24.6% YOY\*

VITA COCO  
92.3%  
CATEGORY SHARE\*



## AQUA Carpatica

# Benefiting health and planet

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### KEY BRANDS

**AQUA Carpatica Natural Mineral Water**  
**AQUA Carpatica Sparkling Flavours**

➔ The latest product innovation at Aqua Carpatica is the eco-friendly 330ml sparkling natural mineral water can, which is sleek and stylish, single-serve, designed to be portable and convenient, and meet the needs of today's increasingly health-conscious and environmentally aware consumers.

Sourced from pristine aquifers, known for their exceptional purity, naturally low sodium levels, and rich mineral content, Aqua Carpatica is virtually nitrate-free, making it one of the healthiest hydration options available, especially beneficial for pregnant women, infants and individuals mindful of their overall wellbeing, says the company's PR & trade comms director Alina Balatchi-Lupascu.

"The new 330ml aluminium can delivers all the health benefits of our natural mineral water in a convenient, on-the-go format," she explains. "The can is a reflection of Aqua Carpatica's commitment to sustainability. Infinitely recyclable, lightweight and shatterproof, it is both convenient and addresses the growing demand for eco-friendly packaging solutions. As more consumers seek out products that reflect their environmental values, the recyclable nature of our can aligns with these expectations and helps retailers fulfil the demand for sustainable products, making Aqua Carpatica a must-have on any premium water shelf."

### Addressing consumer needs

Today's consumers prioritise health, wellness and the environment in their purchasing decisions, she notes. "Aqua Carpatica's new 330ml can fits seamlessly into these trends. Whether at the gym, at work or in social settings, consumers can enjoy our sparkling water in a portable, environmentally friendly format. Available in convenient multipack options, the product addresses the increasing demand for smaller, premium, and portable beverages, making it ideal for single purchases or stocking up at home."

### Marketing and AI integration

To reach the right audience, Aqua Carpatica is launching a comprehensive



“Introducing AQUA Carpatica’s new 330ml sparkling natural mineral water can: the perfect choice for health- and sustainability-conscious consumers”

marketing campaign across social media platforms, showcasing the purity, sustainability and premium quality of its natural mineral water.

"In addition, AI-driven tools and placements will allow us to provide personalised recommendations and highlight the health benefits of our product," says Balatchi-Lupascu. "This innovative approach will help shoppers make more informed choices, driving purchase. AI will also optimise our targeted promotions, ensuring retailers see increased demand and sales."

### A must-have for retailers

Retailers can capitalise on the growing demand for premium, eco-friendly, and health-conscious beverages by stocking Aqua Carpatica, she adds. "With its sleek design, premium positioning, and sustainable attributes, the products are set to attract loyal customers who value both wellness and the environment.

"Aqua Carpatica's exceptional purity, naturally alkaline, low-sodium composition and excellent quality make this product a perfect fit for today's health-conscious consumers. We take pride in delivering a product that is pure, healthy and sustainable."

Pure, natural, and unmatched – Aqua Carpatica is the water consumers will search and keep coming back for.



# HEALTHY HYDRATION ON-THE-GO



NATURAL MINERAL WATER  
NATURAL ELECTROLYTES  
LOW IN SODIUM

ASCO Foods – Mogu Mogu

# Disrupting the drinks chiller

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KEY BRANDS

**Mogu Mogu**

Since its UK launch in 2018, Mogu Mogu has stormed the soft drinks market to become one of the fastest-growing brands<sup>1</sup>, disrupting the status quo by bringing something genuinely new to drinks chillers, says Ash Chadha, sales & marketing director at brand distributor for UK & I, Asco Foods. Shoppers are proving thirsty for the uniquely refreshing drinking experience of this fruit-flavoured line-up of drinks, featuring soft, chewy nata de coco pieces – so much so that, in 2023, Mogu Mogu sold in excess of 41m bottles<sup>2</sup>. Today, it's the leading nata de coco beverage, boasting double the brand awareness of its closest direct competitor<sup>3</sup>.

“Soft drinks are a staple part of the UK’s everyday routine,” notes Chadha. “They present a mammoth sales opportunity – yet there’s still significant room for growth. An increasing number of shoppers are growing tired of their usual energy drinks, colas and carbonates. They’re looking to switch up the norm with something equally refreshing, but more interesting.

“Offering a multi-sensory drinking experience, Mogu Mogu’s distinctive chewy texture and refreshing array of flavours has helped us to successfully disrupt the category and become a mainstay in the drinks chiller.”

**Marketing power play**

To sustain this momentum, Mogu Mogu has partnered with global K-Pop sensation Seventeen – the second biggest-selling artist of 2024, only outsold by Taylor Swift – as part of a heavyweight marketing investment which includes a special promotion with every bottle and a major nationwide OOH campaign, adds Chadha.

“Social media has been critical to our UK success, so we’ve engaged our Gen Z/Millennial fanbase with targeted marketing,” he adds. “This includes leveraging celebrity and influencer culture with strategic partnerships.”

Mogu Mogu has also been raising its profile among Brits with a national six-figure OOH campaign that went live across more than 1,000 locations including bus stops, digital screens,



“The brand’s chewy texture and refreshing array of flavours have helped us to disrupt the category”



supermarkets and shopping malls, propelling awareness to an all-time-high. “Now more people know the brand, we’re encouraging them to purchase,” says Chadha. “Our conversion rate is already sky-high, with almost two-thirds of those aware of the brand choosing to buy it<sup>4</sup>. To drive this further we have a code under cap promotion across all our bottles.”

**Bringing the flavour**

Mogu Mogu is also focused on its innovation pipeline. “With nostalgia now one of the hottest trends in food and drink, as a challenger brand Mogu Mogu took the opportunity to lean into its playful brand personality, launching fruity flavours for the first time this year with our confectionery-inspired Bubble Gum and Cotton Candy flavours. These help shoppers reminisce on long-loved sweets and fairground-favourite flavours with every sip,” he concludes.

Source

<sup>1</sup> NielsenIQ, Total Impulse, 52 w/e 09.03.24, +216%  
<sup>2</sup> Number of bottles sold by the business in UK&I, 2023  
<sup>3&4</sup> Levercliff Consumer Research



# SIP CHEW CLAIM REWARDS

SPECIAL PROMOTION WITH EVERY BOTTLE  
M123456789  
PROM CODE UNDER THE CAP



Worth £12M in Impulse alone<sup>2</sup>

41 million bottles sold last year<sup>1</sup>

UK's Fastest Growing Soft Drinks Brand (+216%)<sup>2</sup>



<sup>1</sup>Number of bottles sold by the business in the UK&I, 2023 <sup>2</sup>NielsenIQ Total Impulse 52 w/e 09.03.24

Belvoir Farm

# Letting nature do the talking

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KEY BRANDS

Belvoir Farm

At Belvoir Farm, we've been helping nature do its thing for over 40 years, says managing director Pev Manners. "We make our premium drinks on the family farm in the heart of the British countryside, using traditional methods, simple honest ingredients and nothing artificial," he notes.

"Our sparkling soft drinks and still cordials are loved by consumers around the world. They are refreshingly real and reassuringly delicious. Each one is made using natural fruits, hand-picked flowers, fresh juices and spices. We're true to nature and let the ingredients do the talking."

Belvoir Farm is renowned for its delicious flavour combinations and category-driving NPD, adds Manners. "We understand our consumer and their motivations, and have developed a range of products to offer choice across different consumption occasions. Our no-added-sugar cordial brings a new shopper into the category and drives considerable category value, and our delicious mocktails make up the No.1 mocktail brand in UK grocery<sup>1</sup>, with Lime and Yuzu Mojito being the best selling product in the range, and one of the most loved in the Belvoir portfolio."

**Sustainability at heart**

"Our consumers care about the planet and so do we," continues Manners. "Sustainability is at the heart of everything we do, our mantra is to leave the land better than how we found it. We are a zero waste to landfill company and help power our factory



**“We are renowned for our delicious flavour combinations and category-driving NPD”**

with solar energy, with the goal of becoming energy independent.

"We have also planted over 10,000 trees, 3,000 more elderflower bushes and have an amazing wildlife ecosystem. Moreover, since 2018, we have cut our CO2 emissions by over 40%, but we won't stop there, we are on a mission to be carbon neutral by 2035."

**Marketing mission**

Belvoir Farm will be investing heavily in and accelerating marketing activity next year to grow brand awareness, support NPD launches, and drive penetration into the adult soft drinks category, adds Manners.

"We have also invested in the team to ensure we are communicating to our target consumers in the relevant channels," he says. "So watch this space for our exciting marketing activity."



Source  
<sup>1</sup> Circana, Total Sales, 52 w/e 04.08.24

# Belvoir Farm

# No.1

## MOCKTAIL BRAND IN THE UK

**REAL FRUIT.  
NOTHING ARTIFICIAL.  
SUSTAINABLY MADE IN THE UK**

Source: Circana (total sales 52wk to 04.08.24).



NEW

## NO ADDED SUGAR

# Cordials

## DRIVE 20% OF CATEGORY GROWTH

Circana (total volume sales 52wks to 04.08.24)

**GREAT TASTE. REAL FRUIT. LOW CALORIE.**



**BIGGER CANS**  
**BIGGER SALES**



**BOOST IS #3 ENERGY STIMULATION BRAND\***

**500ML IS THE LARGEST ENERGY DRINK SIZE WORTH £745M\*\***

**BOOST TOP 3 SELLING FLAVOURS\***



**GIVING YOU THE FACTS, STRAIGHT...**

\*Circana Total UK Market Unit Sales to 52we 10th August 2024  
\*\*Circana Total UK Market £ Sales to 52we 10th August 2024

**Boost Drinks**



**Boosting its cross-sector base**

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Commercial Director.

**KEY BRANDS**

**Boost**  
– Energy, Sport, Iced Coffee  
**Rio Soft Drinks**

Boost is the sole brand to hold a top-three position in three distinct categories within the functional drinks market – energy stimulation, sports drinks and RTD iced coffee<sup>1</sup> – and earlier this year launched its dynamic brand refresh, with eye-catching new packaging that leaps off the shelf, reveals the company.

The brand’s diverse range combined with its unrivalled value allow Boost to offer retailers solutions that suit all audiences and drive increased profit margins, it says.

Its newly expanded Energy Sugar-Free range – which this year saw the successful introduction of Tropical Blitz and Apple & Raspberry 250ml flavours – helps cater for the growing trend in health-conscious consumers, with 1 in 3 now opting for more sugar-free beverages<sup>2</sup>. And its delicious new limited-edition Watermelon & Lime Limited Sport SKU taps into the 30% rise for Mixed Fruit and Berry flavours in the soft drinks category<sup>3</sup>.

Plus, new this month, Boost has launched 500ml Energy cans in Original, Sugar-Free Original, and Red Berry flavours, following +20% YOY growth in the 500ml energy drinks sector<sup>4</sup>.

Boost is also committed to being a transparent and collaborative partner to wholesalers and retailers. As such, it is constantly monitoring the ever-evolving retail landscape and consumer trends so that it can advise its partners across all touchpoints.

**Source**

<sup>1</sup> Circana GB Symbols & Indies and NI Convenience Units Sales 52 w/e 29.06.24  
<sup>2</sup> INK Quantitative Research Findings, August 2022  
<sup>3</sup> Circana Total Market, Supermarkets, Convenience Multis, GB Symbols & Indies and NI Convenience, Petrol & Travel Value 52 w/e 23.03.24. Cousins Davis U&A Research  
<sup>4</sup> Circana Total UK Market £ Sales to 52 w/e 10.08.24

## Dalston's Soda Co

# Revolutionising soft drinks naturally

### DETAILS

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### KEY CONTACTS

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Founder  
**Leonie Holland**  
Marketing Director

### KEY BRANDS

**Dalston's Core Range:**  
Rhubarb; Cherry; Peach;  
Pineapple; Elderflower;  
Lemon; Ginger Beer  
**Happy Gut Range:**  
Happy Gut Raspberry;  
Happy Gut Tropical

### Source

<sup>1</sup> Dalston's Consumer Survey  
2022  
<sup>2</sup> Internal sales data, January to  
September 2024

↓ Dalston's Soda is made by chefs on a mission to revolutionise soft drinks. "We found a clear gap in fruit carbonates," says founder and former chef Duncan O'Brien. "While other categories were being revitalised by healthier, more exciting brands, traditional soft drinks lagged behind, stuck in an ultra-processed timebomb."

Consumers are now less willing to compromise on food and drink choices. Exciting flavours, sustainable brands, and natural ingredients are in demand and people are moving away from traditional softs toward healthier, great-tasting alternatives. With clean, all-natural labels, Dalston's core range boasts 5 or fewer ingredients per drink, earning it a loyal following. Three of its flavours have Great Taste awards, with 'flavour' the primary reason customers choose Dalston's<sup>1</sup>. Dalston's Pineapple NPD grew over 200% this year<sup>2</sup>, "rapidly matching the rate of sale of our best-selling products", reveals O'Brien.



“Dalston's is propelling gut-health drinks into the mainstream”

Dalston's is now extending into the functional space, with its Happy Gut Soda in Raspberry and Tropical flavours launched this year. Each can contains 3g of fibre, as well as calcium, magnesium, and zinc, offering digestion, metabolism, and immunity support. With over 1,300 distribution points already, Dalston's is propelling gut-health drinks into the mainstream.

# Someone drinks a can of Dalston's every 5 seconds.

**No Artificial Sweeteners**

**NO ADDED SUGAR**

**NO ADDED SUGAR**

**NO ADDED SUGAR**

**great taste**

**REAL PRESSED PINEAPPLE**

**REAL SQUEEZED CHERRY**

**REAL SQUEEZED PEACH**

**All Natural**

Britvic Soft Drinks

# Make soft drinks unmissable

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 Retail Commercial Director

KEY BRANDS

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- 7UP
- Robinsons
- Rockstar
- Lipton
- Jimmy's Iced Coffee
- Tango
- Aqua Libra
- Plenish
- Purdey's
- Fruit Shoot
- Britvic Mixers
- London Essence
- Mathieu Teisseire
- R. Whites

There has been a steady stream of innovation over the course of the past six months at Britvic; it's a key part of the business' mission to ensure consumers have choice within the soft drinks fixture while driving excitement, says Ben Parker, retail commercial director at the company. "In turn, this will help retailers to drive footfall and sales," he notes. "Our pipeline this year has included Pepsi disrupting the cola category once again with a limited-edition blue cola launch, Pepsi Electric. Following a successful rebrand earlier this year and longstanding flavour innovation within the market, the new launch challenges what consumers expect from a cola – boasting a zesty, citrus taste with a striking blue liquid.

"The brand didn't stop there," he adds. "Following the continued success of Tango's rotational flavour series Editions, we also announced the arrival of Tango Mango and Tango Cherry Sugar Free to the market. The Tango Editions range has driven additional sales, and the rotational change seasonally maintains excitement and engagement with the brand and helps deliver the needs of consumers who are on the hunt for bold new fruit flavours. Tango is back on TV with its multi-million-pound 'Outrageously Orange' campaign, also running across video on demand and social media platforms."

From a marketing and advertising perspective, Britvic recently rebranded Pepsi to offer a consistent identity across the Pepsi Max, diet, regular and flavoured cola ranges, with new packaging visuals, social materials and displays. This was supported by a fully integrated campaign, including TV, radio, out-of-home and experiential marketing.

Meanwhile Plenish, the fastest-growing dairy alternatives<sup>1</sup> and juice shots brand in the UK<sup>2</sup>, gained its first-ever TV sponsorship with Channel 4, he reveals. "The six-month partnership, which began in August this year, sees Plenish sponsor Channel



“Our brands are driving excitement in the soft drinks category, by offering products that tap into current trends”

4's breakfast programming, with four ident's between popular sitcoms such as The Simpsons and Frasier," he says. "With an estimated reach of more than 9m people, the sponsorship follows Plenish recently launching its new campaign platform 'Wake Up with Plenish' earlier this year and represents the brand's largest marketing investment to date.

"Our brands are driving excitement within the soft drinks category by offering innovative products that tap into current consumer trends, such as bold new flavours and limited-edition releases, while engaging fans with dynamic campaigns that resonate with a younger audience," concludes Parker. "The portfolio is focused on delivering taste and experience, as well as creating a strong 'must-have' factor for retailers to help them drive footfall and increase sales with products that consistently capture attention."



Source

<sup>1</sup> NielsenIQ RMS, Total Coverage GB, Dairy Alternatives exc. RTD & Flavoured & Private Label (as defined by Britvic) valued >£500k MAT, Value Sales data MAT to 07.09.24  
<sup>2</sup> Nielsen, Total Coverage, Britvic Defined Juice Shots, Value Sales, Data 24.08.24



# GET READY FOR



# IMMUNITY SEASON



STOCK UP ON OUR RANGE OF HEALTH SHOTS

# Plenish

IT'S ALL GOOD

Coca-Cola Europacific Partners GB

# Soft drinks remain resilient

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KEY BRANDS

Coca-Cola™  
 Fanta  
 Dr Pepper  
 Sprite  
 Schweppes  
 Oasis  
 GLACÉAU Smartwater  
 Appletiser  
 Costa Coffee RTD  
 Powerade

➔ The soft drinks category is big and resilient and now worth £20bn across GB, delivering £3.9bn growth since 2019<sup>1</sup>. The category has been able to maintain sustained growth because of its relevance for different consumers, occasions and customer channels.

“The key to tapping into the soft drinks opportunity is a strong core range of brands and formats that appeal to a broad range of shoppers, and space for the latest launches that will bring excitement to the soft drinks aisle,” says Rob Yeomans, VP commercial development at CCEP GB. “Innovation has delivered £167m of sales in soft drinks so far in 2024<sup>2</sup> within retail and this is equal to 48% of category growth<sup>3</sup>, highlighting the importance of both NPD and popular fan favourites.”

**Sparkling soft drinks**

“With a portfolio that accounts for over one-quarter of all soft drinks sales value in retail<sup>4</sup>, Coca-Cola Europacific Partners Great Britain (CCEP) remains the largest supplier in the category and we continue to invest in our biggest brands, including Coca-Cola Original Taste, Coca-Cola Zero Sugar, Fanta and Dr Pepper – which are all delivering value growth<sup>5</sup>,” says Yeomans.

“However, we also remain committed to bringing exciting innovation to market. Highlights from 2024 include Coca-Cola Lemon (with and without sugar), which is the No.1 soft drink launch of 2024<sup>6</sup> and, most recently, a limited-edition Coca-Cola Zero Sugar x Oreo variant, which sparked huge excitement among fans of both brands.”

**Elevating occasions**

“Many of our brands are synonymous with some of the biggest calendar and seasonal moments of the year,” he adds. “Diet Coke was the talk of summer with its personalised Diet Coke Break campaign and reveal of its new brand ambassador, Jamie Dornan. And Coca-Cola™ was the official soft drinks partner of the UEFA EURO 2024™, helping Coca-Cola Original Taste and Coca-Cola Zero Sugar outperform their nearest rivals during the tournament<sup>7</sup>.



“The key to tapping into the soft drinks opportunity is a strong core range of brands and formats”

“Fanta, meanwhile, has become the go-to soft drink of Halloween, accounting for one in every four flavoured carbonates sold in the four weeks to Halloween 2023<sup>8</sup>. For Halloween 2024, it has launched a limited-edition ‘Fanta Zero Afterlife’ variant, and the full Fanta flavour range has undergone a temporary makeover featuring characters from the new Beetlejuice Beetlejuice movie.”

**Festive time with friends and family**

Last year, soft drinks delivered its biggest ever year<sup>9</sup>, with Coca-Cola the soft drink of choice for more than 10m households in GB<sup>10</sup>, says Yeomans. “Our usual seasonal magic will include festive on-pack promotions and Coca-Cola Christmas advertising,” he notes.

The festive period is also key for mixers, accounting for 20% of the category’s annual sales<sup>11</sup>. “Schweppes, a firm festive favourite, will be back this year with limited-edition pack designs and a festive ‘Born Social’ marketing campaign,” he reveals

“2025 will be a fast start with exciting campaigns and activations to help drive sales for our customers.”



Source

<sup>1</sup> Nielsen, Total GB & CGA, Total GB to June 19-June 24  
<sup>2</sup> Nielsen, Total GB value data MAT to 10.08.24  
<sup>3</sup> Nielsen Total GB value data MAT to 15.06.24  
<sup>4</sup> Nielsen, Total GB Value 10.08.24  
<sup>5</sup> Nielsen, Total GB Value 15.06.24  
<sup>6</sup> Nielsen, Total GB, 4 weeks to 04.11.23  
<sup>7</sup> Nielsen, Total GB Value 4 weeks to 30.12.23  
<sup>8</sup> Kantar GB, Take Home Panel, Total Stores, Total Soft Drinks, Trips & Shopper numbers, 8 w/e 24.12.23  
<sup>9</sup> Kantar, Take Home, At Home/Carried Out Consumption, Occasion Size vs RoY, Sectors over index at Occasion



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SOFT DRINK BRAND IN GB\*

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\*CGA data, Total On Premise, MAT Val to 16.06.24 and Nielsen data, Total GB, MAT Val to 16.06.24  
(Coca-Cola Trademark includes Coca-Cola Original Taste, Coca-Cola Zero Sugar and Diet Coke)

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Coca-Cola Europacific Partners GB – Monster Energy Co.

# Fuelling growth in energy

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 VP Commercial  
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**KEY BRANDS**

**Monster Energy**  
**Relentless**  
**Reign Storm**

➔ Monster remains a major driving force of growth within energy, supercharging sales over the last year and becoming the fastest-growing major energy brand in GB<sup>1</sup>.

The energy category is now worth £2bn and Monster is powering this growth, adding more sales value than any other brand<sup>2</sup>, reveals Rob Yeomans, VP commercial development at brand distributor CCEP GB. “In fact, Monster has added an extra £108m worth of sales<sup>3</sup> over the last year to be worth more than £656m<sup>4</sup>, against a backdrop of almost 10% volume growth<sup>5</sup>,” he says.

Energy drinks have evolved hugely since they first hit the GB market back in the 1990s. “Monster has played a big part in this evolution, delivering innovation that covers a variety of flavours, juice blends and functional benefits to help make energy drinks more mainstream,” he notes. “And as a result, energy drinks are adding more value to the soft drinks category than any other segment<sup>6</sup>.”

**Strong core and bold innovation**

Monster is renowned for its strong core range, bolstered last year by the arrival of Monster Original zero sugar – clocking up £16m sales in less than a year<sup>7</sup> – epic marketing campaigns aligned with fan interests such as gaming and high-octane sports and bold innovation. This year, NPDI includes Monster Reserve Orange Dreamsicle, Monster Nitro Cosmic Peach and, most recently, Monster Ultra



“Energy drinks have evolved hugely since they first hit the GB market back in the 1990s, and Monster has played a big part in this evolution, delivering innovation that covers a variety of flavours, juice blends and functional benefits”

Strawberry Dreams, which joined the Ultra range – the No.1 zero sugar energy brand in GB<sup>8</sup>. But the biggest success story of the year is Monster Juiced Bad Apple, which is the best-performing energy launch in 2024<sup>9</sup>, adds Yeomans.

**Different needs and occasions**

Energy drinks continue to increase in appeal to more consumers on more occasions throughout the day<sup>10</sup>. “On-the-go is still the biggest shopper mission for energy, but the popularity of home-based energy drink occasions continues and this can be seen by the ongoing volume and value growth of Monster multi-packs<sup>11</sup>,” he notes.

“The Monster Energy Co portfolio also provides choice to energy fans through its wider offering,” he adds. “Relentless is the No.4 energy drink brand in GB<sup>12</sup> and this year it expanded with the launch of Relentless Fruit Punch. This saw its price-mark across the full range back at a £1, appealing to value-conscious shoppers while on-the-go.”

The portfolio also now includes a clean energy range called Reign Storm, part of the emerging wellness energy segment. With three tropical flavours – Valencia Orange, Peach Nectarine and Kiwi Blend – it uses natural colours and flavours, with no added preservatives and zero sugar. It also contains vitamins and minerals alongside naturally-sourced plant-based caffeine from green coffee beans, guarana and green tea.

2024 has been yet another epic year for the Monster Energy Co and CCEP with more innovations and high-octane marketing activity to come in 2025.



**Source**

<sup>1</sup> NIQ, Total GB, val MAT w/e 15.06.24  
<sup>2</sup> NIQ, Total GB, val MAT w/e 10.08.24  
<sup>3</sup> NIQ, Total GB, val MAT w/e 15.06.24  
<sup>4</sup> NIQ, Total GB, val MAT w/e 10.08.24  
<sup>5</sup> NIQ, Total GB, val MAT w/e 15.06.24  
<sup>6</sup> NIQ, Total GB, val MAT w/e 10.08.24  
<sup>7</sup> NIQ, Total GB, val MAT w/e 15.06.24  
<sup>8</sup> NIQ, Total GB, val MAT w/e 10.08.24  
<sup>9</sup> NIQ, Total GB, val MAT w/e 15.06.24  
<sup>10</sup> Energy Audience U&A, May 2022, weighted base: 6,531 Consumers, GB, BE, DE, SP, SW, FR, NO  
<sup>11</sup> NIQ, Total GB, vol & val MAT w/e 15.06.24  
<sup>12</sup> NIQ, Total GB, val MAT w/e 15.06.24




# MAKE YOUR SALES FLY WITH FLAVOURED ENERGY FROM MONSTER.

Flavoured energy drinks have been the biggest driver of energy category growth over the last two years.<sup>1</sup>

The energy category is now worth £2 billion and Monster is powering this growth, delivering almost half of total value growth in the last year.<sup>2</sup>

Want to add real excitement to your range?  
**Stock up now.**



 To find out more call 0808 1000 000 or email [connect@ccep.com](mailto:connect@ccep.com)



©2024 Monster Energy Company. All rights Reserved. MONSTER ENERGY®, M®, MONSTER ENERGY ULTRA® are all registered trademarks of Monster Energy Company.<sup>1</sup> NIQ, Value Sales Change V 2YA, Total Coverage, MAT to 20.04.24 <sup>2</sup> NIQ, Value Sales, Total Coverage, MAT to 20.04.24.

Franklin & Sons

# Tradition and innovation

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Brand Manager

KEY BRANDS

Franklin & Sons

It has been an great year for NPD at Franklin & Sons as the company has introduced some exciting new products to its soft drinks range, reveals brand manager Lauren Edwards. “In August 2024, we launched our refreshing Peach and Mango flavour in a 275ml format, adding a vibrant and fresh tasting option to our portfolio, just in time for summer,” she says. “Additionally, we expanded into a new product format, launching three of our most popular flavours – Elderflower, Raspberry and Dandelion & Burdock – in 250ml cans, offering these in a convenient and versatile size and making them even more accessible to consumers on-the-go.

“Looking ahead to 2025, we’re committed to driving further NPD that enhances our range, including some key flavour options that we’re confident consumers will love, continuing our tradition of innovation and high-quality offerings.”

**Versatile marketing strategy**

Franklin & Sons’ soft drinks are not only refreshing beverages but also work beautifully as food pairings and can even be used as ingredients in various recipes, notes Edwards.

“This versatility is why we’ve centred our marketing strategy around food-related campaigns, to support our products and boost brand awareness in a comprehensive way,” she says. “This includes working with influencers to amplify our social media presence through engaging campaigns, which help reach a broader, relevant audience. We’ve also run social competitions that have driven consumer engagement and built excitement around our soft drinks. In addition, we’ve secured valuable



“In August 2024, we expanded into a new product format, launching three of our most popular flavours – Elderflower, Raspberry and Dandelion & Burdock – in 250ml cans, making them even more accessible to consumers on-the-go”

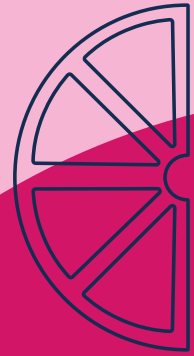
on-trade press coverage to further promote the brand within the industry. “As part of our ongoing efforts, we are sponsoring the BBC Good Food Shows Winter Christmas Kitchen in 2024, where we will be promoting, sampling and retailing our soft drinks range. This gives us the perfect platform to showcase our products pairing potential directly to consumers in a meaningful and engaging way.”

**Carefully balanced carbonation**

Franklin & Sons delivers an exciting blend of tradition and innovation, which sets it apart in the soft drinks market, adds Edwards. “The carefully balanced carbonation in our soft drinks enhances the taste, delivering a crisp and refreshing mouthfeel that elevates the drinking experience,” she says. “This, combined with our pioneering approach to flavours, brings unique and exciting options like Peach & Mango, pushing the boundaries of what consumers expect from a soft drink.

“With over 135 years of heritage, we have a deep-rooted commitment to quality and craftsmanship, which resonates with consumers seeking authenticity. For retailers, this means offering a premium, must-have product that has shelf standout, driving both interest and loyalty from customers.”

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**Pioneers of flavour**  
Since 1886

Get More Vits

# Taste without compromise

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Marketing Manager

KEY BRANDS

Get More Vits Drinks  
Get More Vits Kids Drinks  
Get More Vits Recovery  
Get More Vits  
Multivitamin Squash  
Get More Vits Multivitamin  
Chewing Gum

↙ The core mission at Get More Vits is ‘helping consumers and their families to enjoy their vitamins to stay healthy’. This underpins the company’s belief that there should be a delicious, healthy drink for everyone, regardless of life-stage or lifestyle, it says. “The tasty combinations of familiar fruit flavours – such as lemon & lime, apple & raspberry, mango & passionfruit – appeal to our consumers, whether they are new to the brand or longstanding loyal shoppers, and provide daily doses of vitamins B, C and D, among others,” it says. “The brand is increasingly available in a growing range of on-the-go and take-home packs.”

The innovative Get More Vits range comprises vitamin drinks for adults – plus a kids’ variant in a handy 330ml sports cap bottle, Recovery sports drinks to replace electrolytes and Get More Vits Fibre to aid gut health; enabling the company to help retailers as they curate functional drinks sections within the soft drinks categories to help consumers make healthier choices, it explains.

January delivered the biggest month in the company’s 11-year history, demonstrating that the brand has all year-round appeal and is not wholly reliant on a warm British summer.

Get More Vits’ hero Vitamin D Mango & Passionfruit drink, which is available in 500ml and 1L PET, as well as a 330ml sleek can, has seen such a surge across all its formats, that it has launched two new Vitamin D flavours this year – Sparkling Pineapple & Grapefruit and Still Raspberry & Pomegranate. “This is the first time the company has offered multiple flavours of one of its



“With taste central to all pieces of NPД emerging from the company, the team have recently launched Get More Vits Multivitamin Squash, made with 20% real fruit juice and containing a 50% daily dose of 8 essential vitamins”

single vitamin drinks, though these new variants remain faithful to the same winning formula of the original, offering the NHS-recommended daily dose of 10mcg per serving,” it says.

With taste central to all pieces of NPД emerging from Get More Vits Towers, the team have recently launched Get More Vits Multivitamin Squash, made with 20% real fruit juice and containing a 50% daily dose of no fewer than 8 essential vitamins in every glass. “The goal once again with this launch is to attract a mainstream audience, evidenced by the flavours on offer – Orange, Mango & Passionfruit, Apple & Blackcurrant, Summer Fruits,” it notes.

This mantra even extends to the company’s recently revitalised Multivitamin Chewing Gum, launching Peppermint and Berry flavours to freshen the breath and tantalise the taste buds of health-minded consumers.

As the range increases, so has the marketing activity, with a growing army of social media influencers supported by greater advertising spend online. Get More Vits is also venturing outdoors for the first time with a digital campaign across London throughout autumn. Key messages have centred on taste and vitamin D supplementation during the colder, darker months to support bone and muscle health, the immune system, and to help with Seasonal Affective Disorder (SAD)<sup>1</sup>.



Source

<sup>1</sup> Healthline, 2023 <https://www.healthline.com/health/depression/vitamins-for-seasonal-depression>



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could  
taste this  
**good?**



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[getmorevits.com](http://getmorevits.com)

\*Public Health England recommends a daily supplement containing 10 micrograms (mcg) of vitamin D.

Goodrays

# Aiming for the top in CBD

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Head of Marketing

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– Sparkling Raspberry & Guava  
– Sparkling Blood Orange & Grapefruit  
– Sparkling Elderflower & Yuzu  
**Goodrays CBD Gummies**  
**Goodrays CBD Oil**

↙ CBD specialist Goodrays’ mission is to become “not just a fast-growth product but also the go-to community that inspires people to improve their mental wellbeing by introducing quality CBD into their everyday life”, explains head of marketing Richard Pilbeam. “For this, we focus our marketing on the all-natural ingredients and premium quality of our product, but also what we stand for and how we are enabling people to improve both their mental and physical wellbeing.”

Goodrays’ founder Eoin Keenan experienced anxiety in his twenties, leading to insomnia and other physical symptoms. Discovering CBD was a game-changer for him, he has since dedicated his career to understanding the plant, the benefits and the science. “Very few people in the world have spent as long as he has working in the industry,” says Pilbeam. “This gives us real credibility and authenticity as a brand – a strong differentiator from our competitors.”

**Premium product**

Each can of Goodrays – in four different flavours (see side panel) – contains a market-leading 30mg of CBD, a daily dose of Vitamin D, no artificial ingredients, no added sugar, is 100% vegan and comes in at 33 calories per can.

“Goodrays will always work with the best suppliers in the world – the most premium, most sustainable hemp growers in Colorado and California



“Our mission is to enable and inspire people to improve their mental wellbeing by introducing CBD into their everyday life”

with absolutely no shortcuts when it comes to quality,” he adds.

The most recent SKU introduced is the mixed flavour pack, which is completely plastic-free and recyclable. This came onto shelves just over a year ago, launching into Waitrose initially and then into Sainsbury’s. “It’s our best-performing CBD SKU in retail: a great way to introduce customers to the benefits of CBD drinks in a convenient format, as well as being able to introduce all four flavours in one go,” says Pilbeam. “We are committed to providing consumers with a product that is good for people and the planet and the feedback has been exceptional thus far.”

**Community minded**

Marketing works in line with FSA regulations<sup>1</sup>, for example partnering with people and brands which mirror its mission and donating to relevant causes, he notes. “We’ve found our community by not being able to use traditional marketing methods and it is that community that will ensure the longevity of Goodrays. In spite of these headwinds, Goodrays has grown rapidly, which is a testament to the strength of our company and product.”



<sup>1</sup> For an update on the progress of the novel food application, please read the following: <https://tinyurl.com/3xrwjm43>



GOODRAYS

# The UK's fastest growing CBD drink\*




30MG OF  
SCIENCE-BACKED CBD

100% NATURAL  
INGREDIENTS

LOW SUGAR &  
LOW CALORIES

WAITROSE  Sainsbury's 

\*Nielsen 52wk MAT Total Coverage/GB we 07/09/24 vs YA

 MADE IN THE UK

## Hip Pop

# Net positive for gut health

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### KEY CONTACTS

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Head of Sales

### KEY BRANDS

**Hip Pop**  
- Kombucha  
- CBD Kombucha  
- Gut Lovin' Soda  
- Living Soda

↙ Hip Pop is a functional drinks brand offering a variety of vegan-friendly, low-sugar and non-artificial kombuchas and sodas that “do good as well as taste good”, says the company. “In May, we expanded our best-selling Kombucha range at Sainsbury’s with the exotic Passionfruit & Guava CBD Kombucha. This vegan-friendly, non-artificial functional drink is infused with 15mg CBD to support balance and wellbeing and, like all our products, is both delicious and gut loving,” it notes.

“This year, to celebrate the British summer, we launched a limited-edition Strawberries & Cream flavour of our best-selling kombucha, in partnership with supermarket Booths.

“All Hip Pop drinks are created to taste great and be positive for gut health. Our entire range is 100% natural and low in calories, and our Living Sodas are packed with apple cider vinegar and a quarter of your daily fibre per can,” it adds. “Similarly, our Gut Lovin’ Sodas



“We want to be a force for good in the carbonated drinks market”

are infused with chicory root fibre, while our Kombucha contains probiotic living cultures to support gut health.

“Our accessible package covers a gap in the market for those needing gut health support with no compromise on taste. We want to be a force for good in the carbonated drinks market and provide delicious and healthy alternatives to traditional soft drinks.”

# HIP POP®

GUT LOVIN' DRINKS



GUT LOVIN'

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## WOW HYDRATE

# Revolutionising on-the-go collagen

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Head of Wholesale

### KEY BRANDS

**WOW Collagen**  
• **20g Protein:**  
– Summerfruit  
– Tropical  
• **10g Protein**  
– Summerfruit  
– Tropical  
**WOW Electrolyte**  
• **Electrolyte PRO**  
– Blue Raspberry  
– Red Cherry  
• **Electrolyte**  
– Lemon and Lime  
– Orange

As the collagen market continues to grow in popularity, Wow Hydrate is changing the game by introducing a revolutionary solution for those seeking functional, on-the-go options.

“With limited convenient collagen ready-to-drink options available, Wowhydrate is proud to be leading the charge with its water-based, collagen-infused beverages.

“Available in two refreshing flavours, our drinks deliver 10g (50 calories) or 20g (85 calories) of collagen, helping consumers meet their protein goals while also providing essential hydration, vitamins, and BCAAs for optimal health,” says Georgia Hunt, head of sales at the company.

### Hydration throughout the day

“At Wow, we are committed to creating drinks that not only support consumer health but help maintain a healthy lifestyle no matter what they do in



“Our collagen drinks boost consumers’ collagen intake and keep them hydrated”

their day-to-day life,” she notes. “Our collagen drinks boost consumers’ collagen intake and keeps them hydrated throughout the day – which is perfect for those with busy, active lifestyles.

“For those consumers who are ready to wow their wellness routine, Wowhydrate is their ultimate on-the-go companion.”

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WATER MEETS SCIENCE



## Mockingbird Raw Press

# Mockingbird takes flight

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**Hannah Landon**  
Co-Founder  
**Steve Brimacombe**  
Head of Sales

### KEY BRANDS

**Mockingbird Raw Press Smoothies**  
– Raw Greens  
– Raw Defence  
– Raw Boost  
– Raw Vitalise  
– Raw Glow  
**Mockingbird Raw Press Juices**  
– Raw Activate  
– Raw Pump  
– Raw Shield  
– Raw Lift  
**Mockingbird Raw Press Shots**  
– Raw Ginger  
– Raw Gut

Mockingbird Raw Press, the award-winning juice & smoothie brand, is on a mission to ignite a raw revolution by bringing the same high quality of ingredients and the great taste of freshly made smoothies and juices available on the high street, into a ready-to-drink format suitable for grocery.

The past year has been huge for the brand, says co-founder Chris Laidlaw. “We successfully extended beyond our high-performing smoothie range into both the juice and shots categories, as well as entering into grocery meal deals with our 250ml ‘to-go’ format, with more exciting plans in the pipeline for the upcoming year.”

Since launching four years ago, Mockingbird Raw Press has achieved over 24,000 distribution points across the UK and Ireland, and is listed in all major grocers. The smoothie category is seeing continued momentum, with Mockingbird Raw Press the No.1 contributor to category growth<sup>1</sup>, attracting a highly incremental audience that drives penetration, notes Laidlaw. “We’re engaging with a new consumer who previously didn’t shop the fixture,” he says. “By bringing the raw, natural credentials of the high street alongside exciting flavours and functionality, we are re-awakening the possibilities of the category.”

Mockingbird Raw Press’ signature smoothie Raw Greens is the No.1 selling smoothie in Co-op, Sainsbury’s and Waitrose<sup>2</sup>, he adds.

Building on the success of the brand’s smoothie range, Mockingbird’s Functional Juice range, available in four delicious flavours, has rolled out across the market and are available in Waitrose, Tesco, Sainsbury’s and



“Our unique processing techniques, alongside our carefully crafted recipe blends, which include up to 23% vegetables, make us the leading brand in the category for providing a healthier alternative that we know consumers are actively looking for”

Co-op, with strong early performance. In Tesco, Mockingbird has gained 30% market share in the last 12 weeks with Shield the No.2 SKU in functional juice<sup>3</sup>. Mockingbird has also entered into the rapidly growing shots category with a Raw Ginger Shot and Raw Gut Shot, both available in Waitrose in a convenient dosing bottle format.

### The Mockingbird difference

Mockingbird Raw Press utilises non-thermal processing techniques – cold-pressing and small-batch high-pressure processing – enabling the brand to better protect the nutritional integrity of its raw fruit and vegetables for superior taste and health credentials. “Our unique processing techniques alongside our carefully crafted recipe blends, which include up to 23% vegetables, make us the leading brand in the category for providing a healthier alternative that we know consumers are actively looking for,” says Laidlaw.

### Marketing support

Building on its successful outdoor campaign, Mockingbird Raw Press is driving brand awareness with a £1m campaign live this year, comprising outdoor media, digital, social, sampling and in-store shopper activation.

### Source

<sup>1</sup> Nielsen, Smoothies, Total Coverage, MAT to 07.09.24  
<sup>2</sup> Nielsen, Branded Smoothies, 750ml, Cash Rate of Sale, Data 12 wks to 07.09.24  
<sup>3</sup> Nielsen, Tesco, Functional juice, Data to 25.08.24

# THE No. 1 RAW SMOOTHIE BRAND\*



\*Source: Nielsen | Total Coverage | Smoothies | Data MAT to 07.09.2024



MOJU

# Add a potent punch to the day

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Marketing Director  
**Noel Dalton**  
Sales Director

KEY BRANDS

- MOJU Ginger Vitality Shot**  
– 60ml shot+ and 420ml dosing bottle++
- MOJU Turmeric Vitality Shot**  
– 60ml shot and 420ml dosing bottle
- MOJU Extra Strength Ginger Vitality Shot**  
– 60ml shot and 420ml dosing bottle
- MOJU Hot Mango Immunity Shot**  
– 60ml shot and 420ml dosing bottle
- MOJU Multi-Berry Mango Immunity Shot**  
– 60ml shot and 420ml dosing bottle
- MOJU Raspberry Prebiotic Gut Health Shot**  
– 60ml shot and 420ml dosing bottle
- MOJU Tropical Prebiotic Gut Health Shot**  
– 60ml shot and 420ml dosing bottle

+RSP £2.00  
++ RSP £5.99

Moju, the UK's No.1 functional shot brand<sup>1</sup>, is spicing things up this autumn/winter with both a range extension and new product added to its fiery line-up. Moju's fieriest kick, Extra Strength Ginger, is now available in a hyper-convenient 60ml shot format offering consumers the opportunity to add some more boom to their routine wherever they go, says marketing manager Stephanie Case.

"Moju's Immunity range will also be getting a spice-up with the launch of a new variant hitting shelves and online this winter; the offer promises to deliver a sweet and spicy balance of flavours, cold-pressing a tasty hit of juicy fruit and fresh roots for a natural immune supporting kick," she says.

### Multichannel campaign

To support the brand's hero variants, Moju has recently launched its latest multichannel campaign. Investing £2m across a 17-week period, the campaign is estimated to be seen by 85% of UK adults, bringing Moju's distinctive boom to an additional 17.5m million consumers vs last year's campaign.

Further cementing Moju's association with the morning occasion, the brand has expanded into new channels with TV spots running across ITV and Sky, alongside Channel 4, plus making its debut on radio with its first airtime ads.

Building on the award-winning 'Wake Shake Boom' creative platform, Moju continues to shake up the market with bold and memorable advertising, says Smith. The punchy three-word mnemonic is designed to help consumers develop a daily morning ritual that's easy to keep. Using the cuckoo clock, and the



“Moju's fieriest kick, Extra Strength Ginger, is now available in a hyper-convenient 60ml shot format, offering consumers the opportunity to add some more boom to their routine wherever they go”

brand's infamous 'shot face' reaction, the TV campaign aims to dramatise the uniquely craveable product experience that is 'so good, you can feel it working'.

### Naturally functional ingredients

Moju prioritises nutrient-rich, whole-food and freshly pressed ingredients, including a big dose of naturally functional ginger and turmeric to support consumers' overall health, energy levels and immunity.

"Moju gives consumers the freshest, most invigorating flavour experience through its balance of spicy roots and sweet flavours," says Case. "The brand's hero Ginger variant contains 13.8g of fresh-pressed Peruvian ginger, with the 420ml having the No.1 repeat rate in juices and smoothies<sup>2</sup>."

With 40% of UK consumers reducing their juices and smoothies intake due to sugar concerns<sup>3</sup>, two-thirds are also looking to remove ultra-processed foods from their diet<sup>4</sup>, and one-third have cut down their caffeine intake due to health concerns<sup>5</sup>. Moju shots are naturally caffeine-free and a low-in-sugar alternative for health-conscious consumers who are seeking a potent punch to kickstart their day.



Source

<sup>1</sup> Circana Total Market UK & NI, Volume Sales, 52 w/e 04.8.24  
<sup>2</sup> Circana Total Market UK & NI, EWtd  
<sup>3,5</sup> Vypr, Consumer research commissioned by MOJU, 2024



# MOJU®



**THE UK'S**  
**#1**  
**FUNCTIONAL**  
**SHOTS BRAND**

Sources: 1. Ciriona Total Market UK & NI, Volume Sales, 52 w.e. 07.24;  
2. Kantar Total Market, 52w & 12w to 9.6.24; 3. Ciriona Total Market UK & NI, FWD RDS, MAI w.e. 07.24 (WD 15.6 w.e. 9.3.4); 4. Ciriona Total Market UK & NI, Value Sales, 52 w.e. 09.6.24

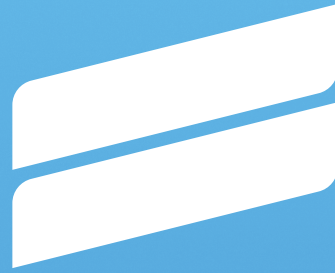
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Purity Soft Drinks

# Punchy progress for Purity

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 CEO

KEY BRANDS

Juice Burst  
 firefly

2024 has been a year of growth and innovation for Purity Soft Drinks, makers of leading juice brands Juice Burst and firefly, reports CEO Sarah Baldwin. “In recent months Juice Burst has grown over six times faster than total soft drinks and total drink now (on-the-go drinks),” she says. “This summer saw the introduction of attached caps across the entire Juice Burst range, ensuring its caps can be recycled with the rest of the packaging while removing the previous foil seal – making Juice Burst 100% recyclable and reducing foil packaging waste by 10 tonnes annually.”

The consumer trend towards natural and health sees no sign of waning, and this is something that Juice Burst has been building towards for a long time, she notes. “Not only offering a 100% HFSS-compliant range and landing a strong NPM (Nutrient Profile Model) score, the Juice Burst range is proud to be focusing on natural and healthier drinks with the vibrant taste of real fruit. Continuing to build for the long-term, Juice Burst is growing distribution and experiencing an increase in popularity for apple juice drinks.”

**Punchy To The Core**

Juice Burst Apple is leading the charge, seeing unit growth of 9.1%<sup>2</sup> in recent months and is the No.1 apple juice SKU in drink now<sup>3</sup>. “Like all Juice Burst flavours, Juice Burst Apple is HFSS-compliant, with no added sugar or artificial flavourings, and contains one of your five-a-day in every bottle,” says Baldwin.

“This year we capitalised on the apple trend by launching Juice Burst’s biggest marketing campaign yet: ‘Punchy To The Core’. The campaign reached over 30 million UK adults and was seen 174 million times through social and digital activity, nationwide sampling, and out-of-home advertising including thousands of bus t-sides and phone kiosk adverts across 21 major UK cities – keeping the punchy taste of Juice Burst Apple front of mind for shoppers throughout the summer months.”



“Following popular demand, Juice Burst Peach Ice Tea is expanding into a larger format”



**Flavour trends**

In addition to the trend towards apple, Purity Soft Drinks has reported a significant boost in the ‘peach ice tea’ flavour category.

Following popular demand, this month the brand’s latest NPD Juice Burst Peach Ice Tea is expanding into a larger 500ml format. “Since launching in August 2023, Juice Burst Peach Ice Tea has already risen to become the brand’s second-biggest 330ml SKU,” she adds. “A refreshingly sweet blend of peach juice and black tea flavouring, our latest innovation contains more fruit juice than any other SKU in the growing tea-flavoured juice market<sup>4</sup>.”

“In line with our wider Juice Burst range, Juice Burst Peach Ice Tea offers a healthier, juicier option for enjoying on-trend flavours, and will now be more accessible than ever with the launch of a larger format.

“So, over the past 12 months Juice Burst has invested in its biggest-ever marketing campaign, introduced new on-trend flavours, new format sizes, and has become 100% recyclable, while already being fully HFSS-compliant. This continually evolving brand is helping to future-proof the category.”

Source

<sup>1,2</sup> IRI EXT Marketplace, Unit Sales, 12 w/e 12.05.24  
<sup>3</sup> IRI EXT Marketplace, Value Sales, 52 w/e 04.08.24  
<sup>4</sup> IRI EXT Marketplace, Data 16.04.23 (when compared to what is already available from UK brands within retail)

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JUICE  
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FASTER  
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\*Source: IRI Ext Marketplace | Drink Now Fruit Juice | Value Sales | Aug 24. \*\*Source: IRI Ext Marketplace | Value Sales Juice Burst Apple 500ml | 52 wks to Aug 24. \*\*\*Source: IRI EXT Marketplace | Apr 24 (when compared to what is already available from UK brands within retail).

\*\*\*\*Source: Retailer X | Units Sold | 330ml Range | 28 Wks to 15th Jul 24.

Refresco Drinks UK

# Refreshing drinks brands

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 Head of Marketing

KEY BRANDS

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- Emerge
- SUSO
- MacB
- Old Jamaica Ginger Beer
- Sunpride
- Ben Shaws
- Welch's
- Mr Freeze
- Jubbly
- Del Monte
- Sunny D
- Cherry Good
- Um Bongo
- Libby's

↙ In the fast-evolving beverage market, Refresco continues to lead with its key brands: Del Monte, Suso and Emerge, says Sarah Zawodny, head of marketing at the company. “Each brand innovates to meet consumer demands for value, wellness and taste,” she says. “These brands are set to make a strong impact in 2025 by addressing distinct market needs.”

Del Monte is delivering significant results with its larger-format packs – particularly popular for family occasions, gatherings and meal prepping – and appealing to consumers who prioritise quality and affordability, notes Zawodny. “Del Monte’s larger packs have been a hit with shoppers seeking cost-effective yet premium choices,” she says. “With five popular flavours already available, Del Monte is developing a sixth to launch in 2025, showing its commitment to continuous innovation and consumer satisfaction.”

Suso has expanded its range of vibrant, fun drinks designed to appeal to children and teenagers while staying true to its wellness positioning, she reveals. “The launch of Suso juice cartons in 2024 aims to provide compact drinks that are one of your five-a-day. Created with younger audiences in mind, they’re perfect for school lunches and meet parents’ needs for on-the-go options that taste great,” explains Zawodny. “Offered in fun packaging, these drinks allow children to enjoy a tasty option that contributes to their daily fruit intake, while Suso’s 250ml carbonated drinks offer older children and teenagers



“Del Monte, Suso and Emerge are set to make a strong impact in 2025 by addressing distinct market needs”

a lightly sparkling alternative to traditional soft drinks. “This growing engagement from younger consumers, particularly teens, and the brand’s ability to cater to various occasions show Suso is now a lifestyle choice for families focused on wellness,” says Zawodny.

Emerge is making strides in the growing isotonic drinks market, gaining momentum with its Emerge Sport range, she adds. The brand’s partnership with Tough Mudder UK has increased consumer awareness, positioning it as a top choice for fitness enthusiasts. “Emerge is experiencing strong momentum. Enriched with B vitamins and electrolytes, our Sport range is designed for both hydration and recovery, making it a favourite among active consumers,” she says.

Emerge’s success is further boosted by flavour innovations, including Strawberry & Watermelon, and a limited-edition Mango & Passionfruit. The brand is also using 30% recycled materials in its packaging, reflecting growing consumer demand for environmentally friendly products.

With continuous innovation and a focus on value, wellness and performance, 2025 looks set to be a breakthrough year for Refresco.



# Refresco

our drinks on every table

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label drinks across  
the category



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## Starbucks Coffee

# New festive multiserve

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Marketing Director  
EMEA, Starbucks  
**Adam Hacking**  
Head of Beverages, Arla

### KEY BRANDS

**Starbucks® Multiserve**  
– White Chocolate Mocha – **NEW**  
– Skinny Latte  
RRP £3.75

**Starbucks Chilled Classics®**  
– Caffè Latte  
RRP £2.00

**Starbucks Frappuccino®**  
– Mocha  
RRP £2.10

 Innovation within the Starbucks chilled coffee portfolio has been a fundamental driver of brand performance. The brand is No.1 in the ready-to-drink (RTD) chilled coffee category<sup>1</sup> and is now worth £145m, accounting for a 52.7% share of the category<sup>2</sup>.

### Festive favourite returns

In its latest innovation, a Starbucks chilled coffee festive favourite is making a big comeback with a new shareable twist. The delicious Chilled Coffee classic, Starbucks White Chocolate Mocha, will be available nationwide from November for a limited time while stocks last in a 750ml Multiserve format. Starbucks White Chocolate Mocha Chilled Coffee Classic is a Starbucks coffeehouse original, blending bold espresso and creamy milk with a gentle hint of white chocolate.

### Multiserve success

The festive release builds on the award-winning, large-format Starbucks Multiserve chilled coffee range which has brought new consumers to the RTD chilled coffee category and expanded consumption<sup>3</sup>. Such is the demand for larger formats, Starbucks Chilled Classics Skinny Multiserve was voted Product of the Year 2024 and Starbucks chilled coffee is the fastest-growing brand in the multiserve format<sup>4</sup>, increasing 138% year-on-year<sup>5</sup>.

Starbucks White Chocolate Mocha Multiserve Chilled Coffee is wrapped in the iconic and instantly-recognisable Starbucks festive packaging. It is the newest addition to Starbucks'



### Source

<sup>1-5</sup> Kantar/Nielsen Data, Total Market inc Discounters, 52 w/e 27.01.24



**“Starbucks White Chocolate Mocha will be available nationwide from November for a limited time while stocks last, in a 750ml Multiserve format”**

popular ready-to-drink festive range, which includes favourites such as Starbucks Caffè Latte and Starbucks Frappuccino Mocha.

### Popularity of larger formats

Charlotta Oldham, marketing director EMEA at Starbucks, says: “The White Chocolate Mocha flavour is a long-time fan favourite and has become a staple of the festive season to be enjoyed both on-the-go and at home. The new 750ml serving size taps into the popularity of larger formats to allow consumers to share even more moments of connection with family and friends over coffee.”

The new Starbucks White Chocolate Mocha Multiserve will be available in Asda and Sainsbury’s for a limited time from November. The recommended retail price is £3.75.



# THE UK'S NO.1 CHILLED COFFEE\*



\*Nielsen 13/07/2024



Suntory Beverage & Food GB&I

# Bringing the energy

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 Sales Director GB

KEY BRANDS

**Lucozade Energy**  
**Lucozade Sport**  
**Lucozade Alert**  
**Blucozade**  
**Orangina**  
**Ribena**

↙ Suntory Beverage & Food GB&I introduced Lucozade to a new era this year, with unique new drinks, expansion into smaller can formats and an exciting brand relaunch to help retailers bring the energy to their soft drinks sales.

**Once in a blue move**

Lucozade brought something new and blue to chillers earlier this year with Blucozade. Three new drinks hit shelves in February – Lucozade Sport Blue Force, Lucozade Energy Blue Burst and Lucozade Alert Blue Rush – with a unique flavour for each drink.

The launch of Blucozade was a real milestone for the company, as it was the first time that all three Lucozade sub-brands appeared side by side in a single launch, with new drinks across function, flavour and format. Blucozade presents a key opportunity for retailers to brand-block, creating an unmissable eye-catching display for shoppers.

**Lucozade’s biggest relaunch**

Uniting Lucozade’s Sport, Energy and Alert brands together for the first time with Blucozade was a huge step-change in how the brand is marketed and it set the scene for its new masterbrand identity.

‘Bring the Energy’ is about how Lucozade helps motivate people to rise to the challenge and to move with energy in the moments that matter to them. The unifying brand platform was developed following two years of in-depth research which involved speaking to over 6,000 consumers and which found that shoppers do not separate the different Lucozade drinks but view them all simply as ‘Lucozade’, reveals the company.

As part of the brand relaunch, SBF GB&I also redesigned Lucozade’s packaging including an updated logo to capture the positive and energising essence of Lucozade on-shelf.

**New can format**

The energy drinks segment is seeing a strong demand for smaller cans, it adds. “We know that 31% of



“Blucozade’s launch helped to set the scene for a new masterbrand identity”



stimulation drinks are now sold in 250ml cans<sup>1</sup>, and this smaller format is particularly popular with shoppers over 25 years old<sup>2</sup>.”

To capitalise on this growing trend and to help retailers unlock new shopper demographics, SBF GB&I recently launched Lucozade Alert Ultimate Energy and Lucozade Alert Zero Sugar Mango Peachade in 250ml cans. Lucozade Alert Ultimate Energy, in a great-tasting guarana flavour, is a brand-new addition to the Alert range; while the Zero Sugar Mango Peachade 250ml can brings this successful zero-sugar flavour to this increasingly popular smaller format.

The two launches were specially developed to attract new shoppers to the category by bringing the right taste in the right format to retailers’ chillers. When surveyed, half of stimulation drink shoppers said they’d prefer a smaller can<sup>3</sup>, highlighting the consumer demand for this more permissible format and the importance of having a range of format options in the chiller to suit all preferences and occasions within the category.

Source

<sup>1</sup> Nielsen, Total Coverage incl. Discounters, 52 w/e 13.04.24  
<sup>2</sup> Kantar data, 2024  
<sup>3</sup> The Work Perk data resulting from Sampling Campaign Questionnaire (n=113,52 cans for Alert sampled)

# NEW 250ML CANS

STOCK 2 EXCITING FLAVOURS



**VITAMIN B3 HELPS REDUCE TIREDNESS**

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\*Nielsen, T. Coverage incl Discounters, T. Simulation Energy, £ Value Share by Pack Size, MAT to 06.04.2024. \*\*Recommended Retail Price

  
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