

Soft drinks

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functional squash
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Nichols
The home of **ViMTO**

WE MAKE LIFE
taste BETTER

Vimto and Wonderfuel are registered trade marks of Nichols plc.
*NielsenIQ RMS Squash Category for the 12 months ending 6.9.25
for the Total Coverage Market.

Fresh thinking for drinking

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Placing the consumer at the heart of decision-making is essential for sustainable growth in soft drinks. By innovating around key category drivers and leveraging trusted brands, businesses can secure long-term success. This is the view of Nichols, home of the iconic Vimto brand.

Despite rising living costs, the UK soft drinks market is resilient, up +6.4% in value and +4.1% in volume¹. “Consumers are voting with their wallets for brands that bring reassurance and innovation,” says Angela Reay, marketing director at Nichols.

Enhancing body and mind

Wellbeing is a major trend shaping the category. Two-thirds of consumers say they’d prefer a drink with health benefits over a supplement with the same function², reveals Reay. “Nichols predicts products that ‘enhance body & mind’ will be the biggest growth driver in soft drinks by 2030³,” she says.

The company’s latest launch, Vimto Wonderfuel, is the UK’s first functional squash for the breakfast occasion and has been shortlisted in The Grocer’s 2025 New Product Awards. Supported by a £1.2m campaign, Wonderfuel is high in vitamins B, C & D, a source of iron and zinc, and contains no added sugar – delivering affordable, everyday nutrition at only 17p per serving.

Vimto Energy also showcases Nichols’ wellness innovation. With low



“Vimto Wonderfuel is the UK’s first functional squash for the breakfast occasion. It is high in vitamins, a source of iron and zinc, and contains no added sugar – delivering affordable, everyday nutrition at only 17p a serving”

sugar, natural caffeine, vitamins B6 & B12, and real fruit juice, it appeals to the 43% of energy drink buyers seeking more natural ingredients⁴. Strong blind taste test results further underline its growth potential⁵.

Elevating enjoyment

Another of Nichols’ category growth drivers is ‘elevating enjoyment’, delivered through bold brand activation. In 2025, the ‘Love the Taste’ campaign returned with greater reach, distributing over 36m promotional packs across squash, carbonates, juice drinks, flavoured water and Vimto Energy. Backed by a £3.5m media plan across out-of-home, digital, cinema, VOD, and in-store, the campaign gave millions of consumers a risk-free chance to discover Vimto.

“With brand value at £125m⁶ – the highest in our history – Vimto is stronger than ever,” says Reay.

Looking ahead

Future growth will come from portfolios that balance health-led and enjoyment-led propositions, notes Reay. “By staying close to consumers, innovating boldly, and celebrating quality and flavour, we are confident Vimto will remain central to category success,” she says. “Our strategy is clear: unlock growth by putting consumers first and delivering the iconic Vimto taste experience. This is how we’ll continue to inspire, excite, and deliver value for years to come.”

Source

¹ NielsenIQ, RMS data for the Soft Drinks category, Total Coverage Market, 12 months ending 09.08.25

² Mintel, UK Soft Drinks Review, June 2025

³ Nichols Bespoke Research, ‘Growth Platform Update’, The Forge June 2025; & Nichols Bespoke Demand Space Overlay Update, Worldpanel, July 2024

⁴ Mintel, UK Sports & Energy Report, June 2023

⁵ Wirral Sensory Services, July 2025

⁶ Nielsen IQ RMS data for the Squash, Flavoured Carbonates, RTD Still, Flavoured Water and Energy categories, GB Total Coverage, 12 m/e 09.08.25



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Analysis

A sense of purpose

More energy, more immunity, healthier – but still with all the taste and refreshment, soft drinks have become a tall order for suppliers and retailers alike

➔ The overall size of the soft drinks category is now a matter of perspective. If you are to include dairy drinks, coffee, tea and anything liquid that is non-alcoholic, then we're talking in terms of a category worth over £20bn in the UK – in short, vast. However, it's all depends on the angle from which suppliers and retailers are looking at the market. So, 'soft drinks category' as a definition can mean many different things to many people.

Traditionally, the category has been driven by carbonated soft drinks, which still hold sway in the market. But consumer demands are changing rapidly and the boom in functional beverages – whether for energy, health or simply hydration – is undeniable. What retailers have to contend with, however, is the headache presented by the sheer variety of options available

and identifying what their particular consumers are seeking.

The soft drinks category continues to show strong growth and is currently up 5.3% in volume and 6.7% in value over the past year¹," says Alpesh Mistry, sales director at Suntory Beverage & Food GB&I. "This growth is being driven by the likes of sport, stimulation, functional, iced drinks and water.

"With several soft drinks segments currently showing strong growth, consumers are still turning to the category for refreshment, hydration or functionality," he adds. "Sports drinks, in particular, are currently seeing very strong performance with +11.4% volume growth year to date², led by strong double-digit growth from Lucozade Sport (+30.8%³). The energy segment also shows strong overall

growth, led by stimulation and is now worth over £2bn⁴."

Total soft drinks has grown by +7.3% in value and +4.8% in volume over the last 12 months⁵, says Angela Reay, group marketing director at Nichols. Energy and flavoured water are the fastest-growing sectors, with value up +11.9% and +13.3% respectively⁶, while energy remains the top contributor to absolute growth, adding +£251m year on year⁷.

"While it's true that consumers are more cautious with their spending... people are still willing to invest in brands that make their lives easier or enhance everyday moments," she adds.

At Coca-Cola Europacific Partners GB (CCEP), Rob Yeomans, VP commercial development, highlights the fact that 98% of households in Great Britain have enjoyed soft drinks over the past



Hydration focus boosts the appeal of water to shoppers

With consumers prioritising hydration more than ever, premium flavoured sparkling water is now the second-fastest growing category after gut health drinksⁱ, says Cawston Press MD Steve Kearns. The company is focused on the trend for healthy hydration with its range of drinks for kids, Fruit Waters, containing just pressed fruit, fruit puree and water, he notes.

The water category has been the standout performer in soft drinks over the past year, growing at +15% versus last year – faster than any other categoryⁱⁱ, maintains Terri Cooper, sales & marketing director at Aqua Pura. “Despite food inflation pressure, consumers are buying more, and the value of their purchase is also rising as they look for ‘healthier’ hydration,” she says. “Since Q3 last year, the water category has delivered four consecutive quarters of volume growthⁱⁱⁱ.”

“While around 10% of category volume now comes from flavoured waters, plain still water is leading growth at +15%^{iv},” she adds. “We see consumers going ‘back to basics’ and being drawn to ‘natural’ options, which aligns with growing scrutiny over sweeteners and ultra-processed ingredients.”

Even amid a cost-of-living squeeze, premium bottled and flavoured waters led the charge in the UK soft drinks, proving that consumers continue to prioritise healthy hydration even as budgets tighten, says Alina Balatchi-Lupascu, PR & trade comms director at Aqua Carpatica. Highlighting healthy hydration and great taste have been key to keeping sales momentum strong, she notes.

Hydration remains one of the key drivers in soft drinks, and while consumers bought slightly less water in 2024 than in 2023, total functional water is where the growth is, highlighting an opportunity for retailers^v, maintains AG Barr chief commercial officer Dino Labbate. “With just 3% of households buying into this segment^{vi}, there’s huge headroom for further growth,” he says. “Within water, shoppers are increasingly gravitating towards brands, preferring

them to own label. Branded water now accounts for 76% of value sales^{vii} as consumers increase consumption for health reasons, but in a way that still delivers on flavour and enjoyment.”

The coconut water category globally is now worth US\$3bn and is forecast to grow 20%^{viii}, notes Tim Rees, MD EMEA at All Market Europe, distributor of the Vita Coco brand. He says: “Coconut water is no longer niche – it’s one of the fastest-growing categories in global soft drinks,” he says. “What’s most exciting is that this growth is coming from every part of our portfolio and from all regions, proving that consumer demand for natural, functional hydration is stronger than ever.”

Hydration is a lifestyle priority, adds Rees. “Consumers increasingly seek natural, healthier ways to stay hydrated, not only during sport and exercise but as part of their everyday routines,” he notes. “#Watertok now over 220m views as hydration becomes part of daily self-care and, with functional accounting for 25% of chilled juice and smoothies RSV^{ix}, 56% of functional health category buyers^x buy coconut water to ‘stay hydrated naturally’.”

“Hydration remains one of the key drivers in soft drinks and total functional water is where the growth is”

year⁸. The cola sector in GB is now worth £2.88bn, with the Coca-Cola portfolio accounting for 69.3% of that value⁹, he says.

Notably energy drinks continue to be the standout performer in the market, with volume sales rising¹⁰. “Our long-term vision projects the energy category to reach £3bn by 2030¹¹,” he adds. One of the biggest drivers in energy is its broadening appeal to a much wider audience and with women now making up 49% of energy drink shoppers¹² compared to only 40% back in 2022¹³. “This shift has been accelerated by a wave of flavoured innovation that caters to different tastes, lifestyles and consumption occasions,” he notes.

At Refresco, senior category & innovation manager Donna Mackay notes that concern over finances

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continues to shadow the market, forcing consumers to look for ways to manage their spend, whether it be staying at home or simply buying less. “When they do make the decision to purchase a drink, they are looking for products that can bring excitement, but at affordable price,” she says. “We have seen the increase in demand for choice across soft drinks, consumers want new flavours and colour and we’re seeing more of that across the fixture.”

The soft drinks category continues to be a key profit opportunity for retailers, with consumers buying more than 750 brands and almost 9,000 SKUs¹⁴, says AG Barr chief commercial officer Dino Labbate. “As consumers continue to look for an everyday treat, carbonates remain the largest and most-shopped soft drinks category, valued at £4.3bn¹⁵, with 99% of the population buying a soft drink in a year¹⁶. On average they buy a soft drink more than once a week¹⁷, underlining the importance and popularity of the category.”

The low-calorie carbonates sector is performing particularly well in soft drinks, reflecting changes in legislation and shopper needs, observes Labbate. “Once an option for soft drinks, low-calorie carbonates are now a necessity, accounting for approximately 50% of all carbonates sales¹⁸,” he says.

Despite growing consumer caution around spending, the soft drinks category has remained resilient, growing 7.3% in grocery over the last year¹⁹, says Ben Parker, VP sales – off trade at Carlsberg Britvic. He notes that the company has had to adapt its portfolio to keep up with trends in the market and ensure it meets a range of shopper demands and needs. Part of this has been engaging with younger shoppers and understanding what they want from their soft drinks choice. To that end, it has expanded into “high-growth areas particularly around functional health” with its Plenish and Lipton Kombucha brands, he says.

While chilled juice remains a major sector, with retail sales worth £1.5bn, a recent +5.7% growth in value masks a -5.4% decline in volumes²⁰, says Moju marketing director Jon Marchant. ‘Not from concentrate’ juice makes up 48% of chilled juice sales²¹ and sales of naturally functional drinks continue to strengthen as awareness and appreciation of their value builds²². “These products are not only driving

Functional and energy ride the wave of popularity

Energy drinks have remained resilient in the changing face of consumer confidence, growing at 7.6%^{xi}, says Paul Coppin, VP marketing EMEA at Nutrabort, owner of the C4 Energy brand. “The category continues growing, driven by flavour, low-calorie drinks and a new wave of functional energy drinks with natural ingredients,” he notes. “The foundation of the category remains traditional stimulation drinks. However, more brands are launching into the functional space, driven by evolving consumer needs – regulation of sugar and trusted ingredients – but the category must still deliver on taste and efficacy, as these remain the biggest drivers of choice.”

The energy market is continuing to go from strength to strength, now worth over £3bn, with sales up by +9.2% YoY^{xii}, says AG Barr’s Labbate. “We’re seeing a growing opportunity for retailers to drive spend, with 70% of consumers now saying they are willing to pay more, creating incremental

opportunities and chances to trade them up^{xiii},” he notes. “The winter months are an especially important time for energy drinks, with busy schedules driving shoppers to the category. Nearly half of festive Brits (47%) feel December is more exhausting than any other month due to their packed social calendar^{xiv}.

“Meanwhile, although 60% of shoppers say they plan for food and drink, one in five say they do buy unplanned items^{xv},” adds Labbate. “This demonstrates that consumers are increasingly open to disruption in store this winter with a compelling and enticing range of energy drinks that meets their needs.”

Gut health and functional wellness are booming, with shoppers looking for specific health benefits like fibre, where 96% of UK adults are failing to meet the recommended target of 30 grams a day^{xvi}, observes Alex Petrogiannis, marketing director for shot brand Plenish at Carlsberg Britvic. “The shift now is towards drinks that are both functional and transparent, with

simple, natural ingredients,” he says. “At Plenish, this is core to our DNA – from plant-powered m*lks with just three ingredients to shots that deliver 100% recommended intake of a daily vitamin.”

Functional drinks are booming, with a growth of 34% to £178m in the UK market^{xvii} as consumers seek drinks that go beyond simple refreshment, reveals Get More Vits co-founder & director Steve Norris. “Today’s modern consumers crave convenience and enjoyment, all while maintaining a healthy lifestyle. Category success is driven by the demand for drinks that help them to ‘get more’ – more immunity, more energy, more relaxation – while not compromising on taste or refreshment.

“Vitamin Drinks in the UK have seen growth of 30% in the last year^{xviii},” he adds. “This demonstrates a behaviour shift towards the more convenient lifestyle, stepping away from the conventional, mundane multivitamin supplement.”

Functional shots



are the real bright spot within the wider chilled juice category, delivering scale with retail sales value of £65m and +52% MAT volume growth^{xix}, says Jon Marchant, marketing director at Moju. Its research^{xx} has revealed that over 84% of shot sales are incremental to juice, with functional health and super-food ingredients being core drivers over refreshment. “With the current trends, functional

shots are set to grow to £98m by the end of 2026^{xxi}, overtaking both juice drinks and kids chilled juice during the next year,” he predicts, adding that functional shots are set to overtake coconut water in 2027, despite that segment’s strong performance of +28% RSV in the past year^{xxii}.

The last year has seen strong growth in premium soda and functional ferments, even as shoppers watch their

wallets, says Emma Thackray, co-founder of Hip Pop. “The total flavoured carbonates market remains robust at £1.18bn, up +7.4% YoY across UK grocery multiples^{xxiii},” she notes. “Within that, functional flavoured carbonates are the clear standout – now worth £76.3m and growing +47.4% in value^{xxiv}. Hip Pop is leading that charge – growing +138% year-on-year and now the fastest-growing brand in

the top 30 flavoured carbonates^{xxvi}.”

Kombucha sits within the functional drinks sector, which has added £51m RSV^{xxvi} to the soft drinks category this year, according to Andy Braithwaite, MD of Equinox Kombucha. “Kombucha is growing at around 24%^{xvii} thanks to a number of factors, including consumer interest in gut health, the search for good low/no alternatives and a desire to opt

for healthier soft drinks,” he says.

“That’s a stark comparison to 2% growth in the overall carbonates grocery market^{xviii} and suggests that these important lifestyle preferences drive consumers to prioritise products with health benefits even when the economic climate is uncertain. We expect the kombucha sector to continue to grow at around 14% CAGR well into the 2030s^{xxix}.”

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growth but helping to future-proof the chilled juice category by leveraging its inherent strengths – natural, wholesome, and fresh – to deliver immunity and vitality,” he says.

Steve Kearns, MD at Cawston Press, highlights the resilience of the soft drinks sector, with the overall category value growing across all segments. However, consumer caution over spending has impacted unit sales, particularly in juice and fruit water, reflecting a more selective approach to purchasing. The no & low drinks trend is having a positive impact on soft drinks, as consumers switch out of alcohol, he adds. “There has been a reported £400m switch into soft drinks in the last three years²³. Interestingly, consumers are increasingly focused on moderation, not abstinence, and this can be seen through the rise in ‘zebra striping’ – for example, swapping between alcoholic and non-alcoholic drinks when enjoying a night out.”

Resilient is also the word coined by Fentimans head of marketing & innovation Mark Platten to describe the soft drinks market over the past year. “In our 2026 Premium Soft Drink and Mixer Report²⁴, we found that inflation has continued to shape shopper behaviour, with prices per unit rising by around 6% and value sales growing modestly by 3%, but volumes have been largely flat,” he says.

Health continues to dominate trends

With health and wellbeing remaining top of mind for shoppers, more than 80% of GB consumers are limiting their sugar intake²⁵, says CCEP’s Yeomans. “That shift is showing up in soft drinks sales, where the low-calorie flavoured carbonates segment alone has grown by 23.1% in value over the last year²⁶,” he notes.

Many consumers are prioritising health and adopting a more proactive stance towards wellbeing, says Nichols’ Reay. “The demand for low- and no-sugar drinks remains strong, but we are increasingly seeing a behavioural shift, with functional attributes increasingly influencing purchase decisions and driving category innovation. Key areas of interest include gut health, immunity, relaxation, hydration, and products tailored to specific life stages. Products and categories with a pre-existing health association – such as fortified

beverages, juices and water – are well placed to benefit from this trend while categories like energy drinks are seeing a shift towards more natural propositions.

“Alongside functional health, taste, treat and experience also represent key growth drivers of soft drinks, especially among Gen Z,” she adds. “Demand is rising for bold new flavours as well as nostalgic options, as consumers seek unique and elevated experiences beyond the ordinary.”

NPD continues to drive sales in

“Alongside functional health, taste, treat and experience also represent key growth drivers of soft drinks, especially among Gen Z”

soft drinks as it brings an additional reason for consumers to shop the aisle, says Suntory’s Mistry. “The launch of Blucozade last year was a perfect example of this, and we’ve looked to replicate that success this year by going big on partnerships with our Lucozade athletes, Jude Bellingham and Anthony Joshua. The popularity and success of sports partnerships within soft drinks is a key driver of footfall in store, tapping into the fanfare for sport and recruiting new consumers into soft drinks.”

While health is influencing purchase decisions²⁷ in soft drinks, the concepts of health are changing, maintains Carlsberg Britvic’s Parker. “Health tracking is on the rise in the UK²⁸, and the food and drink people consume plays a key role in helping them achieve their wellness goals,” he says. “With this shift in mind, 97% of Carlsberg Britvic’s soft drinks portfolio in Great Britain is low or no calorie²⁹.”

Health and wellbeing trends are





absolutely dominating soft drinks at the moment, and we see this acutely in our sector, says Aqua Carpatica PR & trade comms director Alina Balatchi-Lupascu. “Consumers are moving firmly toward lower-sugar, ‘better for you’ beverages,” she says. “Aqua Carpatica’s philosophy from day one has been ‘pure, natural, and functional’. This is why our Flavours range starts with naturally alkaline mineral water, blends it with natural flavours, and it is lightly sweetened with agave syrup – avoiding refined sugar and artificial sweeteners entirely.”

Shoppers are cutting back on sugar, avoiding artificial aftertastes, and looking for clarity in what they drink, says Hip Pop co-founder and director Emma Thackray. “Functional soda is now one of the most exciting spaces in soft drinks, blending the fun of a fizzy drink with the benefits of wellness,” she says. “We’re the rocket setting soft drinks on fire – proving that ‘better-for-

you’ doesn’t have to be boring.”

Meanwhile, Cawston Press’ Kearns says today’s consumers are willing to pay more for high-quality drinks³⁰, which presents huge opportunities to drive value into the category with sophisticated premium soft drinks. The ‘not from concentrate’ category, which he anticipates will witness “remarkable growth in the coming years” illustrates a shift in demand away from carbonated drinks towards natural fruit juices³¹. Cawston Press’ research via YouGov³² has highlighted that 60% of UK adults are concerned about the amount of sugar and sweeteners in fizzy drink, and 63% would prefer their drinks to be made from more natural ingredients.

Get More Vits’ co-founder and director Steve Norris identifies strong momentum behind drinks with purpose. “Functional drinks are taking precedence where alcohol and coffee once dominated, reflecting a change in consumer lifestyle,” he says. “While refreshment and enjoyment remain central to the soft drinks category, there is an ever-increasing expectation for drinks to deliver added benefits, whether that be through added vitamins, adaptogens, electrolytes, protein or gut-friendly ingredients. The direction is clear: consumers are seeking smarter ways to hydrate.

“One standout trend is the surge in gut health-focused products, including kombuchas, prebiotic drinks, and fibre-fortified alternatives,” he adds. “Consumers are more informed about their health than ever before but even as shoppers seek out healthier options, they won’t sacrifice flavour, convenience or value. That balance between ‘better for you’ and ‘great tasting’ is at the heart of where much of the category innovation is happening.”

In the energy category, zero sugar continues to be the fastest-growing segment, outperforming original flavours at +13% vs +3% YoY³³, reveals AG Barr’s Labbate. “Zero-sugar flavours are growing even faster, at +16% YoY³⁴,” he says. “January is a fantastic time of year for zero-sugar energy, as sales were up by +10% in Jan 2024 vs 2023³⁵. We recognise a big opportunity for growth by supporting retailers and focusing on our zero-sugar range as the year kicks off.”

At packaging company DS Smith customer engagement manager Amy Cross points out that as drinks brands

diversify into lower-sugar, functional and wellness-led products, there’s pressure on packaging to both be adaptable and efficient. “Packaging must work harder to protect product integrity, maximise shelf impact and meet increasing regulatory scrutiny – all while staying cost-effective,” she says. “At DS Smith, we’re seeing rising demand for formats that work across product types while remaining fully recyclable and line-efficient. Our focus is on keeping packaging agile without compromising on quality, compliance or sustainability.”

According to Equinox Kombucha MD Andy Braithwaite, the kombucha market is consolidating around a few key players. “Our research suggests that consumers put taste and refreshment first, but that as they become more educated about the role of kombucha and fermented foods, they seek out authentic, premium products with a strong set of values and tangible provenance,” he says. “In a landscape where sweeteners and concentrates have been used routinely at the expense of taste and authenticity, we have chosen to focus on developing the best-tasting, traditionally fermented kombucha we can produce at scale. Our chilled product in glass bottles is raw while our ambient cans were developed to give retailers and shoppers an easy-to-store kombucha option that still delivers on flavour and gut-friendly credentials.”

In the water category, convenience and value remain central, but wider health-conscious trends have changed attitudes and buying behaviour, says Aqua Pura sales & marketing director Terri Cooper. “There’s a growing aversion to tap water and we’re seeing larger formats such as the 5L bottles become the fastest-growing in the market, reflecting how consumers look to use bottled water in the home across more occasions,” she says.

Cutting through the noise on-shelf

While the diversity of choice in soft drinks is exciting, there is a risk of consumers being overwhelmed, not only by sheer choice, but by jargon and lack of clarity, says Get More Vits’ Norris. “Customers want to understand, quickly and clearly, how a drink can support their health and wellbeing. Clear communication and visible cues at the point of sale have never been

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more important,” he notes. “Retailers are adapting to the trends, simplifying messaging through functional bays, benefit-based shelving and more intuitive shopping categories that help customers find products that meet their specific needs.”

Norris points, in particular to Tesco launching a functional drinks bay in just under 200 stores and developing this further in 2025, while Morrisons launched a ‘Healthier Options’ functional drinks bay in Q1 comprising brands across vitamin, CBD, and kombucha drinks, and based on early success, has recently doubled the number of stores in which this is found. “This demonstrates the category’s potential and the appetite from consumers for well-signposted, ‘better for you’ drinks, whose health benefits are easy to understand,” he says.

At Refresco, Mackay says authentic brands with adventurous flavours that stand out on-shelf are key in cutting through the noise and attracting shoppers, particularly as they move more of their social occasions into the home to manage spend.

The soft drinks category is increasingly busy, with new ‘superfoods’ and functional claims appearing constantly, says All Market Europe MD EMEA Tim Rees. “To stand out, we focus on clear usage occasions, whether it’s post-exercise hydration, post-fast hydration, during celebrations (or hydrating after celebrations) or for daily wellness – helping consumers quickly understand how and when to enjoy our products.” However, secondary purchase opportunities are key, he adds, particularly for versatile products like coconut water, which can fit multiple usage occasions and store locations, helping drive incremental sales and repeat purchases.

Shoppers are overwhelmed by options and empty claims, maintains Hip Pop’s Thackray. “Hip Pop stands out through simplicity: confident flavour names, colour-blocked design and a concise soda-led range that’s easy to shop.”

Bold design, clear functional messaging and a premium feel are also key for Nutrabort’s C4 Energy brand, says VP marketing EMEA Paul Coppin. “Retailers can boost the sector by expanding chiller space for functional energy, creating secondary placements near fitness or grab-and-go zones, and

On-trend flavours and ingredients within the soft drinks category

Innovation remains a key focus in the carbonates category, accounting for £20m worth of sales in the past year^a, says AG Barr’s Labbate. “Flavour extensions and limited editions are leading the way, attracting new shoppers by tapping into ‘time to treat myself’ shopper needs.”

Flavour innovation is booming, blending global discovery with nostalgic comfort, says Aqua Carpatica’s Balatchi-Lupascu. “Consumers are more adventurous now, and eager to try novel flavours they’ve seen trending online, yet they also appreciate familiar tastes with a twist. Looking ahead, we have two exciting NPD flavours on the way: Pink Grapefruit and Green Apple. Pink grapefruit taps into the growing appetite for tart, adult citrus profiles. Green apple, on the other hand, offers a crisp and juicy taste that evokes nostalgic orchard fruit but with a clean, modern edge.”

Flavour innovation continues to shape category growth, agrees CCEP’s Yeomans. “Cherry, for instance, has

emerged as a key contributor to cola growth, accounting for 6% of cola value gains in the past year^b.”

Demand for flavoured energy drinks also continues to grow, with innovation accounting for 28% of total category growth^c, he adds. “Standout launches this year include Monster Lando Norris Zero Sugar in Melon Yuzu, which hit shelves in June and Relentless Guava in April. “Both variants tap into consumer appetite for bold, tropical blends and adventurous taste profiles, particularly among Gen Z drinkers, who are actively seeking new flavour experiences and unique twists in the energy drinks space.”

In the premium soft drinks and mixer category, Fentimans’ head of marketing & innovation Mark Platten identifies more adventurous globally inspired flavours and complex taste profiles as a clear evolution. Driving this change are the rise of Eastern flavours such as yuzu, Sichuan pepper and Korean

pear, he says. Alongside this are elegant botanicals like orange blossom, rose and lavender. Meanwhile, coconut, dragon fruit and guava offer a sense of escapism and vibrancy, while ‘swavoury’ combinations such as honey, chilli and saffron bring a bold new twist to the category, he adds.

At Hip Pop, Thackray says seasonal flavours are crossing into soft drinks – but modernised for today’s drinkers. Hip Pop’s limited





Pumpkin Spice Soda launched in September ... flipped the sugary latte narrative on its head, proving that seasonal can be light, refreshing and real,” she says.

At All Market Europe, Vita Coco’s newest launch, a strawberries & cream flavoured sweet treat, delivers indulgence in a healthier way, says Rees. “It’s a clever, category-blending innovation: a coconut water-based, low-calorie drink that delivers on flavour

and nutritional credentials in equal measure,” he says. “Before Vita Coco Treats there was very little on the market that offered indulgence and natural low-sugar credentials in one.”

Taste is the

“Globally inspired flavours, such as yuzu, Sichuan pepper and Korean pear are a clear evolution”

No.1 reason for consumers buying into the functional/energy category, says Nutrabolt’s Coppin. C4 has a wide range of flavours and its latest collaboration, Millions, has launched to huge success, he says, with over 3 million consumers having already tried the nostalgic, sweet flavours: Bubblegum, Strawberry and Apple.

With taste and enjoyment still consistently at the forefront of soft drinks choices,

Carlsberg Britvic has unveiled the first new flavour since 2020 for 7UP – Pink Lemonade – which blends lemon, lime and raspberry. “Innovation has driven 35% of total value growth in the flavoured carbonates category over the past three years^d, highlighting the growing consumer appetite for new and exciting options,” says Parker. Meanwhile as soft drinks are seen as an affordable treat^e, indulgent options like drinkable desserts are in

demand^f, he adds. Earlier this year, the company launched two zero-sugar Pepsi cola flavours – Strawberries ‘n’ Cream and Cream Soda, to deliver “dessert-inspired experiences designed to attract younger Gen Z consumers”.

Fruit flavours remain a cornerstone of the soft drinks market, but with a twist, says Nichols’ Reay. “Consumers are increasingly drawn to new and less common options that add a sense of discovery,”

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merchandising by need state – think ‘morning boost’ or ‘focus&go’,” he adds.

Supermarket aisles can be overwhelming, affirms Carlsberg Britvic’s Petrogiannis. “At Plenish we stand out with clear pack design and simple messaging that communicates our plant-based, clean-label credentials,” he says. “To grow the category, we see opportunities in expanded chilled space, wellbeing zones, cross-merchandising, and clearer health signposting to ... empower consumers to make informed choices, and drive trial.”

While standing out on the shelf is more important than ever, it has to go hand-in-hand with sustainability and function, says DS Smith’s Cross. “Our packaging designs focus on maximising brand impact while reducing waste. We’re also seeing interest from retailers in smarter, secondary placements, and we work with brands to ensure their formats can support those opportunities. High-quality print is another lever that can be used to elevate packaging with finishes and texture, engaging multiple senses and set brands apart.”

Consumers feel great pressure to make good choices and to consider health factors in every shop: gut health, sugar and diabetes, reducing ultra-processed foods, 5-a-day, 30 plants a week – the list is endless and it’s no wonder that they feel overwhelmed, believes Equinox Kombucha’s Braithwaite. “Our research suggests that putting taste first helps cut through the competing priorities with a promise that everyone can buy into. Authentic kombucha is a strong choice for consumers looking for a low-sugar, gut-friendly, clean, soft drink, but to achieve real cut-through, it first has to convince that the flavour and refreshment deliver in the same way a more familiar choice would.”

However, Reay at Nichols believes carbonates shoppers typically possess a broad repertoire and demonstrate openness to inspiration, particularly through various in-store offers and brand blocking, which facilitates at-shelf navigation. “When purchasing soft drinks for immediate consumption, shoppers tend to adopt a more spontaneous and experimental approach, showing greater willingness to browse and explore new options,” she says. “Independent convenience



stores are perceived as playing an important and dynamic role in driving product discovery, supplemented by meal deals in larger retail outlets.”

While young adults remain key consumers of soft drinks, their habits are evolving, says CCEP’s Yeomans. “This group is more likely than any other to consume soft drinks alongside food, particularly during mealtime occasions³⁶,” he notes. “This behaviour shift presents a major opportunity for retailers to position soft drinks as essential mealtime companions.

“When purchasing drinks for immediate consumption, shoppers tend to adopt a more spontaneous approach, showing greater willingness to browse”

“Cross-merchandising soft drinks with sandwiches, snacks or hot food, or dual-siting them in food aisles and on meal deal fixtures, can capture these occasions and drive incremental sales, especially as cross-merchandising food and drink can increase shopper engagement by up to 32%³⁷.”

From those who have tried – but never bought – shots, 13% of consumers said it was because they had never seen them in-store³⁸, highlighting a real opportunity with retailers to drive greater visibility across in-store and online media, says Moju’s Marchant. “Feature space and promotion have been key in addressing barriers such as in-store visibility, helping to drive trial across functional shots,” he adds. “With 60% of juice shots consumed in the morning³⁹, Moju is collaborating with complementary functional brands like Biotiful to drive growth within the well-aligned breakfast occasion,” he says.



she says. “Kiwi, blueberry and clementine are gaining momentum, and we’re also seeing adventurous blends with ingredients like yuzu, chilli pepper or dandelion to deliver a more unexpected edge.”

Health and wellbeing are a strong influence too, which is fuelling interest in spicy and herbal profiles, she notes. “Ingredients such as ginger, turmeric, black pepper, chilli pepper and even jalapeño are coming through strongly, connecting both to functional health cues and global tastes.

“At the same time, indulgence is playing a big role,” adds Reay. “Dessert-inspired soft drinks – particularly in zero-sugar formats – are tapping into the appeal of sweet

treats without the guilt. Flavours such as strawberries & cream or rhubarb crumble & custard offer that comforting, indulgent moment.”

At Get More Vits, Norris says: “New, niche flavour profiles are always of interest to consumers, such as mint, cucumber or yuzu. And while these often appeal to the younger, intrigued generation, core mainstream flavours will always remain the most popular within the category. When it comes to flavour, familiarity is paramount, particularly if the goal is to switch consumers seamlessly from traditional sugary carbonated soft drinks to healthier options.”

For Moju, functional ingredients such as ginger and turmeric

continue to rise as the beacon flavours, together accounting for 81% of the functional shots category RSV[®]. “Google searches for ‘ginger shots’ have increased 10x times in the last five years, underlining their growing relevance,” says Marchant.

With wellness an important driver for people at all stages of life, functional ingredients such as mushrooms, ashwagandha, CBD and turmeric are exciting shoppers, says Equinox Kombucha’s Braithwaite. “Our recent Turmeric Lemon & Ginger special edition sold out so quickly in D2C that we have launched it as a permanent SKU in the Equinox bottled range. We are also revisiting our energy and relaxation drinks with

a view to relaunching them in 2026.”

Natural caffeine is on the rise, fuelled by demand for clean-label, plant-based energy, says Petrogiannis at Carlsberg Britvic. “The global natural caffeine market reached US\$3.4bn in 2023, and is expected to reach US\$5.27bn by 2031^b,” he reveals. “Driven by rising consumer demand for clean-label, organic and health-focused products, natural caffeine, derived from plant-based sources, has gained popularity due to its perceived health benefits.

“In response, Carlsberg Britvic launched Ginger Energy shots this summer, blending ginger, yerba mate and vitamins for a natural lift.”

Social media and the use of AI

Engaging in social media is absolutely vital, as it’s where consumers discover, connect with and ultimately build loyalty to brands, says Nichols’ Reay. “Social media is not just a marketing tool – it’s a community-building platform that allows us to share our brands’ values, respond in real time to consumers and create moments that resonate culturally, whether that’s through influencer partnerships, viral campaigns or user-generated content.

“Looking ahead, AI will play an increasingly influential role in shaping how we promote and sell our brands,” she adds. “From hyper-personalised recommendations and targeted advertising to trend prediction and product innovation, AI enables brands to understand their audiences more deeply and tailor their messaging with unprecedented precision. We’re also seeing AI emerge as a tool for ... supporting flavour development

through data analysis, and even powering interactive experiences that bring consumers closer to the brand.”

At Carlsberg Britvic, Parker says success in social media lies in embracing emerging channels and prioritising content that’s high-quality, engaging and genuinely authentic. “We’re already incorporating AI into our planning processes to increase efficiency and gain deeper insights, as well as for audience segmentation, predictive analysis, and personalised marketing to make our efforts even more targeted and effective,” he says.

Social media is core to C4’s strategy, reveals Nutrabort’s Coppin: “It’s where our audience trains, shares, and advocates. As a digital-first brand, we turn engagement into conversion through athlete partnerships, flavour collaborations, and user-generated content. AI enhances this by personalising messaging, predicting consumer needs, and optimising

creative in real time. From dynamic targeting to feedback loops, it drives relevance and retail velocity.”

Social media is central to how Vita Coco connects with consumers – especially as younger audiences now use TikTok and Instagram as discovery engines, often before Google, says All Market Europe’s Rees. For Vita Coco, this means creating content that’s both useful and entertaining: educating on hydration and recovery while inspiring around recipes, occasions and lifestyle moments.

Social media is essential for building brand visibility and loyalty, believes Aqua Carpatica’s Balatchi-Lupascu. “Our core consumers discover and engage with brands online, so we maintain a strong presence on Instagram, Facebook and TikTok, sharing everything from source photography to cocktail recipes and UGC content. We collaborate with wellness influencers and run

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interactive campaigns to build community and drive word of mouth. In a trend-led category, a single viral moment can transform sales, so staying active and authentic is key.

“Looking ahead, AI will supercharge this engagement,” she notes. “From personalised content and dynamic targeting to 24/7 chatbots answering consumer questions, AI offers powerful tools to deepen relationships. It can analyse trends, predict flavour demand, and optimise campaign timing. Together, social media and AI will shape how we connect, influence and grow in the next phase of the soft drinks market.”

Social media is instrumental for all brands, says Get More Vits’ Norris. “We have seen a shift towards fostering community and nurturing transformations, with social proof, such as testimonials, reviews and user-generated content (UGC), playing a pivotal role in purchasing decisions. Modern shoppers now seek validation and authenticity before committing to a purchase, relying on personal experience and endorsement. Platforms such as Instagram and TikTok have emerged as essential discovery tools. For Gen Z in particular, these social media channels serve as primary search engines over Google.”

This year Aqua Pura relaunched its social approach, including a new presence on TikTok in July. “It has been an exciting platform to ... underline our identity as a proudly northern mineral water,” says Cooper. “Aqua Pura is officially the fastest-growing mineral water brand of 2025⁴⁰, and our social-first strategy has been key in reshaping the category narrative – injecting fun and personality into what has traditionally been seen as a ‘dry’ under-invested space. Looking ahead, digital and AI will play a growing role in how we connect with shoppers at a more personal level and tailor promotions to better fit the needs of busy families.”

The key message to retailers

Nichols’ Reay believes that, to remain competitive in the soft drinks category in 2025 and beyond, retailers should align their product selections and strategies with both health-oriented and enjoyment-related trends – and lead with established brands that consumers know and trust.

In a competitive market, variety



isn’t just nice to have, it’s a strategic advantage, says Carlsberg Britvic’s Parker. The key to success lies in maintaining a varied soft drink offering that balances trusted core brands and products with exciting new flavours and formats. This will ensure retailers can fully capitalise on the booming category, ultimately helping them to maximise basket spend.

“The balance of category and commercial is crucial for the continued

success of energy drinks,” observes Nutrabolt’s Coppin. “There is a tail of energy SKUs underperforming and not offering consumers variation of choice,” he says. “To take advantage of emerging trends in functional ingredients, new unique flavours and natural benefits, more space needs to be dedicated to help expand the category and ultimately drive additional sales at the till.”

“Water continues to outpace every

Clean label and sustainability

“Clean label is now baseline – and the rise of GLP-1 weight-management medicines is accelerating that behaviour,” says Hip Pop’s Thackray. “In the UK, usage has nearly doubled from 2.3% to 4.1% of households (around 1.17m homes)^j. These consumers are reducing calorie-dense snacks and high-sugar drinks but still want flavour and purpose in every calorie,” she notes.

Cawston Press’ Kearns notes that transparency in food and beverage production is becoming a priority for consumers, with 76% checking ingredients labels before purchasing and 32% willing to pay more for products with transparent labelling^k.

Clean-label credentials and provenance have become key purchase drivers, says Aqua Carpatica’s Balatchi-Lupascu. “In fact, research shows that younger generations like Gen

Z and Millennials are actively seeking transparency: Gen Z loves a good brand story and adventure, while Millennials put heavy focus on sustainability and natural origins,” she says.

While sustainability is a growing trend in shopper behaviour, Vita Coco is proud to have put sustainability and provenance at the heart of everything they do, says Rees. “Back in 2014 the Vita Coco Project was founded, which has the ambition to positively impact 1 million people in coconut farming communities around the world. Each day, we crack and pack more than 3 million coconuts. Each coconut is handpicked from small family farms and cracked and packed within 72 hours of leaving the tree – making it as fresh as if you were in the tropics.”

“There are two years to go until the UK launches its first Deposit Return Scheme (DRS),” points

out Suntory’s Mistry. “We are committed to delivering a smooth and successful roll-out in the UK and now is the time to accelerate collaboration with suppliers to ensure we can hit the October 2027 deadline. Our research and insights report, ‘Deposit Return Schemes: What’s in Store for the UK?’, analyses the response to the introduction of the scheme in Ireland and we’re here to support customers throughout this transition, sharing insights and opportunities to help them prepare with confidence and implement reverse vending machines effectively.”

DS Smith’s Cross says soft drinks brands are working harder than ever to protect margins while meeting high consumer expectations around quality and sustainability. “As a business, we understand the unique challenges of protecting high-value products in a high-

cost environment and we’ve been helping brands to reach their sustainability goals and design out waste, all the while retaining quality packaging,” she says. “Brands are also using packaging to tell the clean-label story, which means that design quality, sustainability credentials and material choices of the packaging are all important factors to consider. “Our Circular Design Metrics – an industry-first framework – help brands quantify the impact of their choices and improve the circularity of their packaging.”

Consumers still look for sustainability proof points in the brand, so we ensure that all Aqua Pura bottles are made from 100% recycled plastic, excluding labels and caps which have been tethered to the bottle to avoid the lid getting lost in recycling, says Cooper. “Also, through ongoing improvements we’re using less plastic for our bottles.”

other soft drinks category, so it must have the share of space in store it deserves,” says Aqua Pura’s Cooper. “Retailers should look beyond core shelf space where footfall is reliant on dedicated trips to the bottled water category. However, off-shelf, secondary space and seasonal activations that can interrupt routine shops can unlock significant incremental sales.”

“Curate, don’t crowd,” advises Hip Pop’s Thackray. “Functional is the

future of flavoured carbonates, but clarity wins. Back a few credible brands with proven velocity and genuine function – and let the results speak for themselves. Hip Pop proves that when soda gets real, shoppers follow.”

Retailers have the chance to transform chilled juice into the home of naturally functional drinks by accelerating the awareness and penetration of shots, says Moju’s Marchant. Success lies in building

a credible, naturally functional proposition, anchored in beacon brands, trusted ingredients and tangible health benefits, creating a category that inspires shoppers and future-proofs growth.

In terms of packaging, fibre-based innovation is your biggest opportunity, says DS Smith. “Consumers are demanding sustainable, premium and practical formats. The brands, retailers and suppliers that succeed are going

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to be the ones who design out waste, increase recyclability, and elevate the packaging experience. Also, don't underestimate the savings that well-designed packaging can unlock in your supply chain."

Health and wellbeing is a major macro trend that will only continue to grow, believes Carlsberg Britvic's Petrogiannis. "Retailers should make it easier for consumers to navigate this space by highlighting propositions like Plenish shots – clear, simple, and highly relevant products that drive trial and repeat purchase," he says.

Equinox Kombucha's Braithwaite notes that there is so much value for retailers in functional drinks where "average price per litre exceeds £5, versus £1.57⁴¹ for the rest of the soft drinks category. The gut-health trend is gathering momentum and it's key to the growth of functional drinks," he adds. "Help brands to educate and enthuse consumers by supporting these innovative, consumer-focused young businesses and their success will pay you back in spades."

While premium soft drinks already carry a sense of aspiration and excitement, there's an opportunity to take that even further, observes Fentimans' Platten. "By showcasing quality, enhancing visibility and offering smart value, retailers can help consumers trade up with confidence and unlock even more category growth."

"Today's consumers are looking for great value, but they're not willing to compromise on quality," he adds. "Retailers who support this balance through clear messaging, thoughtful



promotions and dedicated space for premium soft drinks can unlock real growth."

"The functional drinks category is awash with new brands and product launches, some of which truly resonate with, and delight, shoppers," says Get More Vits' Norris. "However, there is a risk that shoppers will be bamboozled when facing such a dizzying array of health products at the fixture – which could be detrimental to penetration and sales. Thus, retailers and brands alike should seek more than ever to view the fixture through the eyes of the consumer and challenge themselves to guide and educate in the most appealing way possible. Beauty, after all, is in the eye of the beholder."

Aqua Carpatica's message to retailers is this: embrace the 'better-

for-you' revolution in soft drinks, says Balatchi-Lupascu. "Consumers in 2025 and beyond are increasingly seeking out drinks that deliver on health, experience and quality. Retailers who devote space and support the kinds of products that bring genuine innovation and added value to the category will be rewarded with engaged shoppers and higher-value sales."

"Curate your soft drinks range with an eye on quality over quantity: a thoughtfully selected line-up of healthier, on-trend drinks will cut through the clutter and excite customers far more than a wall of 'me-too' sugary pop," she adds.

Finally, Suntory's Mistry brings in a word of caution. "As we approach the Autumn Budget and the final decision on the government's proposed changes to the Soft Drinks Industry Levy, our industry faces a huge amount of uncertainty," he says. "This policy change would create enormous disruption to soft drinks businesses that are doing more than any other to reduce sugar intake, for no credible health gain. The cost and complexity for our sector is massive – at a time when we're also investing to deliver world-class packaging reform in a DRS."

"A competitive soft drinks sector is essential to continue boosting economic growth and driving positive change through innovation across the UK," he adds. "We're committed to navigating a way through this uncertainty as best as possible and work in close collaboration with our customers to push for growth in this brilliant category."

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Fentimans

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Refreshing and fruity taste experience

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KEY BRANDS

Fentimans English
Apple 250ml
Fentimans Orange
Blossom 250ml
Fentimans Rhubarb
Lemonade 275ml

↙ This year Fentimans has expanded its range with exciting and innovative flavours and formats, reveals Mark Platten, head of marketing & innovation. "Our latest launches include crisp English Apple, and zesty Orange Blossom in convenient 250ml cans, plus the vibrant Rhubarb Lemonade in our iconic bottle – each offering a distinctive, refreshing taste experience," he says. "These additions reflect our commitment to flavour innovation, quality, sustainability, and HFSS-compliant recipes, demonstrating our ongoing drive to deliver unique, botanically brewed drinks that delight consumers and stand out on-shelf."

Fentimans is supporting this NPD through in-store activity and awareness-building initiatives. With the latest cans range now available in Sainsbury's, consumers will be able to sample the products over the weekend of 31 October. This will be complemented by PR and social media support to help



“Our latest NPD reflects our ongoing drive to deliver unique drinks that delight consumers”

raise awareness and introduce the new products to a wider audience.

"Made using the finest natural ingredients, our soft drinks deliver an unrivalled depth of flavour," says Platten. "They combine tradition, taste and versatility, giving retailers a compelling reason to stock a brand that consistently attracts consumers and drives repeat purchases."

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KEY BRANDS

Boost; Irrn-Bru; Rubicon
Spring; Rubicon
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As the nation's festive to-do list grows, so does the need for a quick energy boost, says Dino Labbate, chief commercial officer at AG Barr.

"Last year, demand for energy drinks led to £610m in category sales in the three months to Christmas, up by +£20m vs 2023¹," he reveals.

"Boost, the No.2 Sports brand and No.3 Stimulants brand², is well placed to support retailers this winter. With 50% of its sales incremental – the highest in the category – the brand sold +2 million more units last Christmas vs three years ago³"

Boost will help retailers drive sales this Christmas with a heavyweight media campaign, reaching two in five energy drinkers at least two times each.

"As the festive season gives way to increased moderation in January, retailers that shift their energy focus to zero sugar will be best-placed to drive sales," says Labbate.

"Last January, zero-sugar energy



“Boost sold +2m more units last Christmas vs three years ago, so is well placed to help retailers”

sales increased by +10% in volume⁴. Boost intends to capitalise on this surging demand by combining innovation with heavyweight consumer campaigns.

"By ensuring their shelves are stocked with Boost, retailers can provide shoppers with the festive energy they are looking for and the zero-sugar boost they'll crave in the new year."

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KEY BRANDS

Boost
Irr-Bru
Rubicon Spring
Rubicon Spring Vits
Rubicon Raw
Barr Flavour

At AG Barr, we look at the water category as three segments – plain, flavoured and functional, explains Dino Labbate, chief commercial officer at AG Barr. “Plain water, while worth £1.7bn a year¹, makes up the bulk of sales but is comparatively low-value and low-margin compared to flavoured and functional,” he says. “Retailers should continue to offer shoppers plain water in all the range of formats they expect to see, but they should also make room for the more lucrative and growing areas of flavoured and functional.

“By stocking trusted brands and flavours in these segments, retailers can help shoppers meet their lifestyle goals, while removing the taste and excitement barriers that can limit plain water sales, he adds. “Rubicon Spring is the No.1 sparkling flavoured water brand². Its Black Cherry/Raspberry flavour is the No.1 500ml SKU, while Orange/Mango flavour is the No.2³. We advise retailers to merchandise the range near to plain water to offer a convenient trade up option.

“Rubicon Spring Vits, meanwhile, is already the No.1 functional water brand in symbols and independents after its launch earlier this year, and is almost double the size of the No. 2 brand⁴. Its range of Black Cherry/Pomegranate, Mango/Passion and Strawberry/Watermelon offers three unique flavour profiles that appeal to a broad range of consumers. Each one has an ‘immunity



“Few launches in recent years have driven the flavoured and functional water segments quite like Rubicon Spring and Rubicon Spring Vits. We have truly delivered what consumers are looking for in terms of health benefits, calories and taste”

+ energy’ flash, clearly signalling to shoppers that it offers the added functional benefits they are looking for.

“Few launches in recent years have driven the flavoured and functional water segments quite like Rubicon Spring and Rubicon Spring Vits, notes Labbate. “The ranges have been a huge success because we have truly delivered what consumers are looking for in terms of health benefits, calories and taste.”

Rubicon Spring will be building momentum through the winter months, continuing its strategy of targeted social ads to keep it top of mind. In February and March, the brand will launch a nationwide burst of outdoor advertising, reaching more than 15m consumers, driving retailer sales.

“The water category holds an enormous revenue and profit opportunity for retailers who meet the needs of their shoppers by stocking brands within all three segments – plain, flavoured and functional,” says Labbate. “Through AG Barr’s continuous pipeline of flavour innovation via trusted and much-loved brands that truly deliver, the business will continue to help retailers maximise their sales and profits throughout winter 2025 and into 2026.”



Source

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#1 VITAMIN WATER IN SYMBOLS & INDEPENDENTS WITH A 22% CATEGORY SHARE**

* Circana, Value sales, Flavoured Water, MAT to 21/12/24, Total UK ** Functional Water Unit & Value Sales by SKU, S&I, 12 w.e 28th June 2025, Circana

Empowering functional hydration

DETAILS

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KEY CONTACTS

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Managing Director

KEY BRANDS

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

➡ The future of the juice category is undeniably coconuts – and Vita Coco, the brand that pioneered packaged coconut water, is leading the charge, says Tim Rees, MD for Vita Coco. “Even 16 years after its UK debut, Vita Coco continues to defy expectations, posting a remarkable 32.3%¹ growth YOY. With a 92%² share of the chilled coconut water category, Vita Coco is single-handedly driving the fastest-growing major category in beverages,” he says. “Coconut water stands out for its multi-functional appeal: from post-exercise hydration to post-fast refreshment, a smoothie, coffee, matcha or cocktail mixer, or even a morning-after pick-me-up. This versatility has allowed the brand to reach new audiences, connect with a wide range of consumers across diverse, but clear, usage occasions, and deliver £58m RSV in 2025³.”

Vita Coco’s 500ml Original, found in meal deals across the UK, has overtaken orange juice to become the No.1 juice and smoothie choice for customers when purchasing a meal deal⁴, reveals Rees. In addition, Vita Coco has launched an organic line, strawberry & cream-flavoured treats and a range of multipacks. “Multipacks represent a huge opportunity as consumption habits evolve,” he notes. “The shift towards working from home, use of coconut water as a sports drink



“Even 16 years after its UK debut, Vita Coco continues to defy expectations, posting a remarkable 32.3% growth year on year¹”

and rising awareness of coconut water’s health benefits make it easier for shoppers to have chilled coconut water ready whenever they need it. Vita Coco Organic is made with 100% organic coconuts sourced directly from small family farms, and the pack is used to communicate the sustainable sourcing practices, reinforcing transparency and authenticity for consumers.”

Marketing activity

Over the past year, Vita Coco has also drilled down on its occasion-led marketing, encouraging consumers to ‘Supercharge their Smoothies’ with coconut water as the base. The campaign, executed across national retail and above-the-line in January, saw the brand work with Em The Nutritionist to develop a smoothie that has a variety of health benefits.

During Ramadan, Vita Coco was the hydration partner for the Ramadan Tent Project, sampling over 50,000 consumers breaking their fast at iconic locations across the UK. And, over summer, a 360-degree campaign, with Britain’s fastest man, Zharnel Hughes, as its face, encouraged consumers to ‘Refresh Like An Athlete’.

“This is an incredibly exciting time for Vita Coco as we begin to define what the future of the functional category looks like,” says Rees. “Consumers are continuing to feel the health benefits of coconut water and understanding how it fits into their lifestyle and we are perfectly poised for continued growth.”

**Source**

¹⁻⁴ Circana, Coconut Water, 52 w/e 06.09.25



THE FUTURE OF THE JUICE CATEGORY IS LOOKING COCONUTS

VITA COCO #1 DRIVER OF GROWTH IN CHILLED JUICE



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Where purity meets flavour

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KEY BRANDS

AQUA Carpatica Natural Mineral Water
AQUA Carpatica Sparkling Flavours

 In a soft drinks market awash with sugary concoctions and artificial ingredients, Aqua Carpatica is charting a different course. The brand, famed for its exceptionally pure natural mineral water, has expanded into the world of flavoured drinks with Aqua Carpatica Flavours, a range of sparkling beverages that marries the brand's pristine Carpathian natural mineral water with natural fruit extracts and a touch of agave syrup. The ethos is simple: deliver the full flavour experience consumers crave, but do it in a natural, health-conscious way.

The range debuted with four distinctive variants: Lime & Mint, Raspberry, Strawberry & Elderflower, and Peach & Mango. Each offers a modern twist on familiar flavours. "We wanted to create flavours that are exciting yet familiar," says Alina Balatchi-Lupascu, PR & trade communications director. "Our Strawberry & Elderflower pairs the sweetness of British summer strawberries with elegant elderflower – a trending botanical in premium soft drinks. It's a nod to tradition, with a contemporary edge." Every recipe is designed so the natural fruit essence takes centre stage, gently elevated by light carbonation.

Crucially, Aqua Carpatica avoids refined sugar and artificial sweeteners entirely. Instead, a small amount of agave syrup provides balanced sweetness without chemicals or aftertaste. This low-GI alternative ensures fewer calories while allowing the natural mineral water character to shine. "For today's health-conscious shopper, this matters: it's a soft drink that feels good to drink and serve," notes Balatchi-Lupascu.

The range has broad appeal – health-minded adults looking for a guilt-free treat, parents seeking clean alternatives for their families, and cocktail enthusiasts using it as a premium mixer. Naturally rich in electrolytes and low in sugar, Aqua Carpatica Flavours aligns perfectly with the UK's drive to cut sugar consumption, while still delivering indulgent taste.

To support the launch, the company



“Every recipe in our AQUA Carpatica Flavours range is designed so the natural fruit essence takes centre stage, gently elevated by light carbonation. Crucially, it avoids refined sugar and artificial sweetness”

has invested in integrated marketing. High-profile sampling activations have introduced the drinks to consumers, while on social media, creative campaigns – such as flavour polls and mixology reels – have built engagement.

Innovation continues in 2025 with two new NPDs: Pink Grapefruit, offering a tart, sophisticated citrus profile; and Green Apple, delivering crisp, nostalgic freshness. Both flavours respond to consumer demand for vibrant, natural tastes with a grown-up edge.

For retailers, Aqua Carpatica Flavours brings real category value, tapping into the major growth drivers – health, clean label, provenance and premium taste – while benefiting from the brand's strong reputation in bottled water. "Aqua Carpatica Flavours embodies the modern soft drink ideal: refreshment and flavour, with none of the compromise," says Balatchi-Lupascu. "For retailers looking to future-proof their soft drinks range, this must-stock brand proves that when you put purity and taste first, consumers follow."

PURITY

with a twist



PURE HYDRATION.IMPULSE READY.

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Aqua Purae: hello@roxane.uk
w: <https://roxane.uk>

Bringing northern wit to water

DETAILS

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TikTok: [aquapurauk](https://www.tiktok.com/@aquapurauk)

You can follow the campaign and latest news from Aqua Pura across our socials including TikTok and Instagram

KEY CONTACTS



Terri Cooper
Sales & Marketing Director

KEY BRANDS

Aqua Pura

 Bottled water has long been accused of being a dry under-invested category, says Terri Cooper, sales & marketing director at Aqua Pura. “At Aqua Pura, we’ve made it our mission to change that perception,” she says. “As the UK’s fastest-growing natural mineral water brand¹, we’re proving that serious growth and serious fun can go hand in hand.”

This autumn Aqua Pura has launched a category-first AI-driven campaign designed to bring levity and northern wit into a space that has historically played it too straight, reveals Cooper. “The activation is rooted in a simple insight: parents, especially during half term, are craving a little reassurance and positivity. Our response has been to deliver that reassurance in a uniquely Aqua Pura way – with humour, humanity and Denny the duck.

“During the campaign we’re appearing with charming one-liners across half term-focused content where parents might be looking for advice, support and community, and equally across physical spaces in the north west to give parents and northerners a smile and a lift,” she adds.

AI is playing an increasingly important role in the company’s marketing efforts. “During this campaign, we’re using AI platforms to better identify and place our content within relevant parent-focused environments,” notes Cooper. “The result is sharper, more targeted engagement with families who are juggling hectic schedules, rising costs and the pressures of keeping kids entertained during school breaks.”

To amplify the campaign, Aqua Pura has partnered with Mumsnet, the UK’s leading parenting platform. The activity includes native editorial content, integrated placements across the Mumsnet site, meeting parents on trusted ground, while looking for advice from the community.

The campaign extends into high-impact OOH activations across the north west, including Liverpool and Manchester, reinforcing the brand’s identity as a proudly northern mineral water, with provenance at its



“Aqua Pura has always been a brand built on purity and trust. What’s changed is how we express that. The launch of Denny the duck earlier this year, coupled with our AI-enabled campaign, signals a step-change; we’re showing that mineral water can be as entertaining as it is essential”

core. “Our water is sourced from the north of England, and this regional pride is now front and centre in our communications,” adds Cooper. “By showing up in the places our shoppers live, work and socialise, we’re strengthening both brand awareness and local loyalty.

Fun, provenance and credibility

For FMCG buyers, the message is clear: Aqua Pura is bringing something different to bottled water, she says. “We’re combining category-leading growth of +135% vs last year² with a creative platform that makes the fixture more engaging for shoppers. We’re delivering on all the fundamentals – provenance, sustainability and value – while layering in humour and energy that give the brand cultural relevance.

“Aqua Pura has always been a brand built on purity and trust. What’s changed is how we express that. The launch of our mascot Denny the duck earlier this year, coupled with this AI-enabled campaign, signals a step-change; we’re showing that mineral water can be as entertaining as it is essential.

“By pairing the reassurance parents want with the humour they need, we’re giving retailers a brand that truly stands out on-shelf,” concludes Cooper.

Source

¹ Nielsen, Total UK Market, Total Coverage & Grocery, Water Category, Still & Sparkling, Litres, Growth (%), Data to 06.09.25

² Nielsen, Total UK Market, Total Coverage, Still & Sparkling, Aqua Pura, Litres, Volume Growth (%), Data to 06.09.25

**GIVE IT SOME
NORTHERN BOTTLE**

**QUACK
ON**

WITH



**WONDERFULLY
NORTHERN
MINERAL WATER**

Flavour, fizz and festive flair

DETAILS

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Britvic Mixers,
Juices & Cordials
Fruit Shoot
Gatorade
J2O
Jimmy's Iced Coffee
Lipton Ice Tea
The London Essence
Company
Mountain Dew
Pepsi MAX
Plenish
Purdey's
Robinsons
Rockstar
R. White's
Tango
Teisseire

➔ The soft drinks category has evolved significantly and Carlsberg Britvic remains at the forefront, delivering flavour-packed innovation, category-first formats, and marketing campaigns that engage shoppers, says Ben Parker, VP sales – off trade at the company. “We’ve adapted our portfolio to meet emerging needs and trends,” he notes. “The soft drinks category in grocery has grown 7.3% in the last year to reach £740m¹ and the appetite is only increasing. So, we’ve focused heavily on NPД across trusted brands and exciting new launches.”

Meeting growing demand for sophisticated and alcohol-free alternatives, J2O Fizz has launched in time for the festive season in Apple & Watermelon and Pear & Raspberry, reveals Parker. “Packaged in 750ml glass bottles, J2O taps into the growing demand for elevated, non-alcoholic options,” he says. “Alongside the launch of J2O Fizz, we’ve brought back the much-loved seasonal favourite, J2O Glitterberry, supported by an on-pack promotion. As consumers entertain more often at home during the run-up to Christmas, we recognise how important this period is for retailers.”

Supporting products with targeted advertising and marketing campaigns is also essential to keeping them front of mind, he adds. “We’re not just launching products, we’re building experiences and tapping into cultural moments. This October, Robinsons, the UK’s No.1 squash brand², is partnering with Universal Studios once again for the release of the ‘Wicked: For Good’ movie. Inspired by the film’s characters, Elphaba and Glinda, the campaign encourages shoppers to answer, ‘Witch



“The soft drinks category in grocery has grown 7.3% in the last year to reach £740m¹, and the appetite is only increasing. So, we’ve focused heavily on NPД across trusted brands and exciting new launches”

Flavour Are You?’, driving interaction at purchase and promoting trial across the limited-edition range. The tie-up includes a new ‘Wonderfully Fruity Twist’ flavour and extends into Fruit Shoot, with ‘Thrillifying Citrus’ (Citrus Twist) and ‘Sparkle Berry’ (Strawberry & Pineapple) flavours.”

Beyond the Christmas run-up, the company’s core favourites perform strongly all year round, observes Parker. “To keep interest high and drive growth, we’ve invested in limited-edition and flavour-led innovation across our carbonates portfolio,” he says. “Fruit-flavoured carbonates, now worth £1.2bn³, have seen huge momentum. We’ve helped to drive growth and recruit new shoppers with sweet-treat inspired flavours such as Pepsi Strawberries ‘N’ Cream and Pepsi Cream Soda, created for Gen Z.

“We’re also evolving our marketing to ensure our innovation lands powerfully with consumers. From TV and digital campaigns to social-first strategies, we’re creating deeper connections. Pepsi’s rebrand delivered a consistent visual identity across Pepsi Max, Diet, and Regular, while Tango’s mischievous and humorous tone, in its ‘Outrageously Orange’ campaign has resonated with young adults and driven footfall and purchase in-store.”

Source

¹ NielsenIQ RMS, Total Grocery Multis, Total Soft Drinks, Carlsberg Britvic Defined, Value Sales, MAT 52 w/e 20.09.25

² Nielsen IQ Retail Measurement Service, Value Sales, Total Flavoured Concentrates, Carlsberg Britvic defined, 52 w/e 23.08.25

³ NielsenIQ RMS, Total Coverage, Fruit Flavoured Carbonates, Carlsberg Britvic Defined, Total Coverage, Value Sales, L52 w/e 20.09.25





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0% ABV



*18+, UK. PURCHASE, INTERNET & EMAIL REQUIRED; KEEP RECEIPT. ENTER AT WWW.J2O.CO.UK/JUICYPRIZES 01/09/25-31/12/25. MAX 1 PRIZE/PERSON, 1 ENTRY/RECEIPT. 288 X TICKETMASTER EGIFT CARDS & 160 X BLUETOOTH SPEAKERS AVAILABLE TO BE WON VIA WINNING MOMENTS. FIRST ENTRANT WHO ENTERS ON OR AFTER A RANDOMLY ALLOCATED WINNING MOMENT WILL WIN THE PRIZE ALLOCATED TO THAT WINNING MOMENT. UNCLAIMED PRIZES REALLOCATED TO MOP UP DRAW. SEE WEBSITE FOR FULL TERMS & EXCLUSIONS. PROMOTER: BRITVIC SOFT DRINKS LTD.

**NIELSEN IQ RMS, SHARE OF SALES VALUE, GB TOTAL COVERAGE, ADULT SOFT DRINKS CARLSBERG BRITVIC DEFINED, 52 W/E 13/09/25.

Shots with benefits for all

DETAILS

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Alex Petrogiannis
Marketing Director
Thomas Edwards
Commercial Director

KEY BRANDS

Plenish
– Core range of plant-based m*lk*ls: Oat, Almond, Soya, Coconut
– Barista range of plant-based m*lk*ls: Barista Oat, Barista Almond, Barista Soya
– Enriched Oat M*lk (fortified)
– Core shots range available in 420ml multi-serve dosing bottles, and 60ml single shots. Variants include Ginger Immunity; Turmeric Recovery; Fiery Mango Defence; Berry Gut Health; and Ginger Energy
– Ultra Ginger Shots available in 420ml multi-serve dosing bottles

Plenish, the UK's No.1 shot brand¹ and The Grocer's 2025 Soft Drinks Brand of Year, is redefining functional drinks. A pioneer in wellness since 2012, Plenish creates products that make it easy, enjoyable and effective for consumers to bring health into their routines. "For more than a decade, the brand has been trusted by wellness experts and loved by consumers for its commitment to clean-label products that taste great while delivering real benefits," explains Russell Goldman, MD of Breakthrough Brands at Carlsberg Britvic.

With innovation at the heart of the brand's mission, Plenish's shots range sits at the forefront of that ambition. "We see enormous untapped potential in the shots category, and we're driving penetration by bringing in new audiences, unlocking new consumption occasions, and launching first-to-market propositions that consumers can truly trust," says Goldman.

Innovation that drives the category

This year, Plenish has contributed to RSV growth more than any brand² thanks to a relentless focus on innovation, notes marketing director Alex Petrogiannis. "The brand's most recent shot, Ultra Ginger, is a bold and superior proposition that delivers powerful flavour, using the best-in-class liquids in the market," he says. "Ultra Ginger is the UK's first and only shot to use triple sourced ginger³: cold-pressed and dehydrated ginger with ginger extract, for maximum potency."



“We’re driving penetration by bringing in new audiences, unlocking new consumption occasions, and launching first-to-market propositions”

Earlier this year, Plenish also introduced Ginger Energy, a blend of fiery ginger with yerba mate for a balanced lift powered by natural caffeine, which has quickly become the brand's third best-selling product⁴. It also reached new audiences with the launch of Kids Shots, the UK's first vitamin shot for children, providing a convenient and great-tasting way to introduce families to daily wellness.

Marketing that drives trust

To support the growing portfolio, Plenish has invested heavily in a multi-million pound campaign, 'Give it a Shot', to ensure consumers know about its products and understand how these can fit into their lifestyles. "This set out to make wellness feel approachable and exciting, and resonated with new and existing audiences," says Petrogiannis.

Believing that in-person experiences are critical for building real connection, Plenish has also invested in real-life activations – from a padel event to running clubs and mass sampling – with the aim of making wellness feel relevant, fun and engaging.

Petrogiannis adds: "Beyond this, we partner with credible experts and voices in wellness, including the appointment of registered nutritionist, Emily English as our 'chief nutrition officer', and working with GP and broadcaster Dr Zoe Williams, ensuring our message is authoritative and authentic."



Source

^{1,3} Nielsen, Total Coverage, Britvic Defined Juice Shots, Value & Unit Sales, L52 w/e 06.09.25

⁴ Internal company data

SHOTS THAT BRING THE BUZZ TO YOUR CHILLER

Plenish shots are
the #1 RSV growth
driver in the juice
shot category*



Plenish

*Nielsen, Total Coverage, Juice Shot Category (as defined by Carlsberg Britvic), Value Sales, MAT w.e 06.09.25

*Vitamin C contributes to the normal function of the immune system. Consume as part of a healthy balanced diet and active lifestyle.

G

**The Grocer
Gold Awards
2025**

WINNER

**Soft Drinks Brand
of the Year**

Pressing for a better result

DETAILS

Cawston Press
Insta: @cawstonpress

KEY CONTACTS

Steve Kearns
Managing Director

KEY BRANDS

Cawston Press
– Sparkling Cans
330ml & 250ml
– Fruit Waters 200ml
– Juices 1L

 Cawston Press was born from a love of apples, and in 2026, the brand will be 40 years old, reveals company MD Steve Kearns. “Our mission is ‘pressing for better’ and this desire to do the right thing has always been core to the way we make drinks, as well as the way we want to do business,” he says. “In 2024, we achieved B Corp certification and in 2025, we published our first Impact Report which is a brilliant way to highlight the different ways the mission of ‘pressing for better’ lives across our business.

Cawston Press may have started with just apple juice but today the brand is positioned to be the drink of choice across multiple different consumption moments, says Kearns. “We take pressed juice and never use sweeteners, concentrates or anything else, and we call this our ‘No Jiggery Pokery’ promise. This is because we believe that using only high-quality ingredients gives you the best-tasting and most delicious drinks.”

From sparkling to juice

The company’s range of adult sparkling drinks, made from just pressed juice and sparkling water, is sold in 330ml and 250ml cans. These come in Rhubarb, Cloudy Apple, Elderflower Lemonade, Ginger Beer, Lemonade and Orange variants. The same approach to making refreshing drinks is also used in its range for children, called Fruit Waters, which takes pressed fruit juice and adds still water in a 200ml carton. Flavours include Cloudy Apple, Sunshine Orange, Apple & Mango, Apple & Pear and Apple & Summer Berries.

“We are also proud to sell pressed



“We take pressed juice and never use sweeteners, concentrates or anything else, and we call this our ‘No Jiggery Pokery’ promise”

fruit juice and pressed vegetable juice – again, all made the Cawston way with nothing unnecessary added,” says Kearns. “Brilliant Beetroot, Terrific Tomato, Apple & Ginger, Apple & Elderflower, Apple & Rhubarb, Cloudy Apple, Zesty Orange, Pink Grapefruit, Sweet Pineapple and Crisp Cranberry make up the range available in 1L cartons. This year, our Brilliant Beetroot won a Great Taste Award, with a shout-out soon appearing on-pack.”

As seen on TV

2025 also saw the company’s first TV campaign, which ran across the summer in conjunction with Channel 4. “We created a new 10-second TV spot which visually brought to life our belief that ‘Life is best pressed with Cawston Press,’” says Kearns. “It featured beautiful photography of both the fruit that goes into our delicious drinks and our sparkling cans held between the two sides of a press made from fruit.”

— NO.1 —
not from concentrate
KIDS DRINKS & JUICE BRAND*



*NIQ RMS MNDH Ambient Juice Drinks & Fruit Juice L52 W/E 06/09/25 for the Total UK Grocery Multis Market.

A portfolio built to perform

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Fanta
Dr Pepper
Sprite
Schweppes
Oasis
GLACÉAU Smartwater
Appletiser
Costa Coffee RTD
Powerade

Soft drinks are an everyday favourite, and with 98% of GB households buying into the category¹ and value sales up 3.8% year on year², their popularity continues to grow. Coca-Cola Europacific Partners (CCEP) is meeting that demand with a portfolio built to perform, says Rob Yeomans, VP commercial development.

Innovation that sells

“The Coca-Cola range continues to have strong on-shelf presence and leads category sales,” he says. “Coca-Cola Original Taste is still GB’s No.1 soft drink³, while Coca-Cola Zero Sugar has grown to £477m⁴ in value and Diet Coke remains a £495m⁵ brand with outstanding customer loyalty⁶. “But growth isn’t just coming from the company’s regular variants. New flavours are driving excitement and incremental sales. For example, Coca-Cola Lime, launched earlier this year in both Original and Zero Sugar, has already generated £1.84m in sales⁷.”

Fanta, the No.1 flavoured carbonate brand⁸, added three zero-sugar variants – Apple, Raspberry and limited-edition Tutti Frutti – designed to meet soaring demand for no-sugar refreshment⁹, and Dr Pepper Cherry Crush Zero Sugar, a Valentine’s tie-in, flew off shelves, delivering 38% of total brand growth and almost 8m litres sold¹⁰.

Making moments work harder

CCEP continues to create campaigns that build awareness and drive real results in-store, adds Yeomans. Coca-Cola marked its 125th anniversary in GB with the Local Bosses portrait series, celebrating corner shop retailers, and reignited its iconic ‘Share a Coke’ campaign with a new digital twist, including the innovative Memory Maker experience.



“Growth isn’t just coming from CCEP’s regular variants. New flavours are driving incremental sales and excitement”

At Halloween, CCEP partnered with Universal Pictures and Blumhouse to create limited-edition Fanta packs, featuring horror icons, including a brand-new zero-sugar launch – Chucky’s own Forest Berries Zero Sugar.

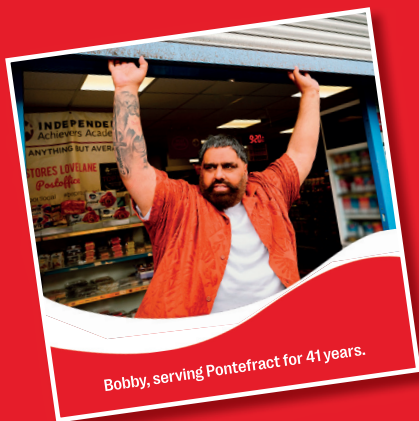
Schweppes brought summer vibes early with its Tropical Soda launch, infusing the mixers category with hibiscus and guava. And, as Coca-Cola and Schweppes’ Christmas campaigns return this year, retailers can expect another powerful push to maximise seasonal footfall and spend.

Growth retailers can count on

Consumers continue to seek choice in soft drinks, with low-calorie flavoured carbonates up 23.1% in value last year¹¹. “CCEP is meeting this demand with no- and low-sugar NPD across its portfolio,” says Yeomans. “Iconic brands, fast-moving innovation, culturally driven campaigns and category leadership make CCEP a key partner for growth.”

Source

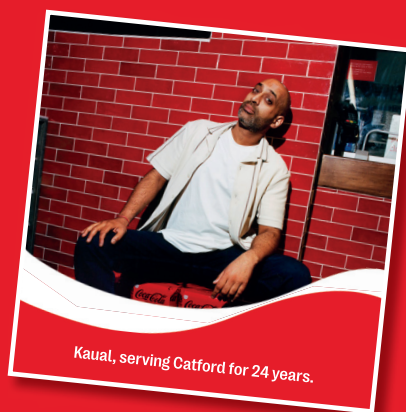
- ¹ Kantar, Take-home NARTD, MAT to 23.03.25
- ² Nielsen, Total Coverage, Value % growth, NARTD: 52 w/e 22.03.25
- ³ Nielsen, Total GB, Val Sales, MAT to 17.05.25
- ⁴ Nielsen Total Coverage incl. discounters value data MAT to 22.03.25
- ⁵ Kantar Worldpanel, 01.10.23
- ⁶ Nielsen Total Coverage incl. discounters value data MAT to 22.03.25
- ⁷ UK Attitudes towards Sugar and Sweeteners Consumer Report 2024
- ⁸ Nielsen Data, MAT to P8 09.08.25
- ⁹ NIQ Scantrack, Flavours, Total Coverage incl. discounters, Latest 52 w/e 07.09.24 - 23.1%



Bobby, serving Pontefract for 41 years.



Bay, serving Middlesbrough for 27 years.



Kaual, serving Catford for 24 years.

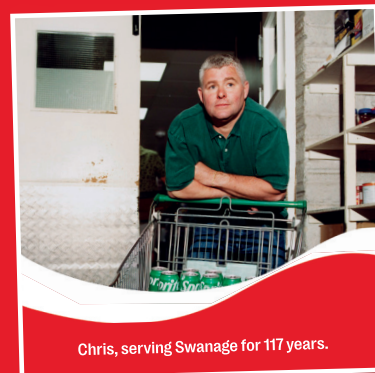
Coca-Cola presents
The Bosses



Sophie, serving Edinburgh for 42 years.



Sunita, serving Wigston for 41 years.



Chris, serving Swanage for 117 years.

No longer niche, now mainstream

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KEY BRANDS

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Relentless
Reign Storm Clean Energy

Volume sales of energy drinks continue to rise¹, with the category expected to reach £3.8bn² in value by 2030³. As a major driving force of this growth, Monster has supercharged sales over the last year, remaining the fastest-growing major energy brand and fastest-growing of the top 20 FMCG brands in GB in value terms⁴, reveals Rob Yeomans, VP commercial development at CCEP. “Monster is making waves within energy and soft drinks, breaking into the UK’s top 10 FMCG brands, now worth more than £801m⁵, against a backdrop of 11.7%⁶ volume growth,” he says.

Core strength and bold innovation

The core Monster range is led by the iconic Original variant, worth £139m in retail⁷, accompanied by Monster Original zero sugar – now worth £33m⁸ in sales just two years from launch.

“Epic marketing campaigns aligned with fan interests such as gaming and high-octane sports continue to support the growth of the brand, alongside the big, bold innovations it’s famous for – covering different flavours, juice blends and functional benefits, with and without sugar,” reveals Yeomans.

Monster’s innovation pipeline delivered 48%⁹ of energy drink innovation sales in the past year. In 2025, the brand has expanded choice across its key growth platforms, with zero sugar Monster Ultra Fantasy Ruby Red, Monster Juiced Rio Punch, and Monster Lando Norris Zero Sugar.

The Monster Ultra range remains the No.1 zero sugar energy brand in GB¹⁰.

Meeting varied needs and occasions

Energy drinks are gaining appeal among more consumers and across more occasions throughout the day¹¹, driven by innovation and diversification within the category.



“**Monster is making waves in energy and soft drinks, breaking into the UK’s top 10 FMCG brands, now worth more than £801m⁵, against a backdrop of 11.7% volume growth⁶**”



Women now account for nearly half (49%) of energy drink consumers¹², up from 40% back in 2022, while on-the-go remains the top occasion for energy drinks¹³, with 67% of energy drinkers preferring to buy their drinks chilled. Interestingly, 57% of out-of-home occasions in the energy category align with lunch, showing their appeal as a go-to midday mealtime boost¹⁴.

Home-based energy drink occasions also continues rise in popularity – as shown by ongoing volume and value growth for Monster’s multipacks¹⁵.

A powerful portfolio

The Monster Energy Co provides even more choice to energy fans through its wider portfolio. Relentless, the No.4 energy drink brand in GB¹⁶, expanded its offering this year with the launch of Relentless Guava, as well as making its full line-up available in a £1 PMP.

Meanwhile, Reign Storm Clean Energy, part of the emerging wellness energy segment, is already worth £2.4m just over a year from launch¹⁷. The range features three tropical flavours with natural colours, zero sugar, plus vitamins and plant-based caffeine.

“2025 has been yet another epic year for Monster Energy Co. and its distributor CCEP, with even bigger and better innovations and high-octane marketing activity to come in 2026,” concludes Yeomans. “So, watch out!”

Source

¹ Nielsen, L52w/e 06.09.25

² Nielsen, Total Market, FY Value Sales 2024, Actual & Future Predictor based on historic 6-year CAGR

³ Monster Energy Internal CAGR prediction to 2030

⁴ Nielsen, L52w/e 06.09.25

⁵ Energy Audience U&A, May 2022, weighted base: 6,531 Consumers, GB, BE, DE, SP, SW, FR, NO

⁶ Energy Audience U&A 2025, GB base = 1035

⁷ Shopper behaviour intervention test 2023

¹⁴⁻¹⁷ Nielsen, L52 w/e 06.09.25

GROWTH TASTES GOOD WITH MONSTER FLAVOURS.

FLAVOURED ENERGY DRINKS

add excitement and choice.

They are huge! Worth

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Unlocking drinks' potential

DETAILS

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Liz Manuvelpillai
Packaging Sales, Marketing
& Innovation Director

KEY BRANDS

Packaging Solutions
Recycling Services
Paper Products
POS Display Solutions
High Quality Print

For too long, packaging has been underestimated, often seen as a way to transport product, rather than a strategic tool for growth, says Amy Cross, customer engagement manager for DS Smith UK & Ireland.

"But that view is changing," she says. "In a category as dynamic as drinks – where innovation is booming, consumer expectations are rising, and supply chains are under pressure – brands are recognising that packaging has the potential to do far more."

"At DS Smith, we believe packaging is one of the most under-used levers available to brand and marketing teams. It reaches every customer, shapes brand perception and, when designed intelligently, can unlock major efficiencies across your entire supply chain."

"That's why our approach considers everything from the production line to the POS display on the high street. We help drinks brands design packaging that delivers at every step of their supply chain; reducing waste, cutting emissions, improving pallet efficiency, and lowering total supply chain costs."

Differentiating your product

Innovation and sustainability don't need to be trade-offs – they can be accelerators of one another, explains Smith. "Our fibre-based packaging solutions are proof. Whether it's DS Smith Lift Up – our fully recyclable alternative to stretch film for rigid bottles, which can reduce CO2 emissions by up to 42%¹ – or DS Smith Round Wrap, which not only allows you to differentiate and look premium on shelf, but it also reduces CO2 emissions by up to 24%², our designs perform where it matters most."

"Our recent collaboration with Carlsberg Britvic, upgrading their OTOR4 packaging to a new OTOR8 'bag-in-box' design, shows this in action³," she reveals. "The new design enables an average of 25% more boxes to be loaded onto each pallet⁴ – cutting over 50 tonnes of carbon from transport emissions annually, while also improving product stability and storage efficiency⁵. This is the first step in our



Packaging is one of the most under-used levers available to brand and marketing teams. It reaches every customer, shapes brand perception and, when designed intelligently, can unlock efficiencies across your supply chain"

partnership with Carlsberg Britvic, and we're also working on new POS displays to showcase their range of J2O drinks."

Circular Design Metrics

But DS Smith doesn't stop at the product, adds Cross. "With our Circular Design Metrics – the first tool of its kind – we give customers a clear, data-led view of how circular their packaging is, across eight sustainability indicators, helping them make informed decisions."

"The drinks category is only getting more complex: regulation is tightening; input costs are rising; and consumers are demanding better – in fact, 65% believe that business and brands are responsible for driving sustainability⁶," she says. "Packaging is no longer the afterthought – it's the differentiator."

"It's time to rethink the role of packaging. With the right partner, it can reduce cost, drive sustainability, and support innovation. At DS Smith, that is what we do best."

Source

¹ Figures derived from DS Smith Lifecycle Assessment; third-party panel reviewed. Available on request.

² CO2 reduction percentage can differ depending on the comparable existing wrap. Morning information on DS Smith Round Wrap can be found here: <https://www.dssmith.com/uk/products-services/packaging-solutions/retail-packaging/consumer-packaging/ds-smith-round-wrap>

³ OTOR4 and OTOR8 refers to 'bag in a box' packaging used to transport and store syrups which are then fitted to drinks stations.

⁴ Calculated based on the weight of the OTOR4 7-litre packaging and the OTOR8 12-litre packaging. The original OTOR4 packaging had a 18.7% reduction, and the 12 litre has a 10.5% reduction

⁵ Based on calculations using DS Smith's Circular Design Metrics. An industry first, it rates and compares the circularity of packaging designs across 8 different indicators: Design for reuse, supply chain optimisation, recyclability, planet safety, material utilisation, renewable source, recycled content and carbon footprint. Based on average mileage between Carlsberg Britvic sites and full pallet loads.

⁶ Toluna & DS Smith, 2024

DS Smith Lift Up

- Improved sustainability
- Stand out in store
- Tested and validated
- Superior customer Experience

Up to
42%
reduction
in CO₂ emissions with
DS Smith Lift Up*



Discover DS Smith
Lift Up

* Figures derived from DS Smith Lifecycle Assessment, third party panel reviewed. Available on request.

Equinox Kombucha

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Shaking it up with organic kombucha

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– Contact James to discuss how Equinox Kombucha could add some fizz to your functional soft drinks offer

KEY BRANDS

Equinox Kombucha
– Award-winning natural fruit flavours
– 100% natural ingredients
– Low calorie with no artificial sweeteners
– Fizzing with probiotic goodness and antioxidants
– B Corp and organic
– BRCGS AA rated: the highest standard of quality assurance
– Vegan, halal, gluten-free

Equinox is the UK's leading producer of craft kombucha at scale¹, with a range of chilled kombucha tea in glass bottles and an ambient range in cans.

Every drink the business produces is carefully brewed using the original symbiotic culture of bacteria and yeast (SCOBY), which its backpacking founders brought back from Asia more than a decade ago. Equinox uses an authentic brewing and blending process to create kombucha that puts flavour first, says MD Andy Braithwaite. "Our approach is refreshingly simple," he explains. "We've always prioritised the taste of our drinks. Our kombucha is organic and 100% natural because we believe that's how you make the best-tasting product."

"As consumers become more familiar with the idea of kombucha as a health-conscious drink choice the market is consolidating around a few key players. We believe authentic, fermented products like ours will be what better-informed kombucha drinkers chose over the mass-produced, artificially sweetened products that don't deliver on flavour or gut-friendly credentials."

New flavours and function

In the past 12 months Equinox has added new flavours and formats to its



“Our approach is refreshingly simple. We’ve always prioritised the taste of our drinks. Our kombucha is organic and 100% natural because we believe that’s how you make the best-tasting product”

range of kombucha in 250ml cans. A classic Cola & Lime and a traditional lemonade-style Sicilian Lemon were added to the range to deliver a familiar taste profile for shoppers looking for a gut-friendly swap for their regular fizzy drink. There is also a 4-can pack option in single flavours or a mixed box of Raspberry & Elderflower, Blood Orange, Fiery Ginger and Pineapple & Mango.

In the 275ml bottled range, Equinox has pushed further into the functional sector with a Turmeric, Lemon & Ginger variant that was introduced as a limited edition and quickly found a place in the permanent line-up. "This focus on functional benefits will continue in 2026, with plans to launch naturally powered, lean-labelled energy and relaxation drinks that don't compromise on flavour," reveals Braithwaite.

The success of the best-selling Ginger and Raspberry & Elderflower flavours in shareable 750ml bottles led to the addition of Sicilian Lemon earlier this year. Consumer feedback suggests that all three flavours have been popular with shoppers looking to replace wine with a meal and as a convenient choice for those who now drink kombucha every day as part of their healthy lifestyle routine².

Keen to cement its position as one of the founders of the kombucha market in the UK, Equinox will be investing in education and awareness under its new 'Find Your Fizz' campaign which seeks to communicate the feel-good factor kombucha promotes.



Source

- ¹ Circana, powered by Northstar
² Combined feedback from individual retailer sales and questionnaires/informal interviews

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POP CULTURE**



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PUT THE FIZZ IN YOUR FIXTURE**

Get More Vits

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Healthy hydration for all

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Zoe Harrold
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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’ – rather than merely ‘take’ – their vitamins to stay healthy, says co-founder & director Steve Norris. “This underpins the company’s belief that there should be a delicious, healthy drink for everyone, regardless of life stage or lifestyle,” he says. “The tasty combinations of familiar fruit flavours – such as lemon & lime, apple & raspberry, mango & passion fruit – appeal to consumers, whether they be new to Get More Vits or long-standing loyalists of their range of drinks. The brand is becoming more widely available in a growing range of both 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, a Fibre drink to aid gut health and, new for this year, a Magnesium drink to tackle tiredness, improve cognitive function and aid muscle recovery. “This has ensured we have been well-placed to help retailers curate functional drinks sections, as well as help customers make healthier choices, while not compromising on taste,” notes Norris.

Get More Vits’ hero Vitamin D Mango & Passionfruit drink is available in 500ml and 1L PET, as well as a 330ml sleek can. “Such has been the continued surge of this product across all its formats, that our two new Vit D flavours – Sparkling Pineapple & Grapefruit and Still Raspberry & Pomegranate – continue to flourish,”



“The company’s belief is that there should be a healthy drink for everyone, regardless of life stage or lifestyle”

reveals Norris. “These replicate the same winning formula of the original, offering the NHS-recommended daily dose of 10 micrograms per serving.”

With taste central to every piece of NPD, the team have built on last year’s launch of Get More Vits Multivitamin Squash, by introducing a kids’ version, for those aged three upwards. Made with 20% real fruit juice and containing a 25% daily dose of no fewer than eight essential vitamins in every glass, the goal is to broaden the appeal of staying healthy, at all ages. “This range extension aims to help parents keep little ones healthy and hydrated when many foods and drinks targeted at this age segment are still laden with sugar, salt and saturated fat,” explains Norris.

“As our range of products develops, so has our marketing activity, with a growing army of social media influencers supported by an enhanced advertising presence online. In the last year, we have also ventured outdoors with a targeted digital campaign across major cities, and launched on TikTok.”

As soft drink consumers increasingly seek out healthier and tastier options, 2025 will be the biggest in Get More Vits’ 12-year history. And with a new website showcasing its full range of products – driving consumer awareness, education and sales – and a range of exciting NPD planned for 2026, the company is ready to deliver more record sales, next year and beyond.



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could taste
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5 calories. 0g sugar. 10mcg vitamin D.*

TESCO Sainsbury's ASDA  Morrisons WHSmith eocado
getmorevits.com

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

Putting the fun in functional

DETAILS

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Co-founder
Kenny Goodman
Co-founder

KEY PRODUCTS

Hip Pop
– **Soda:** Pumpkin Spice; Pink Grapefruit; Berries & Cherries; Tropical Peach; Ginger & Turmeric
– **Kombucha:** Ginger & Yuzu; Apple & Elderflower; Blueberry & Ginger; Strawberry & Pineapple
– **CBD Kombucha:** Passionfruit & Guava; Cherry & Blackberry

Why stock Hip Pop?

* **Taste that converts:** recipes that win blind on flavour.
* **No-nonsense labels:** clear, fast, honest.
* **Shelf impact:** colour-blocked design that lifts baskets.
* **Reliable activation:** trade plans that drive rate of sale.
* **Momentum:** culturally relevant NPD, growing brand love and proven growth.

↓ Hip Pop makes soda, kombucha and CBD kombucha that deliver on both flavour and function, says co-founder Emma Thackray. “We’re proving soft drinks can be good for you and taste unreal. Hip Pop is now listed in Sainsbury’s, M&S, Waitrose and Morrisons, supported by a fast-growing online community and innovation that connects culture with category growth,” she says. “Shoppers want proper fizz without the syrupy hit or fake aftertaste, and that’s exactly where Hip Pop wins. We keep labels simple, flavours bold and products that drive real value for retailers.”

Why now?

Functional is reshaping soft drinks, notes Thackray. “Within flavoured carbonates, the functional segment grew +47.4% in value year-on-year¹. At +138% growth², Hip Pop was the fastest-growing brand in the top 30³,” she says. “Consumers are trading up for soda that delivers real value – taste, function and credibility in one can.”

A changing household

Accelerating this shift is the rise of GLP-1 medicines, she adds. Around 1.17m UK households now include a user⁴, cutting grocery spend on sugary drinks by over 5%⁵. “With £279m in government backing to expand access, this is a long-term behaviour change – and Hip Pop’s gut-friendly, prebiotic soda fits perfectly into this new landscape.”

New product to shout about

The limited Pumpkin Spice Soda proves that seasonal can be smart, adds Thackray. “It’s bright, warming and free



“Shoppers want proper fizz without the syrupy hit or fake aftertaste and that’s exactly where Hip Pop wins. We keep labels simple, flavours bold and products that drive real value for retailers”

from syrup or sweeteners – a lighter, modern twist on an autumn icon. A typical pumpkin spice latte can contain up to 50g of sugar; Hip Pop’s version delivers the same depth with less than 7.5g per can. The first online drop sold out fast, showing how culturally relevant NPD can capture attention and bring new shoppers into the category.”

What makes Hip Pop move?

“Soda is our focus – it’s where flavour, health and fun meet,” explains Thackray. “Every can combines real fruit, prebiotic fibre and no sweeteners for a clean, full-bodied taste. Research shows prebiotics support beneficial gut microbes and digestive health, giving Hip Pop a functional edge.

“Design plays a huge role too: clear flavour names, colour-blocked packaging and fridge appeal that’s unmistakably Hip Pop.”

Marketing that adds value

Hip Pop keeps the hype real, she says. “Our ‘Get Real’ platform runs through everything – from retailer partnerships and in-store sampling to playful social and PR bursts. Our activity drives trial and awareness – from limited drops to on-tap installations in offices and cafés.

“We’re here to prove the better choice can be the tastiest one,” adds Thackray. “Retailers who give functional soda a bit more chiller space will be backing the next big growth driver in soft drinks.”



Source

¹ NielsenIQ, Value Sales, 52 w/e 09.09.25

² Internal company figures

³ See 1

⁴ <https://alumni.cornell.edu/snack-bar/cornell-study-finds-gpl-1-patients-reduce-spending-on-food/>

PROPER GOOD POP

FASTEST GROWING
SOFT DRINKS BRAND*



+138% YOY
GROWTH

X REAL FLAVOUR • GUT FRIENDLY • NO SWEETENERS X

*NielsenIQ, Sept 2025

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MOJU

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Shots that Bring the Boom

DETAILS

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Jon Marchant
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 Vitality Shot
– 60ml shot and 420ml dosing bottle
MOJU Hot Mango Immunity Shot
– 60ml shot and 420ml dosing bottle
MOJU Spicy Piña Immunity Shot
– 420ml dosing bottle
MOJU Honey Lemon Immunity Shot
– 420ml dosing bottle

RRP: £5.95 420ml
RRP: £2.25 60ml

Moju is the UK's leading functional shots brand¹, helping consumers kickstart their day and build healthier habits. In its mission to help people live life with more mojo, the brand sources the highest-quality, most potent and nutritious ingredients, including Peruvian ginger and turmeric – its signature 'super roots' – to deliver a one-of-a-kind, fiery flavour. "Every Moju shot has – and always will be – pressed in small batches, to deliver a fresh, potent, all-natural boom," says marketing director Jon Marchant.

As the functional shots pioneer, Moju continues to disrupt the codes of mainstream juice with a single-minded proposition built around vitality and immunity – meeting consumer demand for naturally functional options to power busy and active lifestyles, it says.

Over the last 52 weeks, Moju has driven £8.9m of growth for chilled juice², while delivering leading volume growth in the functional shot category – an additional 689,000 litres³ enjoyed by UK consumers over the past year, equivalent to 11.5m more shots.

"More and more consumers include Moju in their daily rituals as a caffeine-free way to kickstart their day," notes Marchant. "This is reflected in Moju's category-leading loyalty: a 44% repeat rate for its Ginger Dosing Bottle, compared with 23% across chilled juice⁴, and a volume per buyer twice the category average at 3.4 litres a year⁵."

Moju makes the top three branded value ROS SKUs in functional shots⁶ – Moju Ginger 420ml, Ginger 60ml and Extra Strength Ginger 420ml, with Moju Ginger 420ml now the fifth-highest branded value ROS in total chilled juice⁷.



“In its mission to help people live life with more mojo, the brand sources the highest-quality, most potent and nutritious ingredients, including Peruvian ginger and turmeric to deliver a one-of-a-kind fiery flavour”

To power on-the-go breakfasts, Moju recently launched its 3 x 60ml Ginger multipack as a convenient, ready-to-go solution, supporting consumers' planned health rituals when leaving the house, and driving incremental value, repeat purchase and basket spend.

Over the past three years, Moju has invested £8m in above-the-line campaigns to build brand awareness and bring functional shots to the mainstream. This autumn sees Moju's biggest-ever ATL campaign, 'Bring on the Boom', reaching over 49 million people nationwide. Signalling a strategic evolution in the brand's long-term development, the campaign champions the unique physical and emotional power of Moju's fresh 'Super Root' shots, with high-impact activity across OOH, digital, social, influencer and retail media, supported with 400,000 samples to supercharge trial.

Moju has also expanded its Immunity blends range to attract curious shoppers into functional shots, with its latest NPD, 'Honey Lemon', just landing in the market. Rooted in the traditional remedy, Honey Lemon targets those consumers intrigued by the signature kick of Moju Ginger shots but hesitant about the heat. Hitting 2 out of 5 on the Moju spice-o-meter scale, Honey Lemon's smoother introduction to fresh-pressed Peruvian ginger balances zesty lemon and soothing honey – delivering flavour and functionality.

Source

- ¹ 48% market share: Circana Total Market, Volume Sales, 52 w/e 31.08.25
² Circana sourced, 52 w/e 31.08.25
³ Retailer X, Customer % Repeat Rate, MOJU Ginger Dosing Bottle & Take-Home Chilled Juice, 52 w/e 23.08.25
⁴ Circana Total Market Weighted Rate of Sale 31.08.25



MOJU®



THE UK'S
#1
FUNCTIONAL
SHOTS BRAND

Sources: 1. Circana Total Market UK
& NI, Volume & Value Sales, 52we
31.08.25; 2. Kantar Total Market,
Volume & Penetration 52we 15.06.25

Powering up performance energy

DETAILS

C4 Energy

Insta: c4energy_eur

TikTok: c4energy_eur

FB: C4 Energy Europe

KEY CONTACTS

Paul Coppin

VP Marketing EMEA,

Nutrabolt

KEY BRANDS

C4 Performance Energy

C4 Original Pre-workout

C4 Sport Pre-workout

C4 Original Pre-workout shot

C4 Whey Protein

Over the past year, C4 has continued to use its strategic partnerships to develop new and differentiated flavour profiles that excite consumers and drive category growth. A standout example is the recent expansion of the successful Millions partnership with the launch of the new Millions Apple flavour – a strong, nostalgic flavour within the non-alcoholic ready-to-drink (NARD) category but with a modern twist.

NPD remains a key driver in the category, accounting for 64% of total growth¹ in 2024. In fact, shoppers are three times more likely to buy into energy compared to other soft drinks sectors, due to innovation². “This highlights how, at C4, we will continue to drive innovation into 2026 with new and exciting flavour collaborations,” says Paul Coppin, VP marketing EMEA at Nutrabolt. “These innovations not only strengthen our shelf presence but also reinforce C4’s position as a category leader in performance energy.”

C4 Performance Energy’s marketing mix is designed to drive both mental and physical availability – the twin engines of brand growth. “We invest in bold, distinctive assets: high-impact packaging, distinct flavour innovation, and science-backed benefits that make C4 a key brand for today’s Gen Z consumer,” notes Coppin. “Digitally,



“We will continue to drive innovation into 2026 with new and exciting flavour collaborations”

we scale reach and relevance through a dynamic mix of athlete-led content, authentic social storytelling, and community-driven campaigns.

“In-store, we use occasion-based merchandising, sampling and consistent brand cues, targeting a broad audience across multiple touchpoints that align with consumer need states.”

C4 Performance Energy is a retail essential that combines a function-first appeal with bold flavour innovation and trusted performance by both elite and everyday athletes to help fuel their day, he adds. “With 160mg caffeine, BetaPower, and zero sugar C4 delivers real energy – not just a buzz. C4’s versatility across occasions – whether as a morning boost, a pre-workout or mid-day focus – fits multiple consumer need states and expands basket size.”

“C4’s standout flavour innovation, from exciting collaborations like Millions to trending tropical profiles, sets the brand apart and drives repeat purchase. C4’s innovation is matched by strong digital momentum across social platforms which activates a loyal, fitness-focused community to convert social engagement into purchase.

“On-shelf, C4’s bold packaging, clear functional claims and impactful merchandising help make the brand pop, capturing attention and driving conversion. C4 consistently outpaces category growth in key channels, delivering velocity and premium margin to retailers³.”



Source

¹ Nielsen Value Sales, MAT, Total Coverage to WE 29.12.24

² Shopper U&A Study, GB 1000 respondents, 2024

³ Circana, Value Growth (C4 +42%), All Outlets, MAT vs YA to 06.09.25

C4

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NOW**



**THE FASTEST GROWING ENERGY
DRINK BRAND IN THE UK***

*Source: Circana Symbols & Independents 25th Jan 2025, Sports & Energy Value Sales – sales over £25,000 in both time periods



Disney link set to attract kids

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KEY BRANDS

Radnor Hills

Radnor Hills, one of the UK's leading soft drinks manufacturers, has unveiled a new collaboration with Disney.

To celebrate the live-action reimagining of their 2002 animated classic Disney Lilo & Stitch, Radnor Fruits has launched three character-inspired flavoured drinks. The specially branded 200ml Tetra Paks feature a design of the Disney Stitch character from the film and in flavours which include Apple, Forest Fruits and Orange.

Radnor Fruits is a school-approved* range of ambient juice drinks which contain 50% Radnor Hills spring water, 50% real fruit juice and no added sugar. The Radnor Fruits Disney Stitch range is packaged in lunchbox-ready Tetra Pak cartons, made with a pull tab technology which means children can drink straight from the pack. The drinks align with government guidelines of school foods standards and are CQUIN- and HFSS-compliant as well as being allergen-free.

Chris Butler, marketing manager of Radnor Hills, which this year celebrates its 35th anniversary, said: "We've been keeping children happily hydrated for over 30 years, so it's very exciting to announce our first collaboration with Disney. The Disney Lilo & Stitch film celebrates the importance of family and community, making this collaboration extra special as our Radnor Fruits brand is loved by children and parents, and is all about creating moments of joy.

"The new trio of our best-selling fruit flavours have been a success from the start, with retailers and foodservice loving the combination of Radnor Fruits, a trusted family brand, with the fun of a Disney Stitch design. Branded and licensing products like this are fuelling the growth of the category, and



“Branded and licensing products like this are fuelling the growth of the category, and parents are looking for products they can trust and that their kids will enjoy”

parents are looking for products they can trust and that their kids will enjoy.

"Our Radnor Fruits Disney Lilo & Stitch range is designed for convenience and is ideal for lunchboxes, travel or daily hydration with our 200ml cartons perfect for little hands."

The new products are now available online in-store across the UK at Morrisons and will be supported with advertising, sampling, Disney digital POS and a TikTok live event with giveaways.

Purity and passion

Independent and family-owned, Radnor Hills has been producing its soft drinks all made with the exceptionally pure spring water sourced from boreholes on its farm in the heart of Powys in mid-Wales for over three decades.

Producing over 400m units of drinks annually, Radnor Hills is passionate about sustainability and prioritises sourcing ingredients and packaging locally to reduce its carbon footprint.

"Conveying an eco-friendly message to consumers is crucial, especially in the increasingly crowded and competitive FMCG space," says Butler. "We're committed to sustainability and have invested in our own on-site 2MW solar farm, which produces 25% of our annual electricity consumption and directly reduces our Scope 2 emissions. We're also on track to becoming a net zero business by 2045."

The company has been a proud zero-waste-to-landfill site since 2018, and recycles everything it possibly can.



*In England, Wales and Northern Ireland

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drink just got
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Radnor
fruits

Disney
Stitch

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*School compliant in England, Wales and Northern Ireland

A new era for ginger beer

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KEY BRANDS

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Ting
Emerge
SUSO
MacB
Sunpride
Ben Shaws
Welch's
Mr Freeze
Jubbly
Del Monte
Sunny D
Cherry Good
Um Bongo
Libby's

➔ In 2025, Refresco has started to market Old Jamaica Ginger Beer to a new younger audience through the NPD launch of Lime & Ginger and a full packaging rebrand of its Regular, Light and Extra Fiery variants, reveals senior commercial brand manager Gary Keller. "This received fantastic feedback through consumer pack testing pre-launch, sharing that the new branding was adventurous and dynamic," he says.

"Building on the success of flavoured carbonated soft drinks (CSD) cans, with a consumer shift towards bold, authentic flavours, our journey has embarked on introducing Lime & Ginger through the rebrand, creating a modern twist on a classic, delivering a zesty, refreshing, full-flavoured soda to appeal to new consumers bringing them into the ginger beer category."

Full social media campaigns across Instagram and TikTok – #keepitginger – ensured New Old Jamaica delivered spicy content, bold positioning and broader appeal to target both Gen Z and Millennials with a flavour-first, fun drink where refreshing lime meets fiery ginger, he adds.

"Our new and impactful brand identity, delivering great shelf presence and standout appeal, as well as the bold flavours across our range, will ensure more cans in more hands through 2026," he says.

Say hello to the new flow

In 2025, Ting became the brand for tropically inspired, flavoured CSD



“Refresco has started to market Old Jamaica Ginger Beer to a new, younger audience through the NPD launch of Lime & Ginger and a full packaging rebrand. In 2025, Ting saw the launch of five new flavours to support the original Grapefruit Ting”

with the launch of five new flavours into the Ting range to support the original Grapefruit Ting, reveals Keller. “Meanwhile, we also launched possibly one of the tastiest sodas this summer in Pink Ting – a pink grapefruit-flavoured soda.

“Pink Ting appeals both in terms of aesthetics and taste, delivering a standout proposition backed up with fresh, zingy flavours to awaken consumers’ tastebuds,” he notes. “The feedback has been awesome so far and Pink Ting truly provides a point of difference and shelf presence for the Ting range.”

“Again, full social media campaigns across Instagram and TikTok – under #instantislandvibes – will take consumers away from their day to a feeling of instant island vibes from their first sip,” he notes. “Let’s mix Tings up’ across the full Ting range will target Gen Z and Millennials and introduce them to the full zing, full Ting flavours.”

“Ting’s mixability with spirits enables consumers to impress their friends and have fun deciding which is their favourite drinking solo. Let every Ting go as Ting is calling.”



Refresco

Celebrating 25 years
of our drinks on
every table



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DETAILS

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KEY CONTACTS

Alpesh Mistry
Sales Director GB

KEY BRANDS

Lucozade Energy
Lucozade Sport
Lucozade Alert
Orangina
Ribena



This year, Suntory Beverage & Food GB&I (SBF GB&I) has created standout marketing initiatives and above-the-line campaigns to make its iconic brands, Lucozade and Ribena, front and centre in-store.

“We’ve continued to invest in our soft drinks to deliver big campaign moments that resonate with our consumers and help drive category growth, giving retailers new and exciting reasons to stock our brands,” says Alpesh Mistry, sales director at SBF GB&I.

Lucozade Sport scores

SBF GB&I expanded the Lucozade Sport portfolio with a zesty new launch, Lucozade Sport Ice Kick, a collaboration with England football star Jude Bellingham. Lucozade Sport is the UK’s No.1 sports drink¹ and Lucozade Sport Ice Kick is now worth over £14m². Sports drinks in particular are seeing strong performance with +11.4% volume growth year to date³, led by strong double-digit growth from Lucozade Sport, at +30.8%⁴. “Lucozade Sport Ice Kick landed just in time to take advantage of a big summer of football, making it a must-stock for retailers in the lead-up to, and during, the Lionesses’ winning campaign,” notes Mistry. Supported with a social-first approach, the launch included videos on Lucozade and Jude Bellingham’s social channels, to capture shopper attention.

Lucozade Alert is a knockout

SBF GB&I also collaborated with Anthony Joshua for a special edition of Lucozade Alert Mango Peachade Zero Sugar. Supported by a strong marketing investment, the launch featured the boxer



“We’ve continued to invest in our soft drinks, delivering big campaign moments that resonate with our consumers and help drive category growth”

in a series of activations across Lucozade’s social channels, such as behind-the-scenes insights and product ‘unboxings’. “By partnering with world-class British athletes, we tapped into our sporting heritage,” notes Mistry. “Lucozade Alert helped to recruit more adult shoppers into the stimulation segment, driving both category reach and energy sales.”

‘There’s No Taste Like Home’

Ribena also took the spotlight this year with its ‘There’s No Taste Like Home’ campaign, with a £7m investment across TV, VoD, YouTube and 60,000 points of disruption in-store, making Ribena unmissable this summer. The brand’s refreshed positioning, grounded in its distinctive taste, evokes powerful childhood memories and the comfort of family moments. “By

dialling-up our roots, we focused on what makes Ribena special to our consumers,” says Mistry.

As one of the nation’s most loved soft drink brands, Ribena’s original and no added sugar blackcurrant squash variants are worth £46m⁵. Recently, Ribena Squash has outperformed the category, up 5.4% in volume, and up 10.9% in value⁶.

Together, Lucozade and Ribena offer retailers a must-have combination of trusted brands and sales-driving campaigns, giving retailers the confidence to capture shoppers across sports, energy and family occasions.



Source

¹⁻⁶ Suntory – executive report:
Nielsen, Various markets,
Various products, Various
measures, MAT and QTR to
23.08.25

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*Source: SBF GB&I sales data YTD - 30 w/e 26/07/25



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