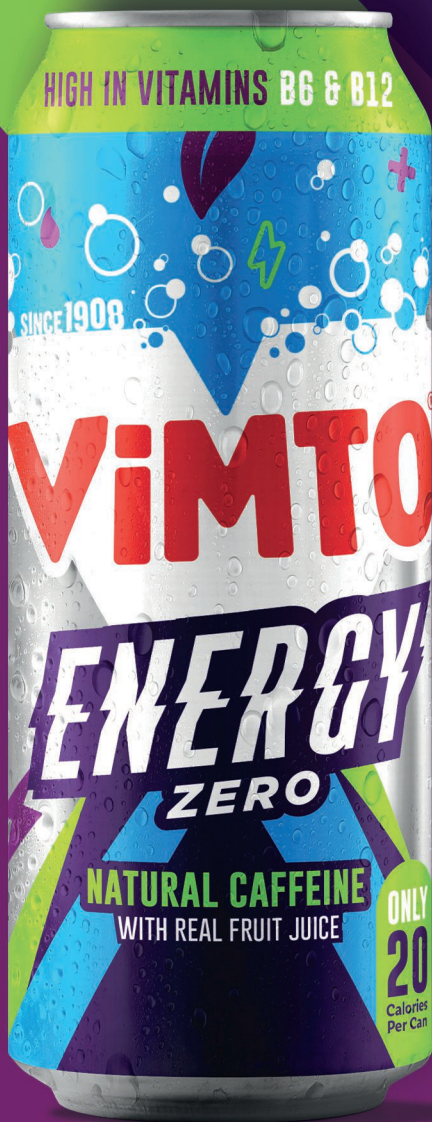


# Soft drinks

Nichols plc

# MAKING 2023 TASTE *better*



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Nichols

# Driving growth in a new era

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**SLUSH PUPPIE**

↙ New shopper behaviours, as well as changes to how consumers ‘consume’, driven by the post-Covid era, cost-of-living challenges and an increasing focus on ESG, continue to inspire the direction and future of soft drinks, says Nichols marketing director Angela Reay. “For instance, there are now nearly one billion more ‘in-home’ occasions than pre-2020<sup>1</sup>, with ‘on-the-go’ now also enjoyed at home.”

The soft drinks category remains resilient, as evidenced through value growth of 8.3% year-on-year<sup>2</sup>. However, to drive sustainable growth in this new era, it’s important to take inspiration from the past while looking to the future. This means harnessing the power of distinctive brands, while leaning into new needs and occasions through innovation, explains Reay.

**Brand power remains key**

In times of uncertainty, consumers turn to brands they know and trust, as seen in the emerging ‘kidulting’ trend, with adults increasingly seeking out nostalgic brands from their childhood.

“Established in 1908, Vimto has continued to evolve through the generations and is the 8th most chosen UK beverage brand<sup>3</sup>,” reveals Reay. “Taste is the most meaningful factor in driving brand power<sup>4</sup> – and our superpower is our unique taste across all brand formats, including our latest NPD, Vimto Energy. With £1 in every £3



“Vimto sales have grown by 57% in the last 10 years<sup>8</sup>, currently bought by 6.2million UK households<sup>9</sup>, with a brand value of £105m<sup>10</sup>”

spent on energy across impulse<sup>5</sup>, Vimto Energy has the unmistakable Vimto taste consumers love, while offering a permissible, low-calorie take – made with natural caffeine, real fruit juice, and B vitamins.”

**Category growth opportunities**

With the external landscape evolving at pace, ‘newness’ is critical to driving incremental value – worth over £76m<sup>6</sup> and contributing to 9% of value growth year-on-year, says Reay. “It is key to understand what trends will help deliver growth – with ‘sensorial experiences’ and ‘well-being as a lifestyle’ at the forefront,” she notes.

In flavoured carbonates, ‘enjoyment’ represents 86% of all occasions<sup>7</sup>, with consumers now looking to recreate out-of-home experiences at home. “In light of this, this year we launched Slush Puppie Fizzie, reimagining the frozen childhood ‘slushie’ classic, and creating a new carbonated format – with bold flavours and colours,” she says. “Leveraging a much-loved brand, we’ve tapped into the sensorial experiences trend, with an unexpected and fresh take on the original drink.

“In line with the ‘well-being as a lifestyle’ trend, we’re proud of our UK packaged portfolio, which is 100% HFSS-compliant, and also offers added nutritional benefits such as our fortified squash and energy.

“The soft drinks category can remain confident that it will continue to grow, and we look forward to working with our customers to realise this.”

Source

- <sup>1</sup> Kantar Usage, IH/CO occasions, occasions (% growth/decline), 52 w/e 16.04.23 vs 2019
- <sup>2</sup> Nielsen IQ, RMS data for the Total Soft Drinks category for the 12-month period ending 09.09.2023 for the GB Total Coverage market
- <sup>3</sup> Kantar Brand Footprint, Take-Home Panel, 2022
- <sup>4</sup> Kantar, brand equity evaluation, March 2023
- <sup>5</sup> Nielsen IQ, RMS data for the Energy category for the 12-month period ending 09.09.2023 for the GB Total Impulse market
- <sup>6</sup> Nielsen IQ, RMS data for the Total Soft Drinks category for the 12-month period ending 28.01.2023 for the GB Total Coverage market
- <sup>7</sup> Kantar, Usage Panel, % Share Servings, 52 w/e 11.06.23
- <sup>8</sup> Nielsen IQ, RMS data for the Squash, Flavoured Carbonates, RTD Still, and Flavoured Water categories for the last 10 years ending 09.09.2023 for the GB Total Coverage market
- <sup>9</sup> KantarWorldPanelOnline, MAT 11.06.23
- <sup>10</sup> Nielsen IQ, RMS data for the Squash, Flavoured Carbonates, RTD Still, and Flavoured Water categories for the 12-month period ending 09.09.2023 for the GB Total Coverage market



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## Analysis

# Healthy resilience

**Health and wellbeing of body and mind are the driving force behind many of the latest developments in the diverse soft drinks category. However, indulgence and self-treating are also proving a comfort in the currently harsh economic climate**

➤ The total soft drinks market increased in value by 8.8% across the first half of 2023, while reported volumes fell by 4.2%<sup>1</sup>, reveals AG Barr commercial director Jonathan Kemp. “Sustained price inflation has continued to feature across the market. Against this backdrop, we have gained both value and volume market share.”

Soft drinks are still enjoyed by 98% of GB households<sup>2</sup> and, while in many categories own-label has grown in importance as shoppers manage spend, soft drinks have remained resilient with shoppers seeking out big brands, says Rob Yeomans, vice-president of commercial development at CCEP GB. “CCEP’s soft drinks portfolio remains in volume and value growth<sup>3</sup>,” he says.

Squash has a strong foothold in the soft drinks category with 76% of households buying it<sup>4</sup>, says Princes

marketing director Jeremy Gibson. “This generally equates to a once-a-month purchase with single strength being the largest product type in value terms<sup>5</sup>,” he says. With squash being a category that’s consumed by most of the family once in the home, despite often being bought for specific family members, there is a shift in positioning from many squash brands as they look to target not just the younger or the older age group, but the whole family, he says.

In the smoothies market, challenger brands are disrupting the status quo, with more natural and healthier options coming to the fore. At Mockingbird Raw Press, which produces cold-pressed smoothies and juices, co-founder Chris Laidlaw points to a “significant squeeze” in the middle of the smoothie category. “Two key dynamics which we have

seen play out in previous recessions are repeating, with consumers trading down to private-label or trading up to the premium end of the category to treat themselves at home,” he says. “Whereas before they may have chosen to eat out, they are now looking for brands to help them replicate and enjoy those experiences at home in a more affordable way without compromising on taste and quality. We are also seeing continued accelerated growth towards healthier, more functional products across our category, as consumers continue to prioritise their health & wellness goals.”

Challenger brands are also entering the ready-to-drink (RTD) chilled coffee sub-category, reflecting the expansion and interest in RTD coffee and, in turn, the vast profit opportunity for retailers, says Adam Hacking head of beverages



**98%**

of GB households still enjoy soft drinks<sup>2</sup>

*Kantar*

**£1.8bn**

The value of energy drinks in GB<sup>iv</sup>

*Nielsen*

**+15%**

The growth of ready-to-drink coffee<sup>8</sup>

*Nielsen*

**£432m**

Projected value of the non-alcoholic market in the UK by 2027<sup>34</sup>

*Kantar*

at Arla, supplier of the Starbucks RTD Coffee brand. “The sub-category is currently valued at £280m and, with year-on-year growth of 14.6%<sup>6</sup>, is showing no signs of slowing,” he says. “The entry of challenger brands is set to drive consideration from new shoppers, which will consequently further grow the category’s worth. Within the space, Starbucks maintains its category-leading market share<sup>7</sup> and is constantly working to produce innovative product offerings.”

The RTD coffee segment continues to grow (+15%) and the Costa Coffee range continues to outperform it (+55%)<sup>8</sup>, says CCEP GB’s Yeomans. “In fact, over the last year, 89% of Costa Coffee RTD sales were incremental to the segment<sup>9</sup>. We continue to apply insights from our coffee shops to our RTD range to ensure it’s delivering what consumers want.

The arrival of Costa Coffee Oat Latte RTD is the most recent example of this.”

#### **Consumer purchasing patterns**

Consumer purchasing patterns continue to be shaped by the post-Covid era and subsequent cost-of-living challenges, says Nichols marketing director Angela Reay. “For instance, there are now nearly 1bn more ‘in-home’ occasions than pre-2020<sup>10</sup>,” she says. “Consumers are also having more quick and easy in-home occasions, meaning there’s a role for both on-the-go convenient soft drinks and larger pack formats<sup>11</sup>.”

Financial constraints continue to impact on consumer confidence and, ultimately, influence shopper buying patterns, says AG Barr’s Kemp. “For some, eating and drinking out of home is one of the first things to cut back on,

as consumers look to tighten their belts and this is leading to more in-home occasions.”

As a result, he says, shoppers are showing more interest in bigger pack formats, with events and celebrations continuing to generate seasonal peaks, as people look for more opportunities to socialise with family and friends at home. Cost-conscious consumers are also seeking the value that price-marked packs (PMPs) provide, particularly from quality brands they know and trust.”

Over the past year, we’ve noticed that price is clearly a bigger role in shoppers’ thinking and brands need to show they are worth paying more for and provide the right level of differentiation, says Belvoir Farm Drinks. “For example, Belvoir Farm’s non-alcoholic cocktail range continues to perform well with

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16% volume growth in the last year<sup>12</sup>. This has created true differentiation within the category, attracting a younger audience under 45 years of age, who normally under-trade within the category.”

Value is paramount in today’s economically strained environment, says Ash Chadha, sales & marketing director at Asco Foods, UK&I distributor of the Mogu Mogu brand. “We’ve maintained stable prices for over two years despite the rising food inflation. We also offer consistent pricing for our six-pack bundles across our e-commerce platform and TikTok shop, despite additional platform fees, which resonates with those seeking both convenience and value.”

In energy drinks, it is critical for brands and retailers to offer competitive pricing as economic uncertainty continues to influence the purchase decision-making process, says C4 Energy. “Recent research uncovered that 42% of consumers have followed a stricter shopping list, and 35% bought more reduced items<sup>13</sup>,” it says. “Our strategic approach involves launching price-marked packs at £1.59 within our performance energy range, demonstrating our commitment to providing consumers value in the market, while ensuring robust margins for our retail partners.”

At Mockingbird, Laidlaw says the company is seeing consumers preferencing products that support their health. “That is playing out in our category by the flavour and ingredient combinations they are selecting,” he notes. “Our 750ml Raw Greens smoothie, which contains over 20% vegetables with superfood ingredients such as spinach, kale and broccoli is the top-selling SKU of the smoothie category in four retailers<sup>14</sup>.” He believes this is because it is packed with nourishing savoury ingredients as opposed to the “fruit-heavy alternatives which previously led the category”.

In the coffee sector, Arla’s Hacking reports that despite the pressure on shopper budgets, caused by the cost-of-living crisis, premium products are continuing to grow in popularity, with 180,000 litres sold compared to 50,000 at the same time last year<sup>15</sup>. “With a view to treating themselves and buying into well-known brands they recognise from the high street, consumers are willing



to pay more for their favourite brands if they feel they will receive consistently high-quality products,” he says.

On-the-go shopper missions are back in full swing, particularly during ‘with food’ occasions, says Britvic retail commercial director Ben Parker. Retailers are creating compelling snack or meal deals by offering leading brands in categories such as carbonates and juice drinks, he says. “Shoppers will be on the lookout for a variety of choice; soft drinks options that offer low- and no sugar, as well as those innovating with bold flavours, will perform well.

There is an opportunity for retailers to demonstrate value to their shoppers by incorporating fruit juice and juice drinks into their meal deal offerings, says Purity Drinks CEO Sarah Baldwin. “Already a growth driver in the sector, amplifying meal deal offerings with the additional benefits of drinks in the category can help to make them stand


out to those shoppers who are seeking greater value.”

### Health and wellness boost growth

A key trend we’re seeing is the rising interest in healthy soft drinks,” says Purity Drinks’ Baldwin. “Health benefits are now within the top five reasons people are choosing a beverage, with 65% of consumers considering their health and wellness when purchasing products<sup>16</sup>. We made the decision in 2017 before the Soft Drinks Industry Levy was introduced, to never include added sugar in any Purity Soft Drinks products. Since taking this decision, Purity Soft Drinks has doubled in volume over the past seven years and we’re continuing to grow. In fact, we are the fastest-growing supplier in the top 20 soft drinks manufacturers in the UK by volume, up 19.4% in the past 12 months<sup>17</sup>”

With 69% of consumers now claiming to be proactively leading a

# Self-treating in a tough climate



Familiar comforts have an important role to play during uncertain times, says Nichols' Reay. "With the fallout from the pandemic and subsequent economic crisis set to endure for the near future, consumers will continue to seek out and value trusted brands and flavours, which reconnect them with nostalgic moments," she says. 'Kidulting' is a new and growing trend among adults who are ... seeking solace through experiences that once brought them joy.

Consumers are continuing to spend more time at home both for work and

play, she adds.

"Particularly as we approach the festive period, shoppers will be looking for affordable ways to treat themselves. Great-tasting soft drinks are well placed to deliver against this; both recognisable and distinctive flavours will be key for creating comfort, escapism and exploration for those shoppers seeking affordable treats."

The trend towards nostalgia has risen exponentially in the past 12 months, with many consumers happy to reminisce through the types of products they buy<sup>i</sup>, agrees

Princes' Gibson.

The company has responded to this with the launch earlier this year of Swizzels Squash, which he says meets the demand for products that deliver strong value for money, taste great and satisfy the needs of the whole family<sup>ii</sup>. And despite a standing start just eight months ago, Swizzels Squash is now worth £2.6m<sup>iii</sup>, he says.

"Shoppers are switching from expensive purchases to treating themselves with small indulgences, otherwise known as the 'lipstick effect'," says Britvic's Parker.

"This presents opportunities for retailers to take advantage of shoppers on a treating mission."

There are cheaper cordials than bottlegreen, cheaper squashes than Rocks and cheaper carbonates than bottlegreen pressés, says SHS Drinks' Lawson referring to the company's portfolio. "And yet consumers continue to purchase amid a cost-of-living crisis as these brands are respected for their high-quality ingredients. They don't change the world, but they do make it just a tiny bit better."

healthy lifestyle<sup>18</sup>, this has delivered strong growth for brands like Moju, says CEO & co-founder Rich Goldsmith. "The concept of managing preventative health has become a mainstream trend," he says. "And while immunity remains the No.1 priority for consumers<sup>19</sup>, gut health is very much on the rise; Google searches in this area have trebled since 2021 and the kefir category has grown value sales by 21% year-on year<sup>20</sup>.

"Consumers are becoming more aware of their longer-term health, reducing sugar and caffeine consumption by 30% in the past year," he adds. "Meanwhile research into the dangers of ultra-processed foods and sweeteners such as aspartame<sup>21</sup> have led to mainstream and social media frenzy and supported the growth of brands delivering cleaner labels with whole food ingredients.

"And finally, hybrid working and a higher frequency of skipped meals

means consumers are relying on more hyper-convenient options like Huel meal replacement drinks and Moju functional shots to fill nutrient gaps."

While the 1990s was characterised by the rise of energy drinks, we're now seeing a cross-generational shift towards focusing on your mental wellbeing and holistic health, says CBD brands supplier Trip. "People of all ages are looking for drinks that taste great and are authentically functional. You can see this in the increased demand for products with adaptogens, CBD and added health benefits.

"We're also seeing an increase in demand for no/low-alcohol alternatives: 61% of people who have purchased Trip say it is because it is alcohol-free<sup>22</sup>. During dry January, we saw an 800% growth in sales vs January 2022 and experienced viral growth on social media with over 50 million impressions on TikTok and Instagram<sup>23</sup>"

Low and zero sugar now make up

67% of our soft drinks sold in GB<sup>24</sup>, reveals CCEP GB's Yeomans. He says this is evident in the performance of the company's zero sugar variants in flavoured carbonates (in volume and value growth)<sup>25</sup>, as well as in energy drinks, with Monster Ultra the No.1 zero sugar energy brand in GB<sup>26</sup>.

Key trends include a preference for low-sugar and functional drinks, says Colin Stevenson managing director at Selected FMCG, distributor of the Mentos range of drinks. "With an emphasis on low sugar and natural ingredients together with jelly bites, the drinks have really captured the imagination of consumers," he says.

"Consumers are increasingly looking for low-sugar, high-protein and vitamin-enriched options," says Maria Ledesma, trade marketing manager UK&I at Vitamin Well. RTD coffees and mocktails are gaining popularity, showing a growing demand for on-the-go alternatives to traditional

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drinks. Consumers are willing to pay a premium for products that offer health benefits and a sense of indulgence," she adds.

Aqua Carpatica agrees that health is still a key macro trend, but notes that, in the new economic reality, consumers seek solace in smaller indulgences that provide a sense of comfort and self care. "They serve as reminders that even amid challenges, it is important to prioritise one's well-being and find joy in the little things, ideally combining the two," it says.

Proactive health is increasingly taking centre stage as consumers move away from a one size fits all approach to one that prioritises health needs, it adds. "Gone are the days when indulgences and meeting very specific needs (such as no aspartame) were considered mere 'nice to have' extras. Now, these have transformed into essential 'should-haves' and are becoming 'must-haves' in the eyes of discerning consumers and, despite the economic crisis, they are willing to trade up if the product meets their needs."

Mockingbird's Laidlaw agrees that a health-motivated consumer is willing to pay more if a product meets their high quality and nutritional expectations. "The establishment of Mockingbird Raw Press as a premium tier in the smoothie category in the past few years demonstrates this," he says.

Ninety-four per cent of adults are trying to eat more healthily<sup>27</sup> and 75% are happy to swap for a healthier option if it's tasty<sup>28</sup>, reveals Grenade managing director Phil Greenhalgh. As such consumers are looking for healthier options to their breakfast drinks or smoothies and the total protein drinks category is in 32% growth as a result<sup>29</sup>.

The growth of the wellness industry and people looking to reduce their alcohol intake are the two major global trends that have fuelled the growth of Trip, which is bringing CBD products to the mainstream, it says. "Over the past year, the business has grown by 522%<sup>30</sup> and in the last three months Trip has become the fourth-largest volume contributor to the entire soft drinks category<sup>31</sup>," it says. The UK is more stressed than ever and people are looking for high-quality products that help them manage their stress conveniently on a daily basis. Also, one in two Gen Z consumers state they have

## Consumer behaviour shifts drive growth in functional and energy drinks

"We used to refer to energy drinks as an emerging soft drinks segment, but energy has now well and truly emerged as a powerhouse of the soft drinks category," says CCEP GB's Yeomans. "Energy drinks are now worth a massive £1.8bn in GB. Monster has been at the forefront of that, now worth £546m<sup>iv</sup> and in 20.3% value growth and 19.5% volume growth<sup>v</sup>, making it GB's fastest-growing major energy brand<sup>vi</sup>," he reveals.

More retail space is being given to functional drinks in the last year, with a wide range of options for shoppers including gut health, vitamins, CBD etc, says Belvoir Farm. "Added health benefits is a key market trend currently and many brands are capitalising on this with new ranges and opportunities in retail."

CBD drinks supplier Trip says that volume growth in the functional drinks category is due to increased penetration and fundamental shifts in consumer behaviour, whereas much of the wider soft drinks growth

has resulted from price inflation. "This suggests that consumers are looking for products that support their holistic health, from their mental wellbeing to helping them live healthier lifestyles," it says. "Trip is one of the only consumable brands that genuinely caters to this rising demand."

C4 Energy has grown its brand awareness to 44% in the UK and is breaking into the top brand status (sports energy category) in major UK travel retailers in just 10 months since launch<sup>vii</sup>, it says. "This builds on the continued success within UK gym chains where we're the No.1 selling energy brand<sup>viii</sup>," adds the company.

The company points to a fall in popularity for traditional caffeine-based energy drinks in recent years, with consumers opting for alternative options that offer elevated health and functional benefits, it says. "To maximise this market shift, an increasing number of brands with the energy drink category are adopting or continuing to grow

their offering to deliver products that contain less salt, carbs and calories without trying to compromise on taste. "We anticipate that on-the-go energy drinks options will continue to generate strong sales as we head into 2024 and beyond," it adds. However, the transparency and traceability of a product's contents will be an increasingly important factor and crucial for brands to communicate.

"We're observing a growing trend in consumers seeking healthier beverage alternatives with a focus on functional and vitamin-enhance drinks," says Maria Ledesma, trade marketing manager UK&I at Vitamin Well. "More consumers are shifting from traditional carbonated soft drinks to options that offer added benefits like vitamins and minerals."

However, even carbonated soft drinks are now offering energy options. "Consumers are looking for solutions that meet multiple needs," says Nichols' Reay. "Our new Vimto Energy





is a great example of how we are evolving our portfolio to deliver a multi-benefit proposition – offering consumers a source of natural energy B vitamins, no added sugar and the unmistakable Vimto taste.”

Better for you soft drinks, providing targeted health benefits, such as gut health, immunity and protein to name a few, continue to see growth ahead of total category performance, says

Moju’s Goldsmith. Functional health drinks – juice shots, CBD, protein, kombucha and kefir – are growing at 18.9%<sup>ix</sup> vs soft drinks rising by 9.8%<sup>x</sup>, he notes.

Despite this there are four key consumer barriers to choosing healthier options, which brands and retailers need to overcome, he says. Emerging functional health drinks tend to have lower awareness than incumbent soft

drinks brands, so he believe retailers should back trusted and familiar category-defining brands like Moju, which is investing in building awareness and trust in the sector and delivering on health promises such as lower sugar per serve and clean ingredients.

Functional health drinks are also less visible in-store, often located across multiple fixtures and are under-spaced he says. “Make them

more visible, with a greater share of fixture, especially for high rotation challenger brands that bring innovation and excitement to the category.”

Consumers often don’t have a clear understanding of the different functional health benefits, so retailers should make it easy for shoppers by merchandising functional drinks together with a shopper-centric mindset and

make them more relevant by clearly signposting health benefits and occasion at shelf.

And finally, while consumer tastes are changing towards less sweet profiles, there can be a perception that healthier soft drinks options have less indulgent or niche taste profiles. “The winners in functional health are managing to deliver taste/flavour and strong health credentials,” he says.

## Analysis

tried CBD instead of alcohol<sup>32</sup> and 22% of people say they are more likely to try an alcohol-free drink if it contains CBD<sup>33</sup>.

The move towards alcohol moderation continues to offer incremental opportunities to soft drinks and particularly so to the more 'grown-up' brands, which sit more comfortably as alcohol alternatives, says Sarah Lawson, head of marketing – softs at SHS Drinks. The company offers the Shloer range, and Lawson says the shining star at the moment is Shloer Pink Bubbly – a “celebratory soft drink for cork-popping moments”, as well as the brand’s first-ever zero-calorie product Shloer Zero.

However, the overarching trend is the blurring of boundaries between categories, she adds. “So that means things like RTD mocktails and non-alcoholic mixers to help consumers make easy cocktails at home. Cordials are also part of this movement towards at-home cocktails as more and more people realise they are perfect as highly versatile, flavour-packed ingredients. “Within the adult soft drinks segment, specifically, the key trends are the continual desire for interesting new flavour combinations and consumers’ ongoing quest for great-tasting lower calorie drinks.”

### Flavours: tropical stays topical

2023 really is the year of flavours, according to AG Barr’s Kemp.

“Consumers are still coming out of post-pandemic behaviours and want to enjoy bigger, bolder experiences. In soft drinks this is all about seeking more interesting less run-of-the-mill flavours, which excite the taste buds.”

“Taste remains key in relation to choosing a soft drink, and new flavours are driving growth across the category. Retailers stocking unique and exotic flavour combinations, will drive more engagement and interest in their soft drinks fixtures, increasing basket spend and encouraging repeat purchase,” he adds.

Core flavours continue to dominate adult soft drinks and cordials with elderflower & ginger, ginger beer and raspberry are still relevant to shoppers, says Belvoir Farm. “We are seeing more tropical flavours becoming popular as shoppers look for more exotic options,” it adds, noting that the company has



recently launched a range of no added sugar cordials, which includes a Mango & Passionfruit version.

At Britvic, Parker reveals that Pepsi Max has expanded its range with a Mango version, while the company has maintained momentum on its Tango Editions rotational flavour series with launch of Tango Paradise Punch Sugar Free – an orange, mango and tropical blend. For its Rockstar Energy range, it has launched two zero-sugar flavours Rockstar Refresh Strawberry & Lime and Watermelon & Kiwi, while in its J20 ready-to-drink mocktails, the company has added Strawberry & Orange Blossom Mojito, White Peach & Mango Daiquiri and Blackberry & Blueberry Martini. The non-alcoholic market in the UK has been growing steadily in recent years, with a third of UK adults abstaining from alcohol entirely<sup>34</sup> and

is projected to reach a valuation of £432m by 2027<sup>35</sup>, he adds.

One of Aqua Carpatica’s key drivers for growth was the extension into flavoured versions of its waters, reveals the company, with four products that “meet consumer demand for natural ingredients and no added sugar”. The Aqua Carpatica Flavours range includes Lime & Mint, Mango & Peach, Strawberry & Elderflower and Raspberry. This strategic move allows us to cater to a wider range of consumer preferences, it says.

AG Barr’s Kemp says limited editions create real impact at the point of purchase and generate a ‘get it before it’s gone’ mentality. New soft drinks flavours always lead to animated discussions, especially in relation to unique flavour combinations that are new to market. He points to the success



of the company's Irn-Bru Xtra Tropical and Ice Cream flavours this summer, which he says enabled retailers to maximise the seasonal sales peak.

In juices, meanwhile, classic flavours such as orange and apple continue to do well, says Purity Soft Drinks' Baldwin. The tea-flavoured juice category is also performing really well, growing ahead of the total soft drinks category year-on-year<sup>36</sup>, she reports. In August, the company expanded its Juice Burst brand with the addition of Juice Burst Peach Ice Tea – a blend of peach juice and black tea flavouring. “The innovation is set to be a hit with families and children by offering a healthier, great-tasting permissible juice drink option that is both schools- and HFSS-compliant,” she says.

Innovative flavours are also helping to drive the energy drinks sector. CCEP

GB has introduced Monster Ultra Peachy Keen, which taps into the popularity of the peach flavour, reveals Yeomans.

In protein drinks, Grenade's latest innovation, inspired by its protein bars, is its Salted Caramel protein shake. This joins existing flavours such as Fudge Brownie, White Chocolate and Strawberries and Cream, reveals Greenhalgh.

In the contemporary UK market, there's a pronounced inclination towards flavours emblematic of classic American confectionery, mirroring an elevated appreciation for transatlantic sweets and snacks, says Asco Food's Chadha. As such, the company has announced the upcoming launch of Bubble Gum and Cotton Candy flavours to its Mogu Mogu range.

Other companies developing soft drinks brands on the back of popular sweets include Princes with its newly launched Swizzels Squash range. The flavours in the range are based on Swizzels' most popular sweets: Drumstick, Love Hearts, Parma Violets, Lemon and Sour Apple Refreshers and Bubblegum and Sour Cherry & Apple Squashies. “Each of these original sweets continue to be stalwarts in the British confectionery category... and we foresee the continued popularity of these nostalgic flavours over the next year.” However, the company also recently launched a limited-edition Berry Boo flavour just in time for Halloween, with berries and cherries flavours in spooky packaging.

Moju's Goldsmith says the company has seen significant interest and growth in functional natural ingredients such as ginger and turmeric. “In fact, ginger shots have quadrupled since 2021,” he says. “Moju is using these ingredients to offer a more natural way to support functional health and differentiate from the rest of the drinks category by championing more sophisticated flavour profiles, relying less on sugar and more on complex flavours.”

In coffee, meanwhile, sweet flavours are proving the most popular this year, says Arla's Hacking, with chocolate and caramel the fastest-growing flavours in the last 52 weeks. Chocolate and mocha products have grown nearly 70% while caramel has grown 30%<sup>37</sup>, he reveals. “Caramel Latte is the most popular flavour in value sales, worth

over £14m<sup>38</sup>, while caramel macchiato has seen year-on-year value growth of 67%<sup>39</sup>, spearheaded by the launch of Starbucks Multiserve Caramel Macchiato 750ml in 2022.”

### The pursuit of ESG

Recent research has revealed that consumers are spending longer than ever researching the ethics, values and environmental sustainability of brands before making a purchase and 70% say they are willing to pay a premium for value-led brands<sup>40</sup>, says Moju's Goldsmith. Moju bottles are currently 100% recyclable and are made with 50% rPET, he says. “We continue to work towards a goal of 100% rPET. Moju is also a founding member of 1% for the planet and donates 1% of its revenue to planting healthier air in UK schools in partnership with Trees for Cities.

Nichols' Reay points to the company's 'Happier Future ESG strategy' which she says is organised into three pillars: Everyone Matters; Owning Our Climate Impact; and Products We're Proud Of. “We have already made significant strides across the four pillars of our packaging strategy; highlights include all of our UK packaged drinks range is 100% recyclable, while 40.5% of our UK packaged portfolio contains 51% recycled rPET and we are striving to reach 100% sustainably sourced rPET by 2025.”

Additionally, she says, Nichols has a strong track record in reducing carbon emissions, ensuring it is well placed to deliver on its commitment to reduce absolute Scope 1 and 2 greenhouse gas emissions by 25% by 2025. “Also in 2022, we collected Scope 3 emissions data across our UK supply chains and are well on our way to defining our roadmap to net zero for our UK operations.”

Purity Soft Drinks continually reviews its approach to sustainability and ways it can minimise its impact, says Baldwin. “Our packaging currently comprises 30% recycled rPET and we are committed to going further and entirely support the move to a fully-looped recycling system. We are currently testing tethered caps and plan to roll this out to all packaging in the current financial year. We are also road-mapping our net zero journey, including work to establish our Scope 3 carbon footprint.”

## Analysis

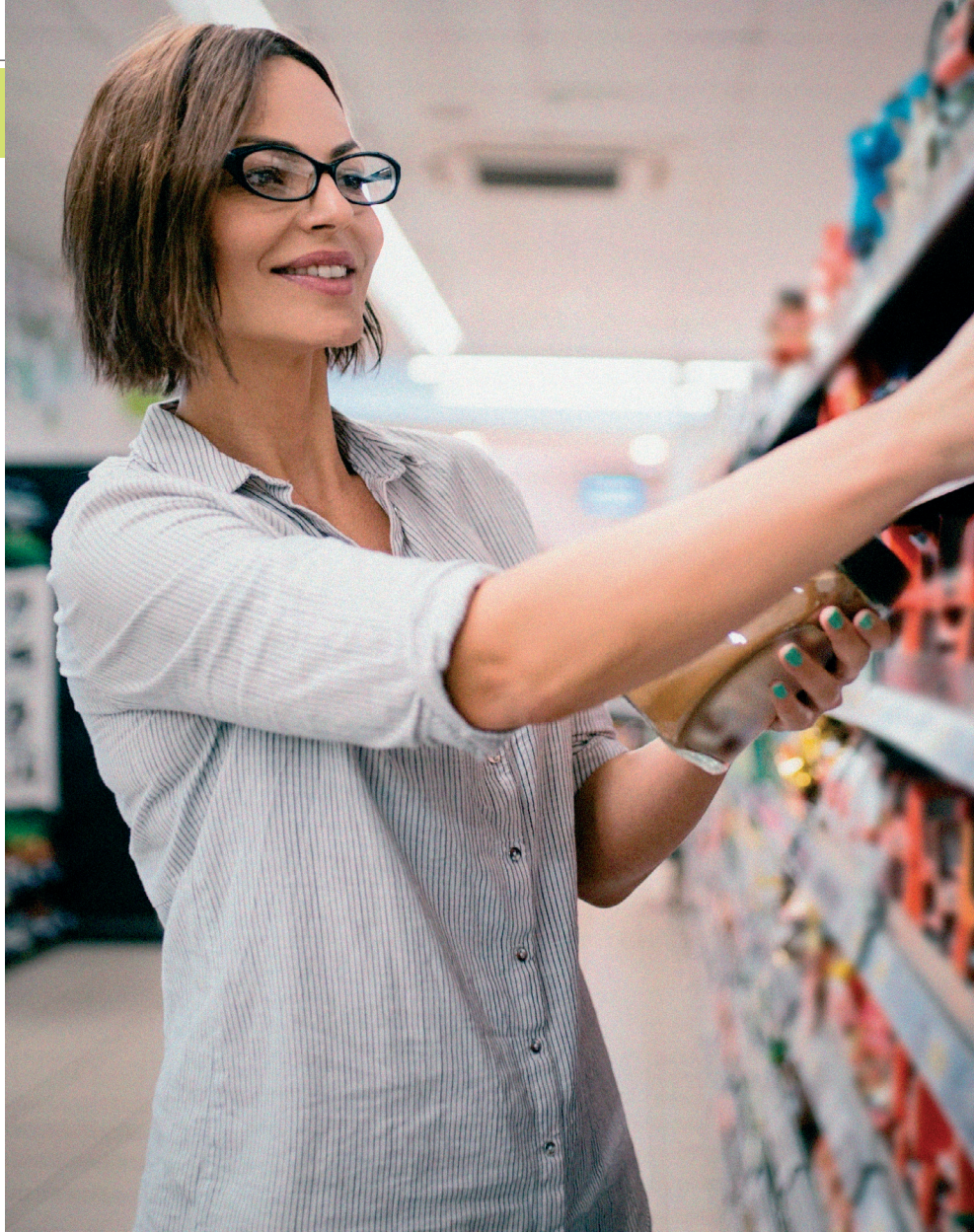
ESG is now a strategic priority within the Refresco Group, says head of marketing Joe Major. The company's priorities centre on creating a safe and great place to work; reducing GHG emissions in its operations and supply chains; water protection and efficiency; reducing waste; sustainable packaging; and promoting responsible business practices along the value chain, he says. "To help reduce GHG emissions, we launched our JuiSea Shipping project in August last year, a collaboration between Refresco and Trilobes," he reveals. "JuiSea Shipping charters a vessel that has been made into a floating terminal for juices. The vessel sailed 36 times in its first year between the European mainland and our Bridgwater facility. We previously transported juice by road, so JuiSea Shipping reduces the number of trucks on the road by 2,000 every year, leading to a 90% reduction in CO<sub>2</sub> emissions," he says.

In addition, Refresco has completed projects to lightweight its packaging, use recycled content and make more packaging recyclable by removing coloured plastic and introducing tethered caps. Using the latter across its sport lids products has led to a 31% reduction in plastic content, he notes.

Attached caps have also been introduced at Vitamin Well, making it easier to recycle the whole bottle and help prevent litter, reveals Ledesma. "The proposed Deposit Return Scheme (DRS) is a positive step towards promoting recycling and reducing waste. We believe it will have a significant positive impact on the soft drinks category, encouraging responsible consumption and recycling."

Other companies also advocating the importance of the DRS include Selected FMCG which is closely monitoring developments to ensure compliance and reduce the company's environmental footprint, says Stevenson. "We believe consumers are fully on board with the idea of DRS, as long as it does not result in the price of drinks increasing due to the implementation."

Both Belvoir Farms and SHS Drinks have introduced more readily recyclable cans to their ranges, with Belvoir Farms offering its non-alcoholic cocktails in 250ml cans and SHS Drinks



introducing cans on Shloer Zero, which Lawson says will reduce the carbon footprint of its range from being a glass-only offering. Other activity at the company this year includes the launch of its Group Environmental Policy to address five strategic themes: energy, waste, water, packaging and sustainable sourcing. The company has also reduced its Scope 1 and 2 emissions by 40% since 2019, she notes.

This summer, C4 Energy initiated a partnership with the REORG charity, launching its Pineapple Head range to support a community dedicated to military veterans and emergency responders, it reveals. As well as supporting the charity, the flavour expands on the company's fruit-based flavour range, which includes watermelon, mango and red berry yuzu.

In the past year CCEP has accelerated its work to reduce its own carbon emissions and has taken strides to bring suppliers partners and customers

along on the journey, reveals Yeomans. "We aim to reach net zero across our supply chain by 2040 and reduce our greenhouse gas emissions by 30% by 2030 (vs 2019)," he says. The company is testing out new concepts on packaging, including trialling refillable bottles in partnership with Milk & More, to find innovative and sustainable ways of delivering soft drinks to consumers.

Having initially introduced attached caps to its plastic bottles in partnership with Coca-Cola GB in 2022, enabling them to be recycled together with the bottle, the roll-out of this initiative across its portfolio will be completed by the end of 2024, he says. "This development is in addition to the fact that all our bottles are recyclable and our 500ml or less on-the-go bottles are made using 100% rPET<sup>41</sup>."

"Research suggests that 60% of consumers feel sustainability is the responsibility of producers<sup>42</sup>, so we have a big opportunity in our hands to



## In-store activation yields benefits

Interactivity is pivotal to in-store experiences, says Asco Foods' Chadha. The company embarked on a nationwide summer sampling tour across major cities in England this year to introduce to consumers its Mogu soft drinks, which combine exotic fruit flavours with nata de coco. Stationed outside Asda supermarkets and Sainsbury's Locals, the company also enhanced the engagement with a coconut shy "allowing shoppers to immerse themselves in the playful essence of our brand, all

while enjoying free giveaways and social interactions", he says. This allowed the company to expand its reach and target different occasions and demographic groups, and helped it achieve sales of 371m bottles in the 12 months to the end of September 2023, he reveals.

"Engaging shoppers in-store is key to driving brand consideration and, in turn, purchase," says Arla's Hacking. "This summer Starbucks Chilled Coffee took its products on tour, providing Tesco customers with the opportunity to sample a host of SKUs along with

rewards such as gifts with purchase, money-off coupons and the opportunity to win Clubcard points," he says. This activation saw the brand engage with over 400,000 customers, creating a 15% rise in trial to sales conversion<sup>xi</sup>, he notes. Sampling was also carried out in Asda stores, proving that engaging activations lead to a boost in sales, as the likelihood of purchasing Starbucks Chilled Coffee whether on the day of activation or in the future, increased from 39% to 88% among other results<sup>xii</sup>.

"Creating

in-store theatre and excitement is an integral part of our marketing mix," says AG Barr's Kemp. "We invest heavily in a suite of vibrant, eye-catching POS material to create standout for our brands, also driving shoppers to the fixture."

"Engaging consumers in-store through sampling and eye-catching displays is essential" agrees Selected FMCG's Stevenson. "We focus on eye-catching merchandising and promotions that highlight our Mentos range's distinct flavours and uniqueness."

influence behaviour and set the bar high in the soft drinks market," he adds.

### In-store standout

With many different format variations, flavour innovations, packaging updates and limited editions all coming to the fore, the soft drinks category is experiencing an exciting boost at the moment, says Princes Gibson. "However, this can be overwhelming for shoppers. For example, the introduction of double and quadruple strength squashes did cause some confusion for shoppers when they first arrived on shelves, especially around the understanding of how to dilute this completely new proposition. This proved to many how imperative it is as a brand to be as clear as possible when it comes to product range and how sometimes less is more when standing out on the shelf," he says.

"Also, many shoppers find themselves on auto-pilot when going around the

aisles, so anything that interrupts this repetitive purchasing journey at the fixture point is crucially important. A strong product message, eye-catching branding, appealing price point, limited time reduction or bold NPD activation lend themselves well to this."

There are undoubtedly areas of consumer confusion, agrees SHS Drinks' Lawson. "It's down to suppliers and retailers to focus on education so as to create a better understanding," she notes. "The issue is most pronounced among some of the more peripheral segments. Cordials are a good example: 'Are they just squash? How do I use them? What can you do with them?'" The company has designed a campaign 'Add a Dash of Extraordinary' to inspire consumers to use its bottlegreen cordials to create mouthwatering serves for both alcoholic and non-alcoholic drinks," she reveals.

However, while big campaigns are important, so are the more logistical

aspects, such as merchandising complementary drink types next to each other – be that soft drink mixers near alcohol, or cordials near sparkling water," she adds. "Suppliers can also signpost and inform through packaging clarity. "When we launched calorie-free Shloer Zero last year, we took this insight fully on board and prominent Zero branding ensured the new proposition was readily understood by consumers and clearly differentiated on-shelf from the rest of the Shloer range," she says. "There's really no point in giving consumers choice and then making it hard for them to distinguish between the choices."

CCEP GB reveals that it is working on a project called 'Soft Drinks Aisle of the Future', which Yeomans says is helping to improve navigation and education at fixture, enhancing inspiration to support smaller segments or NPD and placing more emphasis on sustainability. "An example of this

## Analysis

is the recent rollout of navigational header boards in partnership with some customers,” he says. “Early feedback from shoppers and customers is that they are making the fixture easier to shop and improving the overall experience.”

Over and above signposting by segment, he believes simple education at fixture is important to highlight functional or sustainable benefits, ingredients or innovation and says that phones could have a role to play here, with people scanning QR codes or barcodes at the fixture for more information.

Shoppers who buy into premium drinks have an occasion in mind first, says Belvoir Farm. In sparkling adult drinks, social and special occasions play a prominent role and shoppers will look to brand to fulfil that. More premium brands should be grouped together to create a space that is most relevant for special occasions to create a clearer and easier shopping mission.”

Fixtures need to be easy to navigate as, with a range of brands and products to choose from, the category can feel crowded, says Britvic’s Parker. Ensuring products are stocked by sub-category – carbonates, energy, water etc, stocking up on core ranges and then building these out with limited-edition or flavoured variants will help keep shoppers engaged, he notes.

“Utilise point of sale on beacon brands to create standout on shelf, as this will attract shopper attention and drive visibility”, he adds. “In turn, this could result in an unplanned impulse purchase. Merchandising complementary categories together – for example soft drinks and main meals or snacks – can help drive cross-category purchase, while retailers should also think about seasonal peaks, such as Christmas and merchandise accordingly.”

Flooded with high levels of duplication, the smoothie category is driven by two key brands, which are made in the same way with similar flavour profiles, which can be confusing for consumers to distinguish between, says Mockingbird’s Laidlaw. “As a result, the category is highly reliant on price promotions with high consumer switching. Consumers need exciting new propositions and genuine innovation to keep them interested at



fixture, as well as a structure of good, better, best to drive trade up and value into the category. At Mockingbird, we spend a considerable amount of time focusing on our label design to drive standout at shelf and consumer engagement.”

Purity Soft Drinks’ Baldwin has a salutary lesson on how the impact of packaging can make a difference on-shelf. “This year we conducted a review of the firefly brand, launching new packaging and a new visual identity... as we look to establish ourselves further in the adult soft drinks market,” she says. “We knew that our product is really good, but our packaging didn’t necessarily reflect the essence of the brand. Consumer research showed that they liked the product but it wasn’t what they expected. The vibrant colours [of the pack] were suggesting the liquid would be strong in flavour and full-on but that’s not the case – it’s delicate. So we repositioned firefly as a subtle, refined drinks for still moments, with a transparent bottle, reflecting our brand’s transparency and natural values. Since our brand review, firefly has grown at an impressive 30% year-on-year, three times as fast as the total ‘drink now’ category<sup>43</sup>.”

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  - <sup>40</sup> <https://tinyurl.com/576uaxp2>
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- Self treating**
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- In-store activation**
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  - <sup>xii</sup> Starbucks & Asda In Store Activation Results, August '23

TRIP Drinks

# TRIP leading functional drinks

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**TRIP Drinks**  
– Elderflower Mint  
– Peach Ginger  
– Lemon Basil  
– Cold Brew

**TRIP Oils**

– Orange Blossom  
– Wild Mint

Source

- <sup>1</sup> TRIP Consumer Survey 2023
- <sup>2</sup> Nielsen IQ, Total Market, Total Drinks Value YoY, Brands > £1m RSV, 12w/e 11.02.23
- <sup>3</sup> IRI, Total Market, Total Drinks Value YoY, Brands > £1m RSV, 52 w/e 09.09.23

When Trip launched in 2019, functional drinks and products that aid stress were niche and hard to find outside of health food shops or independent pharmacies. Having had a personal experience of CBD's transformational benefits, co-founders Liv Ferdi and Dan Khoury decided to leave their jobs to do something about it.

Previously, one of the biggest barriers to customers entering the CBD category was flavour and format. However, Trip is challenging this with its proprietary blends of CBD with functional botanicals to deliver a unique effect. With every product Great Taste award-winning, Trip has brought the mainstream soft drinks consumer into the functional category by transforming perceptions of flavour compromises when prioritising health.

Trip's mission is to help millions of people around the world find their calm. This is because Trip believes mental health is integral to good health.



“TRIP's mission is to help millions of people around the world find their calm”

In surveys, 93% of Trip customers say the products help them manage their stress & anxiety<sup>1</sup>. And via almost 10,000 reviews and daily conversations on social media, people proactively share how Trip helps them reduce anxiety and improve sleep. Now the world's No.1 CBD drinks brand<sup>2</sup> and the UK's fastest-growing soft drinks brand<sup>3</sup>, Trip is bringing CBD to the masses.

# TRIP

CBD INFUSED

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#1

Largest CBD drinks brand in the world<sup>1</sup>

#1

Fastest growing UK soft drinks brand<sup>2</sup>

#1

Driver of functional drinks growth in UK<sup>3</sup>



1 & 3. Total Market, Nielsen IQ, Total Drinks Value YoY, Brands > £1m RSV, 12 w/e 11/02/23.  
2. Total Market, IRI, Total Drinks Value YoY, Brands > £1m RSV, 52 w/e 09/09/23.

AG Barr

# Greater consumer connection

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**IRN-BRU**  
**RUBICON**  
**RUBICON RAW**  
**STRATHMORE**  
**BARR FLAVOUR**

As the £11.7bn<sup>1</sup> soft drinks market remains one of the most profitable for retailers, AG Barr is focusing on connecting more closely with its growing consumer base, says commercial director Jonathan Kemp.

The company has invested heavily in forging new market opportunities, and has also targeted new consumption occasions, providing great brands which offer value for money, and all-important choice, for today's cost-conscious consumers, he reveals.

"We're seizing the opportunity to generate profitable future growth," says Kemp. "Taste remains the single most important factor in soft drinks' purchasing, and we are continuing to focus heavily on delivering exciting, flavour choices, driving consumers to our brands in record numbers."

NPD and innovative marketing support build excitement among consumers, typified by AG Barr's support for strong-performing Rubicon Raw and Pwr-Bru, two energy drinks that have been quick to make their mark in the biggest and most profitable 'drink now' segment for retailers, he adds.

Fresh from its success as The Official Energy Drink of the UK's biggest surf and music festival, Boardmasters, Rubicon Raw is now hitting the slopes with a GB Snowsport on-pack promotion. "As the official energy drink of GB Snowsport, we are reaching millions of snowsports fans across the UK," says Kemp. "As part of our



**"Taste remains the single most important factor in soft drinks purchasing and we are continuing to focus heavily on delivering exciting flavour choices"**

partnership, we are giving consumers the chance to win the 'Ultimate Snowsport Experience', including a lesson with a GB athlete, a week's skiing holiday and £1,000 cash, driving awareness and excitement with consumers shopping the energy drinks fixture. There's no better way to kick off the snowsport season than with an unmissable offer like this."

The promotion is running on more than two million cans, across all plain and price-marked 500ml packs and some 4x500ml multipacks, until the end of November.

With the energy drinks market one of the most profitable for retailers, Rubicon Raw has established itself as a must-stock brand within it, he notes. "Selling more than 35 million cans since launch<sup>2</sup>, it has become the second most successful innovation launch within soft drinks<sup>3</sup>," he says.

AG Barr is also disrupting Scotland's fast-growing big can energy market with Pwr-Bru, hailed by Kemp as "the biggest launch of the year for the energy market". Backed by a £3m investment, the Pwr-Bru range consists of the original Irn-Bru flavour ('Origin' Original) and three knockout flavours with equally distinctive names – 'Diablo' Cherry, 'Maverick' Berry and 'Dropkick' Tropical. "A massive 98% of big can energy drinkers said they would buy Pwr-Bru and more than 85% said they would repeat-purchase all flavours<sup>4</sup>," reveals Kemp.

"Energy drinks consumers look for excitement, innovation and tasty flavours to keep them engaged. Our energy offer delivers just that."



Source

<sup>1</sup> IRI, Total Market Value Sales MAT to 26.08.23  
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<sup>4</sup> JVA Quantitative Research, March 2023





# Win

## THE ULTIMATE SNOWSPORTS EXPERIENCE



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 UK, 18+ ONLY. 00:01 01/10/23 - 23:59 30/11/23. PURCHASE A PARTICIPATING PRODUCT & SCAN THE QR CODE DIRECTING YOU TO THE MICROSITE. COMPLETE THE FORM TO PROVIDE YOUR DETAILS INCL. THE ON-PACK BARCODE TO ENTER PRIZE DRAW. PURCHASE REQUIRED. PRIZE: 1 X SKI OR SNOWBOARD LESSON IN MANCHESTER WITH A GB SNOWSPORT ATHLETE FOR THE WINNER & 1 GUEST, INCL. £150 TRAVEL CONTRIBUTION, LUNCH & 1 NIGHT ACCOMMODATION WITH BREAKFAST & DINNER. PRIZE INCLUDES A 7-DAY SKIING OR SNOWBOARDING TRIP TO ZINAL, SWITZERLAND FOR THE WINNER & 1 GUEST, INCL. £1,000 SPENDING MONEY, FLIGHTS & ACCOMMODATION (MUST BE BOOKED BY 15.01.24 AND TAKEN BY 13.04.24). GUEST MUST BE 18+. RETAIN RECEIPT TO CLAIM. MOBILE & INTERNET ACCESS REQUIRED. MAX 1 ENTRY PER HOUSEHOLD PER DAY. VISIT [WWW.WINWITHRUBICONRAW.CO.UK](http://WWW.WINWITHRUBICONRAW.CO.UK) FOR FULL T&CS & PRIZE DETAILS. PROMOTER: A.G.BARR P.L.C. WESTFIELD HOUSE, 4 MOLLINS ROAD, CUMBERNAULD, G68 9HD.

## AQUA Carpatica

# Perfectly flavoured hydration

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### KEY BRANDS

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

On a mission to provide consumers with the healthiest hydration options, Aqua Carpatica has extended its range of premium natural mineral water with Aqua Carpatica Sparkling Flavours, marking the entry of the brand into the flavoured category.

“Our carefully curated range of Aqua Carpatica Sparkling Flavours is the result of meticulous research combined with the purity and minerality of our natural mineral water and a delightful blend of natural flavours,” says the company.

“Aqua Carpatica Sparkling Flavours are powered by natural mineral water, natural flavours and no added sugar, sweetened with agave syrup, and packaged in 330ml cans for convenience. Choose from the invigorating blend of Lime & Mint, the tantalising fusion of Peach & Mango, the delightful pairing of Strawberry & Elderflower, and the irresistible allure of Raspberry – each sip is a burst of pure pleasure and the perfect fusion of healthy hydration and irresistible taste.”

### Tracking the customer journey

The launch is being supported by a multiple touchpoint and multichannel campaign, following the customer journey from awareness to purchase. In recognition of the fact that this is rarely linear, Aqua Carpatica will implement diverse strategies to capture shopper attention at various touchpoints, but always ensuring it remains customer-centric – from offline campaigns such as print, through online (social media activation) through to in-store merchandising.



“Aqua Carpatica Sparkling Flavours are powered by natural mineral water, natural flavours and no added sugar, sweetened with agave syrup”

“Our campaigns also highlight the journey from our protected natural springs to the consumer’s hand, evoking a sense of purity and authenticity that resonates with health-conscious consumers,” it says.

### Natural – from start to finish

Aqua Carpatica’s core product is its award-winning natural mineral water, with this being the starting point for all derived items. So, all of its products have the benefit of natural minerals, are virtually nitrate-free, low in sodium and rich in electrolytes.

“We pride ourselves on using natural ingredients and avoiding added sugar and artificial sweeteners – our subtle sweetness is derived from agave syrup,” notes the company. “Aqua Carpatica Sparkling Flavours aligns with contemporary consumers’ desire for natural, healthy indulgences and, simultaneously, impresses them with flavour innovation and a commitment to well-being.

“Fifteen different formats suit all consumption occasions, from on-the-go to big volumes for at home use, including still and sparkling, unflavoured and flavoured,” it adds. “We are revolutionising a well established category with a refreshing alternative to artificially flavoured and sugary beverages, and are offering hydration with flavour, functional and wellness benefits, as well as diverse demographic appeal, enabling retailers to tap into a broad customer base.”





**AQUA**  
CARPATICA

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ASCO Foods – Mogu Mogu

# Standing out from the crowd

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**Indomie**  
**Linghams**  
**Freez Mix**  
**Roi Thai Curry**  
**Oh! Ricey Pho**

➔ Mogu Mogu’s journey in 2023 has been remarkable, boasting a 371% volume growth with 36 million bottles sold in the 12 months to the end of September 2023<sup>1</sup>, reveals Ash Chadha, sales & marketing director at brand distributor for UK & I, Asco Foods. “This meteoric rise was accentuated by securing new listings with Aldi, WHSmith, B&M and EG Group,” he says. “Additionally, our strengthened alliances with Asda and Sainsbury’s allowed us not only to introduce more Mogu Mogu flavours but also to expand our brand presence across a greater number of their stores.

“Mogu Mogu isn’t just a beverage; it’s an experience,” says Chadha. “Marrying exotic fruit flavours with the chewy delight of nata de coco, we present a singular drink sensation, curating the concept of fun and curiosity. Our appeal extends from the exotic flavours and chewy delight, to the vibrant branding of the bottle, and even to the distinct mascot emoji on the cap. Every design element is eye-catching – evident as we’re among the top three best-selling drinks on TikTok<sup>2</sup>. The brand resonates via taste and with its fans across three pillars: connection, flow and playfulness.”

Mogu Mogu’s burgeoning popularity has positioned it as a forerunner in the convenience fruit drinks sub-category, ascending to 5th best-seller in convenience fruit drinks for the 12 months to March 2023<sup>3</sup>. To appreciate this meteoric rise, one needs to note that the brand, positioned in 28th place a year previous, saw a massive 1,581% growth in its moving annual total.

“Mogu Mogu’s phenomenal ascent



“Mogu Mogu isn’t just a beverage, it’s an experience, marrying exotic fruit flavours with the chewy delight of nata de coco and curating the concept of fun and curiosity”

this year has been truly remarkable, with it performing as the best-selling drink in its category for several retailers,” notes Chadha. “Our unwavering commitment to innovative marketing and the introduction of two exciting, and closely guarded, new flavours this November reinforces our trajectory for sustained growth.”

This past year has seen Mogu Mogu use a dynamic multi-channel marketing strategy, adds James Ku, marketing manager for Asco Foods. “Gen Zs and Millennials, a significant portion of our core audience, have been instrumental in fuelling our brand’s momentum. Recognising this, we tailored our marketing predominantly via social media, achieving a staggering 850% YoY growth on our TikTok account and 443% YoY growth on Instagram alone<sup>4</sup>.

“Our tactics span from curating viral reels, leveraging paid media, to hands-on sampling activities at major festivals such as Wireless, Notting Hill Carnival, and Insomnia Gaming Festival. These efforts have fortified our position in the fiercely competitive drinks market and paved the way for direct sales while garnering millions of impressions across a wide audience.”



Source

<sup>1</sup> Internal company data  
<sup>2</sup> Internal data from TikTok UK  
<sup>3</sup> NIQ Data, Total Impulse, 52 w/e 11.03.23  
<sup>4</sup> IG 7,26 followers (11.10.23 vs 1,331 (19.08.22) & Tik Tok 37,149 followers (09.10.23) vs 3,417 (19.08.22)

# A NEW TASTE SENSATION



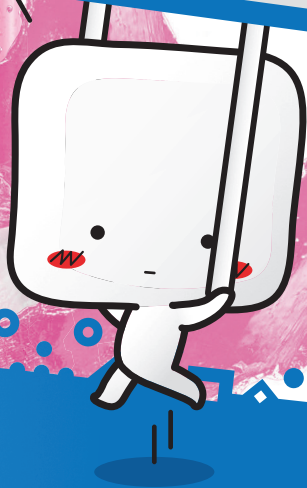
**36M**  
BOTTLES SOLD LAST 12 MONTHS

**371%**  
GROWTH YEAR-ON-YEAR  
Oct '22 to Sep '23

**370M**  
VIEWS ON TIKTOK  
#MOGUMOGU



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Available At:



Belvoir Farm Drinks

# Wildly better-tasting drinks

DETAILS

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Managing Director  
**Daniel Wheeler**  
Director of Marketing

KEY BRANDS

Belvoir Farm

 NPД is a key focus for Belvoir Farm and, this year, the company has introduced a raft of new flavours and formats aimed at elevating the everyday and to appeal to consumers looking for natural ingredients and unique taste experiences, it says. Across the year, the company has launched limited-edition bottles for Mother’s Day and the Coronation, and a Wimbledon-inspired, fruity Summer Spritz.

Designed to meet surging demand for sophisticated adult soft drinks and alcohol alternatives, it has added Rhubarb & Ginger G&T to its 750ml non-alcoholic cocktails and, following the introduction of a £1.7m canning line at its Bottesford plant earlier this year, its Passionfruit Martini, Lime & Yuzu Mojito and Peach Bellini are now also offered in 250ml single-serve cans. “Previously only available in 750ml glass bottles, the smaller format taps into demand for canned cocktails and is designed to appeal to smaller households and younger consumers,” it says.

“We are launching range of exquisite, low sugar, low calorie Botanical Mixers in 150ml can for consumers who wish to have something a little special in the evening, plus we are also launching a range of reduced-sugar Delicious & Light soft drinks inspired by our core favourites, Elderflower Lemonade, Raspberry Lemonade and Mango & Peach, for consumers who want on the go hydration and are actively looking to reduce their sugar intake without comprising on taste. They will be available in 330ml cans, singles and multipacks of four.”

Belvoir Farm invests heavily in



**“We combine innovation with integrity to bring delicious premium soft drinks and natural goodness to customers, while nurturing the land”**

marketing and advertising. “In July we re-ran our masterbrand TV ad, showing how we invest in the land and local community to make drinks that taste wildly better,” it notes. “The flagship ad is the first incarnation of our new brand platform – Welcome to our Wild – and will support our growth over the next three to five years.

“Sustainability is embedded in the heart of everything we’ve done over the last 40 years. Just this month, we rolled out our ‘made with sunshine’ tagline for our Freshly Squeezed Lemonade. On sunny days, we can pack the drink using almost all renewable solar energy, so we now aim to only make this when the sun is shining in the spring and summer.

“Belvoir Farm aims to bring exciting and delicious innovation to premium soft drinks while maintaining our standards and integrity to bring natural goodness to customers, while at the same time giving back to nature by nurturing the land. Expertly crafted, our drinks contain no colours, preservatives, flavourings, artificial sweeteners, or any other fake stuff, just masses of real pressed fruits, freshly picked flowers and cooked spices for a deliciously real taste.”

In a challenging year, Belvoir Farm has also continued to invest in consumer shows to drive awareness and connect with UK customers.



# Belvoir Farm

INTRODUCING OUR NEW

## Wildly Delicious

NON-ALCOHOLIC COCKTAIL CANS



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**REAL FRUIT. NOTHING ARTIFICIAL**

Made on the family farm in Leicestershire

### Our Sustainability Credentials

#### Zero Waste

We are a zero waste to landfill company.

#### Our Packaging

Our bottles and cans are 100% recyclable.

#### Powered by sunshine

Our solar panels help to power our factory

Britvic Soft Drinks

# Refreshing flavour innovation

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 Retail Commercial  
 Director, Britvic

KEY BRANDS

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

“Britvic’s innovation pipeline this year has been focused on new flavours across the energy and carbonates segments,” reports Ben Parker, retail commercial director at the company. “Following the continued success of the brand’s range of flavours, Pepsi Max, has expanded its range this summer with the launch of Pepsi Max Mango to help retailers continue to attract new consumers to the soft drinks category, in addition to keeping existing buyers engaged.”

“In line with the consumer trend of healthier choices which don’t compromise on taste, we expanded our Rockstar Energy range with the launch of two refreshing, zero-sugar flavours: Rockstar Refresh Strawberry & Lime and Watermelon & Kiwi to tap into the growing consumer demand for lower-sugar options,” he reveals. “Both products are high in vitamin C<sup>1</sup>, contain zero sugar and are only 21 calories per can, offering consumers more choice.”

**Embracing mocktails**

Britvic also entered the ready-to-drink (RTD) mocktails space with its UK No.1 adult soft drink<sup>2</sup>, J20. “This offers an RTD mocktails range which taps into the growing non-alcoholic market in the UK, projected to reach a valuation of £432m by 2027<sup>3</sup>,” explains Parker. “The three premium flavours – Strawberry & Orange Blossom Mojito, White Peach & Mango Daiquiri, and



“Our new J20 RTD mocktails range taps into the growing non-alcoholic market in the UK, projected to reach a valuation of £432m by 2027<sup>3</sup>”

Blackberry & Blueberry Martini – launched in September 2023. These products are designed for consumers seeking more elevated experiences and interesting flavours that match up to the mocktail experience they get out-of-home, but for a fraction of the cost at home.”

**Dangerously Potent Tango**

It’s key to underpin new product development with marketing and advertising campaigns, as this ensures brands are front of mind for consumers when in-store, which will in turn help retailers drive sales, he adds. “Earlier this year, we launched our £2m Tango Dangerously Potent campaign, which focused on our core Tango flavour, Dark Berry. This not only drove engagement among shoppers but echoed the brand’s bold and mischievous personality with its famous strapline ‘Get Tango’d’.

“Our continued innovation, in line with latest consumer trends and our ongoing brand support plans, makes our range of well-known and trusted soft drinks household staples. Each brand caters for consumers in different ways, whether that be a range of formats for specific occasions, or a range of flavours for specific tastes. These factors are key to any retailer’s soft drinks range, beacon brands are key to standing out to shoppers in what can be a crowded category.”



Source

<sup>1</sup> 80mg (100% RI) Vitamin C per can  
<sup>2</sup> NielsenIQ RMS, Grocery Multiples & Convenience Impulse GB, Adult Soft Drinks Britvic Defined, Combined MAT Value Sales w/e 30.06.23, CGA by Nielsen IQ, Total Licensed GB, MAT Retail Sales Value, w/e 26.08.23  
<sup>3</sup> Kantar Worldpanel, Attitudes Towards Low and No-Alcohol Drinks UK, 2022





# GIVE YOUR SALES A SPANK



**FASTEST GROWING FRUIT CARBONATES BRAND\***  
**+43% VALUE GROWTH VS LAST YEAR\*\***

**GET TANGO'D**

\*NielsenIQ RMS, Total Coverage GB, Fruit Flavoured carbonates Britvic Defined. Product Range, Value Sales % Chg vs YA., MAT to 26.8.23 \*\*NielsenIQ RMS, Total Coverage GB, Fruit Flavoured carbonates Britvic Defined. Product Range, Value Sales % Chg vs YA, MAT to 23.9.23. Tango +42.7% Value Sales % growth vs YA- which is the fastest growing FFC product range in the top 21 brands which account for 96% of FFC category sales.



@BritvicTrade



www.atyourconvenience.com

## C4 Energy

# Elevating body and mind

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### KEY CONTACTS

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### KEY BRANDS

- C4 Smart Energy**
- Watermelon Burst
  - Mango
  - Red Berry Yuzu
- C4 Performance Energy**
- Cosmic Rainbow
  - Frozen Bombsicle
  - Orange Slice
  - Twisted Limeade
  - Reorg Pineapple

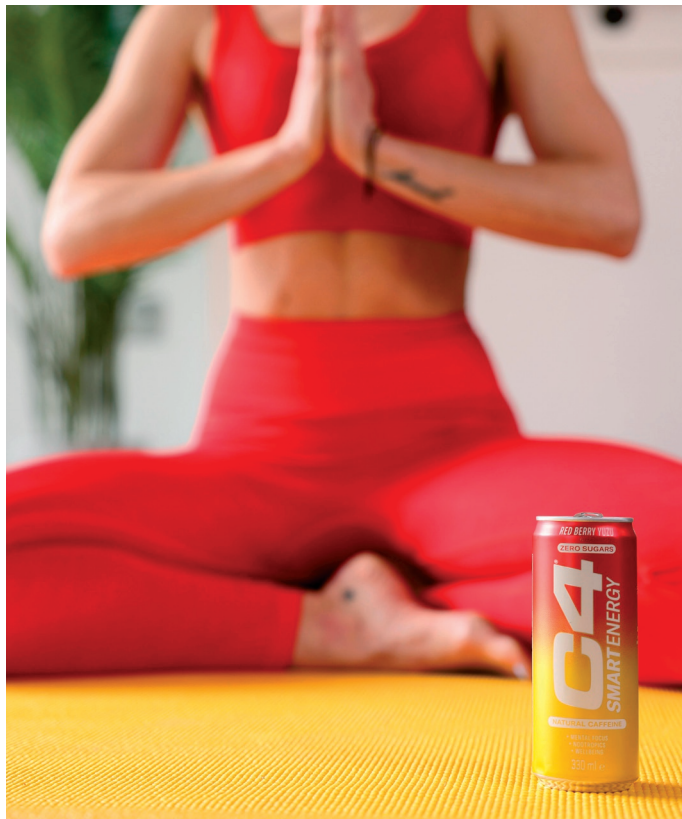
As C4 Energy continues to solidify its status as the fastest-growing energy drink brand in the US<sup>1</sup>, the company recently expanded its product range with the launch of Smart Energy – an innovative on-the-go beverage designed to elevate cognitive performance, it reveals.

“After a recent study unveiled that 68% of consumers<sup>2</sup> desire an energy option that both delivers a boost in vitality and mental performance benefits, it became evident that there was a gap in the market for products that can meet these evolving consumer expectations,” says the company.

Formulated with Brainberry® and nootropics to help sharpen mental focus and attention, C4 Smart Energy is available in a 330ml can and 20-serve pouch containing individual sachets that can be directly poured into a bottle of water and perfect for on-the-go. It is available in three flavours – Mango, Red Berry Yuzu and Watermelon Burst – at an RRP of £1.49 for 330ml can and £24.99 for 20 serve pouch.

With zero sugars, no artificial colours, no carbohydrates and low in calories, C4 Smart Energy also contains natural caffeine sourced from green coffee bean extract, providing 106mg caffeine without the addition of sugars.

In 2023, C4 Energy has leveraged a full marketing mix to drive consumer engagement and expand its market presence. “We launched our first out-of-home media campaign in Q1 of this year, capturing the attention of 13m diverse consumers and creating a strong brand recall,” says the company. “Building on this momentum, our ongoing sampling program has put the can in the hands



**“We are committed to delivering delicious and refreshing energy drinks, but also helping our consumers achieve their aspiration”**

of 230k consumers in H1. Integrated partnerships with social media influencers, such as fashion model Jordan Rand and music DJ Joel Corry, have helped to introduce the brand to a whole new set of consumers through innovative content and activations.

“The numbers speak volumes; in H1, we’ve reached an impressive 59m consumers across all media platforms, with 13.2m actively participating in interactions on our social media.”

C4 Energy believes consumers are now more motivated than ever to improve all aspects of their lives, including what they put into their bodies. “We are committed to delivering delicious and refreshing energy drinks, but also helping our consumers achieve their aspiration,” it says. “The launch of C4 Smart Energy provides consumers with a viable solution that the market previously didn’t offer. Containing natural caffeine, zero sugars and mental focus ingredients, this truly unique product helps consumers achieve their health and wellbeing goals.”



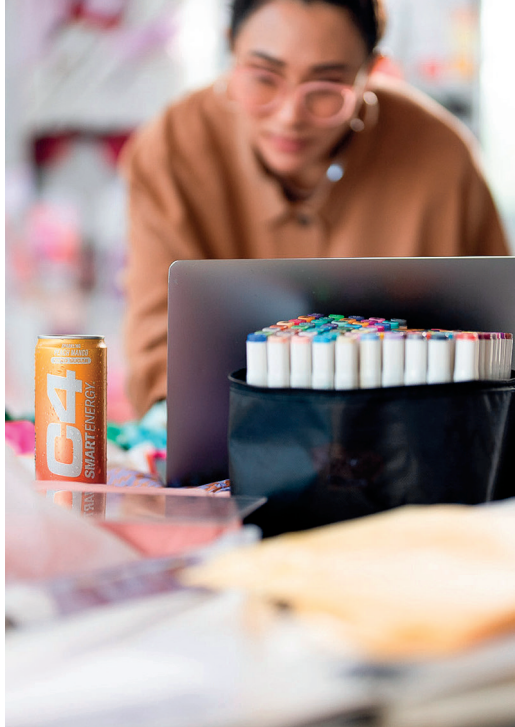
### Source

<sup>1</sup> IRI, POS data, 13 w/e 23.04.23

<sup>2</sup> Kelton Brand Tracker Database, Energy Drink TAM, n=1,006

# ENERGY FOR EVERY MOMENT

@C4ENERGY\_EUR



C4 SMART ENERGY  
**STAY  
FOCUSED**

Cano Water

# Why Cano Water is here to stay

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KEY BRANDS

Cano Water

↙ Cano Water is the leading canned water company<sup>1</sup>. “As purpose-driven innovators, we have disrupted the water market by providing a sustainable, on-the-go alternative to single-use plastic bottles,” says Josh White, co-founder & global brand director. “Cano Water was born after a visit to Thailand with my two mates, where we witnessed the plastic problem first-hand. We wanted to create a solution and found that aluminium was the most recycled and recyclable drinks packaging. Our vision is to remove 1bn plastic bottles from the ocean by 2030.

**Cano 2.0**

“When we started Cano Water, our vision was to inspire other companies to follow suit,” he says. “In recent years, the canned water market has grown. So where, before, we were building the overall category, our strategy today focuses on making more noise about Cano. As well as a sustainable product, we also want people to recognise Cano Water as a lifestyle brand that looks and feels desirable.”

This year the brand saw its biggest development so far, with a new era of Cano Water – Cano 2.0. “This involved the creation of a new can, with a fresh logo and wave elements, to enhance the iconic black and white cans,” he says. “The company’s product development also involved moving from shrink-wrap to cardboard boxes with the goal of reducing its carbon footprint and avoiding plastic wherever possible. We are a transparent brand and are always looking for opportunities to become even more sustainable.



“As well as a sustainable product, we also want people to recognise Cano Water as a lifestyle brand that looks and feels desirable”

“A standout moment for me of Cano 2.0, was receiving investment from huge celebrities, notably Ricky Gervais. This backing shows that highly influential people believe in our founder dream and gives us a bigger platform to further disrupt the water market; we are looking to bring Cano Water to the US at the end of this year.

“At Cano Water, we are progressive risk-takers and believe in cans not can’ts,” adds White. “This is encapsulated by our ‘Don’t bottle it!’ slogan. Not only is this written on our cans, but this energy is prevalent across our brand identity. We drive awareness by doing things differently to other water brands; we create noise and tap into culture, such as fashion and music – that’s how we stand out in such a crowded market.

**Must-have brand**

“By buying into Cano Water retailers are making a sustainable purchasing choice that supports their customers’ health and the planet’s,” he notes. “They are also buying into an effortlessly stylish, lifestyle brand. Hydration really has never looked or felt so good.”



Source  
<sup>1</sup> Zenith UK Water Report, Plain Water 2023, By Volume

# Don't Bottle It!



Cans recycle  
forever



Never sold a  
plastic bottle

**Cano**<sup>®</sup>  
Water

Coca-Cola Europacific Partners

# Creating category excitement

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KEY CONTACTS

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 VP Commercial  
 Development at CCEP

KEY BRANDS

Coca-Cola Original Taste  
 Coca-Cola Zero Sugar  
 Diet Coke  
 Fanta  
 Fanta Zero  
 Dr Pepper  
 Dr Pepper Zeroo  
 Sprite  
 Sprite Zero  
 Schweppes  
 Powerade  
 Costa Coffee RTD  
 Oasis  
 Capri-Sun  
 Glaceau Smartwater  
 Monster Energy  
 Relentless  
 Reign Total Body Fuel

Worth over £12bn in retail<sup>1</sup>, the soft drinks category remains resilient and continues to grow in value. Coca-Cola Europacific Partners (CCEP) has added more value to the category than any other soft drinks company over the past year<sup>2</sup>, and its portfolio is growing in both volume and value<sup>3</sup>, it says. Coca-Cola remains the No.1 soft drinks brand in retail<sup>4</sup>, led by Coca-Cola Zero Sugar<sup>5</sup>; Fanta and Dr Pepper are the No.1<sup>6</sup> and No.2 flavoured carbonates<sup>7</sup>; and Schweppes is the No.1 mixer brand<sup>8</sup>, it reveals.

**Engaging shoppers via innovation**

“While core favourites are key to the category’s success, innovation and new flavours are bringing excitement and new shoppers into the soft drinks aisle,” notes the company. “That’s why CCEP continues to unveil exciting new products like its range from its Coca-Cola Creations platform, including the most recent launch, Coca-Cola 3000 Zero Sugar. In fact, one in five shoppers that bought Coke Creations last year were new to the Coca-Cola Zero Sugar brand<sup>9</sup>, and there was a sustained volume sales increase for the brand in the months that followed each launch<sup>10</sup>.”

CCEP has also reformulated some of its most popular products this year – including Dr Pepper Zeroo and Sprite Zero – so that both now have a taste that’s closer to the original variants, as well as a sleek new look and feel.

And CCEP is innovating when it comes to packaging. It has expanded the roll-out of its ‘attached caps’, designed to keep all parts of the package together to make them easier to collect and recycle, across more of its bottles. It has also trialled refillable bottles in partnership with Milk & More, building on previous trials to find innovative and sustainable ways of delivering soft drinks to consumers.

“As well as engaging consumers with its flavour and packaging innovations, CCEP has been creating a buzz with high-profile media campaigns and promotions that shoppers have come to expect from its leading brands, including Diet Coke’s ‘Win What You



“CCEP continues to unveil exciting new products, including the most recent launch, Coca-Cola 3000 Zero Sugar”



Love’ campaign in collaboration with Kate Moss,” says the company. “Campaigns target key occasions and opportunities that will help retailers drive sales. Coca-Cola’s Recipe For Magic campaign with supermodel Gigi Hadid shone a light on the role Coca-Cola can play in elevating meals at home. Complementary cross-category displays in-store are also helping shoppers who are looking for meal planning inspiration<sup>11</sup>.”

**Holidays are coming...**

The run-up to Christmas is a key time of year for soft drinks. In fact, last year soft drinks generated almost £900m of sales in the last four weeks of the year, up 9.8% vs 2021<sup>12</sup>, notes CCEP.

“People are being more careful with their spending, with half of shoppers saying they will cut back on the amount they spend on entertainment this Christmas<sup>13</sup>,” it says. “However, this could lead to more at-home socialising, with sharing packs of favourites like Coca-Cola and Schweppes rising in popularity.

“Coca-Cola’s iconic Christmas marketing activity will be back, which includes limited-edition festive packs, and Schweppes will be bringing more festive sparkle to households across the country with its own Christmas campaign and limited-edition pack designs.”

Source

<sup>1</sup> Total Coverage Nielsen Val MAT 17.06.23  
<sup>2</sup> Nielsen Total GB incl. dis val and vol MAT to WE 17.06.23  
<sup>3</sup> Kantar Take Home Purchasing Panel – 1yr continuous panel, over the 3 launches in 2022  
<sup>4</sup> Kantar bespoke halo effect analysis of Coca-Cola Creations, P12 2021 to P5 2023: Period = 4 weeks. Halo impact is based on volume. Looking at two periods post, four periods post and six periods post each launch  
<sup>5</sup> IGD 2021  
<sup>6</sup> Nielsen Total GB incl. dis val last four weeks of the year, up 9.8% vs 2021  
<sup>7</sup> IGD Research. 2,088 nationally representative UK shoppers, 23-24 August 2023



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\*CGA data, Total On Premise, MAT Val to 30.06.23 and Nielsen data, Total GB, MAT Val to 17.06.23  
(Coca-Cola Trademark includes Coca-Cola Original Taste, Coca-Cola Zero Sugar and Diet Coke)

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Coca-Cola Europacific Partners – Costa Coffee

# Growing RTD coffee's value

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KEY CONTACTS

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KEY BRANDS

**Costa Coffee**  
**Costa Coffee Frappé**

Costa Coffee is the nation's favourite coffee shop<sup>1</sup>, and has 97% prompted brand awareness in the UK<sup>2</sup>, which helps to explain why it's gaining share in the ready-to-drink (RTD) coffee segment faster than any other major brand<sup>3</sup>, says Coca-Cola Europacific Partners (CCEP), manufacturer and distributor of the Costa Coffee RTD range in GB.

As the RTD coffee segment continues to diversify with new flavours, functionalities and formats, new shoppers are being recruited into the segment, it says. "In fact, over the last year, 89% of Costa Coffee RTD sales were incremental to the segment<sup>4</sup>."

Costa Coffee's alliance with CCEP brings together coffee credentials and soft drinks expertise, and is focused on growing the value of RTD coffee to £600m in the coming years. There is a clear plan designed to unlock that growth, using Costa and CCEP's RTD Coffee Vision and research, it notes.

According to CCEP, there are three key RTD chilled coffee need states<sup>5</sup>, which correlate to caffeine intensity and flavour, and Costa's range caters to each of them. "The Costa Coffee RTD Double Shot Flat White offers shoppers a high-intensity boost; the medium-intensity Latte range is an ideal everyday pick-me-up; and the Frappé range caters to those seeking a more indulgent low-intensity treat drink.

"Each product's characteristics are communicated clearly on-pack to help shoppers identify the best product to suit their needs."

Through this innovation, Costa Coffee has become the fastest-growing major brand in RTD coffee<sup>6</sup>, +55% in value and +45% in volume<sup>7</sup>, adds CCEP.



“This autumn saw the launch of the brand's first plant-based variant – Costa Coffee Oat Latte RTD, tapping into the rapid growth of plant-based RTD coffee in grocery and the standout performance of oat milk drinks in Costa Coffee shops”

This autumn saw the launch of the brand's first plant-based variant – Costa Coffee Oat Latte RTD – tapping into the rapid growth of plant-based RTD coffee in grocery<sup>8</sup>, and the standout performance of oat milk drinks in Costa Coffee shops<sup>9</sup>. Costa Coffee Oat Latte RTD is available in 750ml 100% rPET bottles<sup>10</sup> and joins Costa Coffee's other multi-serve formats (+105% in value<sup>11</sup>), stocked in the main dairy aisle.

The full Costa RTD range is HFSS-compliant, so all three consumer need states can easily be catered for in the food-to-go section at the front of store, and in other high footfall locations to capitalise on the impulsive nature of six in 10 RTD coffee purchases<sup>12</sup>, it adds.

"Costa Coffee's strong marketing and promotional support – such as this year's on-pack promotion and summer-long advertising and sampling campaign – have driven awareness, interest and trial of the brand," says CCEP. "And with only a quarter of the population currently buying into RTD coffee<sup>13</sup>, recruiting more shoppers is key to unlocking its full potential.

"RTD coffee continues to grow (+15%), and Costa Coffee's range continues to out-perform it (+55%)<sup>14</sup>. With the second-highest pence per litre in soft drinks<sup>15</sup>, the segment is a real money-making opportunity for retailers, with significant headroom for more growth."

Source

- <sup>1</sup> Allegra Strategies, 2022
- <sup>2</sup> Metrixlab Brand tracking, May 2023
- <sup>3</sup> Nielsen, Total GB MAT Val to 17.06.23
- <sup>4</sup> Kantar, The Panel 11.06.23 (52wk data)
- <sup>5</sup> Proprietary Costa RTD research completed in 2020/2021
- <sup>6</sup> Nielsen, Total Cov Val MAT w/e 17.06.23
- <sup>7</sup> Nielsen, Total Cov Val & Vol MAT w/e 17.06.23
- <sup>8</sup> Nielsen, Multiple Grocers MAT 28.02.22
- <sup>9</sup> Costa Coffee Shop internal sales FY 2022
- <sup>10</sup> Excluding caps & labels
- <sup>11</sup> Nielsen, Total Cov Val MAT w/e 17.06.23
- <sup>12</sup> Brand Potential Shopper Research X Costa, April 2023 Sample: 986 RTD coffee shoppers
- <sup>13</sup> Kantar, Combined Panel FY2022
- <sup>14</sup> Nielsen, Total Cov MAT Val w/e 17.06.23
- <sup>15</sup> RTD Coffee is 2nd behind Kombucha in terms of PPL, Nielsen, full year 2022 data to w/e 31.12.22.





**NEW**  
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**Fastest Growing**

major Ready-To-Drink Chilled Coffee brand\*

**Nation's favourite**

coffee shop brand for 13 years\*\*

Costa Coffee RTD is up

**55%**

and growing 3 x faster than the RTD segment\*

**Full Range**

HFSS compliant

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## Coca-Cola Europacific Partners – Monster Energy Co.

# Supercharging energy sales

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## KEY CONTACTS

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Development at CCEP

## KEY BRANDS

**Monster Energy**  
**Relentless**  
**Reign Total Body Fuel**

➔ Monster has supercharged sales in the energy drinks sector in recent years, moving from challenger brand status in GB to become a major driving force of growth within energy, says distributor Coca-Cola Europacific Partners (CCEP).

“Adding an extra £92m<sup>1</sup> in sales in the past year has taken the value of the Monster brand to more than £546m<sup>2</sup> against a backdrop of 20% volume growth<sup>3</sup>,” reveals the company. “Monster’s momentum has helped grow the value of total energy drinks to reach a massive £1.8bn<sup>4</sup> in GB.”

Energy drinks have come a long way since they first hit the market back in the '90s and Monster has played a big part in this evolution, delivering innovation in flavours, juice blends and functional benefits to help make energy drinks more mainstream, notes Yeoman.

The core Monster range is led by the iconic Original variant, worth £143m<sup>5</sup> in retail, it says. “In a huge step for the brand and the category, a new variant of this fan favourite hit shelves in September: Monster Zero Sugar offers the same full-flavoured taste of Monster Original but with zero sugar,” it adds.

Monster Zero Sugar follows four other launches in 2023: Monster Lewis Hamilton Zero Sugar, Monster Juiced Aussie Lemonade from the Monster Juiced platform, red berry-flavoured Monster Ultra Rosa and Monster Ultra Peachy Keen from GB’s No.1 zero sugar energy brand<sup>6</sup>. “In fact, more than 55% of category innovation sales over the last year has come from Monster’s great-tasting NPD<sup>7</sup>,” reveals CCEP.

Monster has also become relevant to more people on more occasions, it adds. Value sales of Monster’s single cans continue to grow (+20%) as consumers enjoy them on-the-go, as part of a meal or while exercising<sup>8</sup>. And the same is true for its multipacks for at-home occasions like gaming or relaxing, which have added over £17.5m in value over the last year and are growing faster than multipacks from any other brand in the category (23%)<sup>9</sup>. “The Monster lifestyle is aligned with gaming and high-octane sports but also many more everyday occasions,” says CCEP. “Most



“In a huge step for the brand, Monster Zero Sugar hit shelves in September”



recently, the brand saw the return of its on-pack promotion in partnership with Call of Duty®, offering brand fans the chance to scan unique QR codes on promotional packs to earn 10 minutes’ worth of double experience points (XP – gaming currency).

“It’s important not to forget the other brands in the company’s portfolio,” adds the company. “Relentless continues to align with the music scene and has expanded its zero-sugar offering with a Watermelon variant, helping the brand gain volume and value over the last year<sup>10</sup>. Reign Total Body Fuel remains the No. 1 brand in performance energy<sup>11</sup>, and continues to appeal to fitness enthusiasts with a range that now includes Reign Mang-o-matic.”

2023 has been yet another epic year for the Monster Energy Co and distributor CCEP, with more innovations and high-octane marketing activity to come in 2024.

## Source

<sup>1-11</sup> Nielsen Total GB, val MAT w/e 17.06.23

# WATCH YOUR SALES TAKE OFF WITH INNOVATION.

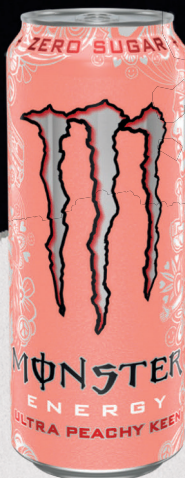
MORE THAN 55% OF CATEGORY INNOVATION SALES HAVE BEEN DRIVEN BY MONSTER. †



NEW



NEW



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Grenade

# Shake up your chiller

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Head of Product

KEY BRANDS

Grenade

↙ Grenade’s phenomenal growth through 2023 has cemented it as the UK’s No.1 protein bar brand with £45m of sales YTD, an increase of 33% on last year and double the sales of brand No.2<sup>1</sup>. “This enormous success in the protein bar market gives Grenade the experience to continue to promote the power of protein and healthier products within soft drinks too,” says managing director Phil Greenhalgh.

With 94% of adults trying to eat more healthily<sup>2</sup>, and 75% happy to swap for a healthier option if it’s tasty<sup>3</sup>, Grenade ready-to-drink protein shakes provide the perfect solution for consumers looking for a healthier alternative to their usual breakfast drinks or smoothies, he notes. Each 330ml bottle comes packed with over 24g protein, low in sugar and incredibly creamy, giving customers the ultimate guilt-free indulgent drink that supports their busy lifestyle.

**Guilt-free indulgence**

Developed following the incredible success of the Grenade protein bar range as a tasty, convenient way for consumers to get their protein on-the-go, the protein shakes are perfect alternative delivering on the brand’s fundamentals of never compromising on taste, while providing the functional benefit of high protein and low sugar, says Greenhalgh.

“Available in indulgent flavours such as Fudge Brownie, White Chocolate, Strawberries and Cream, and the latest innovation, inspired by the best-selling Grenade protein bar, Salted Caramel, there is a flavour for every customer,” he says. “Best served chilled, these rich, creamy protein shakes, which are under 211 calories per 330ml, give



Source

<sup>1</sup> IRI Total Marketplace, Protein Bars, Value sales 52 w/e 04.09.23  
<sup>2</sup> Mintel, Attitudes Towards Healthy Eating – UK, 2023  
<sup>3</sup> IRI Marketplace, Protein Shakes, Total Convenience, Value Sales, 52 w/e 09.07.23  
<sup>4</sup> IRI Marketplace, Protein Shakes, Total Convenience, Unit Sales, 52 w/e 09.07.23

“Available in indulgent flavours such as Fudge Brownie, White Chocolate Cookie, Strawberries and Cream and the latest innovation, Salted Caramel, there is a flavour for every customer”

customers unbelievable choice in the chiller when opting for a healthier alternative or looking for a suitable drink to fit their diet.”

**Growth bottled**

Customers are choosing protein shakes now more than ever with the total protein drinks category in 32% growth, however the Grenade range are driving this growth at 52%<sup>4</sup>, reveals Greenhalgh. “Bottles are flying off the shelves with unit sales up 41% vs the category at 16%<sup>5</sup>,” he says. “This growth is set to continue so long as customers can find their protein shakes where they expect them – chilled and ready-to-drink from the chiller. This prime-spot in-store is the perfect place for Grenade protein shakes and is where customers are looking for their healthier option.”

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SERVED  
CHILLED**



**READY TO  
DRINK**



**UNDER 211  
CALORIES  
PER 330ML**

## Mockingbird Raw Press

# Reinvigorating smoothies

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

### KEY BRANDS

#### Mockingbird Raw Press Smoothies

- Raw Greens
- Raw Defence
- Raw Boost
- Raw Vitalise
- Raw Glow

#### Mockingbird Raw Press Juices

- Raw Activate
- Raw Pump
- Raw Shield
- Raw Lift - **NEW!**, launching end of October

Mockingbird Raw Press launched just three years ago with a mission to bring the same high-quality ingredients and great taste of freshly made smoothies available on the high street, into a ready-to-drink format suitable for grocery, says co-founder Chris Laidlaw. "Mockingbird Raw Press identified a clear opportunity to reinvigorate the smoothie category, as it had become commoditised, with little differentiation, high levels of flavour duplication and high reliance on promotional activity to drive growth," he explains.

"Mockingbird has since reshaped the smoothie category, introducing a premium tier through its raw proposition and is proud to bring the excitement and health credentials of freshly made smoothies into a convenient to-go format, meeting the growing consumer demand for healthier alternatives."

### Crafted Raw

What really sets Mockingbird apart is its unique manufacturing process, says Laidlaw. "Mockingbird Juices & Smoothies are cold-pressed and utilise small-batch high-pressure processing, which enables the brand to better protect the nutritional integrity of its raw fruit and vegetables. Our range is dedicated to raising the functional health credentials of the category with our smoothies and juices overflowing with nourishing and delicious trend-leading ingredients, vitamins and superfoods."

Before Mockingbird launched, there were barely any vegetables available in the smoothie category whereas Mockingbird's signature Raw



**“Our range is dedicated to raising the functional health credentials of the category, with our smoothies and juices overflowing with nourishing trend-leading ingredients, vitamins and superfoods”**

Greens smoothie contains over 20% vegetables and naturally lower sugar due to its vegetable content, providing a differentiated offer to shoppers, he adds.

### Distribution success

Since launch, Mockingbird Raw Press has achieved over 15,000 points of distribution across the UK & Ireland and is listed in all major grocers. The smoothie category is seeing continued momentum with Mockingbird Raw Press the No.1 contributor to category growth<sup>1</sup>. Mockingbird Raw Press' signature smoothie Raw Greens is now the No.1 selling smoothie in Co-op, Sainsbury's, Morrisons and Waitrose<sup>2</sup>.

### Raw Range

Mockingbird Raw Press' award-winning smoothie range features five nutritionally rich smoothies (see side panel) in 750ml bottles as well as its 'on the go' 250ml format which recently entered the Waitrose and Co-op meal deals.

Last October, Mockingbird Raw Press extended its smoothie range into Functional Juices, in three core flavours, with a fourth flavour, Raw Lift, launching into Waitrose in October.

Committed to driving excitement into the category, the company has an exciting pipeline of innovation ready for launch over the next 24 months.

### Source

- <sup>1</sup> Nielsen, Total Coverage/GB, Smoothies, % Value Chg v YA, Data MAT to 09.09.23, Min.5% numeric distribution  
<sup>2</sup> Nielsen, 750ml branded smoothies, cash rate of sale, data 12 w/e 26.08.23



# THE No.1 RAW SMOOTHIE BRAND\*



\*Data source: Nielsen | Total Coverage/GB | Smoothies |  
% Value Chg v YA | Data MAT to 09.09.2023 | Min.5% numeric distribution

MOJU

# Shaking up juices & smoothies

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Marketing Director  
**Gemma Feare**  
Sales Director

KEY BRANDS

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

+RSP £2.10  
++ RSP £6.10

From the 2m weekly parkrunners to the explosive growth of lifestyle brands like Gymshark and FitBit, more of us are making a commitment to fitness, nutrition and feeling well. But as with all investment, the returns are what matter – something the juices & smoothies category has struggled with.

While traditionally benefiting from ‘natural’ and ‘wholesome’ perceptions, growing concerns around sugar per serve have shaken the category’s image and sales. With a massive 55% of consumers electing to reduce their juice and smoothie intake<sup>1</sup>, the category is in secular volume sales decline<sup>2</sup> and faces a real value perception challenge.

As prices rise and health perceptions weaken, hard-pressed shoppers are failing to see the value in a dearer branded orange juice vs a cheaper (and equally orangey) own-label OJ.

So how can juices & smoothies convince consumers that their products are worth the squeeze? “The category needs to earn back trust,” says Rich Goldsmith, CEO & co-founder of Moju. “To build category credibility, retailers should back the rise in more functional, lower-sugar options, and re-inject some much-needed excitement.”

As the UK’s fastest-growing juice and smoothies’ brand<sup>3</sup>, and the No.1 functional juice shot<sup>4</sup>, Moju is one brand that has seen great returns with its function-forward, nutrient-dense, low-sugar proposition. Led by its hero (and notoriously punchy) Ginger Shot, Moju leads the juice category on trip spend, loyalty and notably ERSV per linear cm of shelf<sup>5</sup>. “With its double-stacked 60ml SRP and RSP/L up to 6x times higher than branded OJ, it’s



“To build credibility in juices & smoothies, retailers should back the rise in more functional, lower-sugar options”

a dream for retailers short on shelf space,” says Goldsmith.

Meanwhile, Moju’s benefit-led pillars of vitality, immunity and gut health make everyday health choices easy and more convenient for shoppers, he notes.

The brand’s multi-million investment in 2023 across advertising, sampling and packaging refreshes have supercharged its awareness, penetration and sales growth of 50% YoY<sup>6</sup>. With its high-impact ‘Wake. Shake. Boom’ ATL campaign and, more recently, its sponsorship of Channel 4 Breakfast Moju is broadening category awareness and its association with breakfast.

Beyond campaigns, Moju’s recent packaging refresh and new hipflask-inspired dosing bottle are looking to disrupt the codes of mainstream juice and further establish the brand as the UK’s new morning essential, with a look that delivers on value perception too.

“It may be shot-sized, but Moju’s lifestyle-led, benefit-focused approach is giving the sector the shake-up it has sorely needed,” concludes Goldsmith.



Source  
<sup>1</sup> Mintel, 2023  
<sup>2</sup> Circana, 3yr Vol CAGR of –15.5%  
<sup>3</sup> Circana, Brands >8m MAT, 52 w/e 06.08.23  
<sup>4</sup> Circana, 52 w/e 06.08.23  
<sup>5</sup> Circana, Avg Wtd EROS, 52 w/e 06.08.23  
<sup>6</sup> Circana, Volume Sales, 52 w/e 06.08.23



# MOJU



THE UK'S  
**#1**  
FUNCTIONAL  
SHOT BRAND\*

\*Source: Circana GB & NI Total Market, Value Sales Share of Functional Shots L52 w.e. 03.09.23

## Princes

# Sweet news for squash

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## KEY BRANDS

Swizzels Squash

Earlier this year, Princes Limited identified an opportunity for a unique and versatile soft drinks range that could deliver strong value for money, great taste and satisfy the needs of the whole family. The consumer appetite for a new offering in this category was also rife, with over three-quarters (76%) of UK households regularly purchasing squash<sup>1</sup>.

From this, Princes embarked on a partnership with one of the UK's leading confectionery brands, Swizzels, to create a disruptive range of squash inspired by seven of Swizzels sweets' most iconic flavours. This included Drumstick, Love Hearts, Parma Violets, two Refreshers flavours – Lemon and Sour Apple, and two Squashies flavours – Bubblegum and Sour Cherry & Apple, reveals Jeremy Gibson, brand marketing director at Princes.

"Each of these original sweets has cultivated a loyal following over the years and, as a result, the brands have stood the test of time and continue to be stalwarts within the British confectionery category," he says. "In fact, Squashies is the UK's No.1 sugar confectionery brand<sup>2</sup> and sells 158 bags every minute, over 15m Refreshers bars are sold every year, 1.75bn Love Hearts are made every year, the Drumstick brand is growing by 23% year-on-year and a National Day has even been dedicated to Parma Violets<sup>3</sup>."

These flavours were then put into a lengthy research phase to ascertain shopper feedback ahead of the launch, and the results were overwhelmingly positive, he notes. For example, 94% of consumers said they would either 'probably' or 'definitely' buy at least one of the flavours, with the range having a particularly strong appeal among consumers between the ages of 18-45<sup>4</sup>.

"This research also helped highlight the importance of communicating key messages when launching the new offering," he says. "As a result, the range's functional benefits – such as having no added sugar, no artificial colours or flavours and containing real fruit – all appear on the front of the pack as these factors are high on consumers' priority lists. However, the



“From ideation to launch, the Swizzels range was developed and on-shelf across the trade within nine months”

squashes still pack a punch in terms of taste while also giving consumers a sense of 'fun' and 'nostalgia,' he adds. "From ideation to launch, the range was developed and on-shelf across the trade within nine months."

The range has grabbed consumer attention in several ways, including feature space at front-of-store, leaflet drops and shopper activation at the fixture, such as aisle fins and banners, notes Gibson. A multifaceted social media campaign to support the new range also included competitions and a collaboration with Swizzels sweets across Instagram and TikTok.

"Influencer content, in particular, has seen Swizzels Squash work with both micro and mid-tier influencers to create noise around the new flavours as part of a taste-test format," he adds. "This has been a great success, with an interaction rate of almost 15% and over 900 impressions already."

"The Swizzels Squash range is now worth over £2.6m and has over 1.1m buyers<sup>5</sup> – all in just eight months, giving a sign of what could be achieved in the next year."

## Source

- <sup>1</sup> Kantar 52 w/e 03.09.23
- <sup>2</sup> IRI, Sugar Confectionery, Total Market, Value Sales 52wks to 25.12.2022
- <sup>3</sup> Ex-factory sales
- <sup>4</sup> KICR Innovation Research June 22
- <sup>5</sup> Kantar 52 w/e 03.09.23

# Swizzels Squash

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Purity Soft Drinks

# Naturally refreshing growth

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 CEO

KEY BRANDS

Juice Burst  
 firefly

“At Purity Soft Drinks, we are continuing to deliver category-leading growth, following a transformational period for the business,” says CEO Sarah Baldwin. “Our portfolio of brands, including Juice Burst and firefly, has significantly outperformed the category, delivering 28% in value growth in the past financial year<sup>1</sup>. We have maintained a clear focus on producing very high-quality juice, made with natural ingredients and at a compelling price point. These priorities feed into our mission to deliver natural refreshment for everyone, in every drop.”

### Healthy performance

Juice Burst continues to go from strength to strength, now worth over £22m and with value up 28% in the past year alone<sup>2</sup>, growing three times faster than total soft drinks<sup>3</sup>, reports Baldwin. “This momentum is driven by ever-increasing distribution, with the brand widely available across the market, and a strong rate of sale. Juice Burst offers 50% better value to consumers than the No.1 ‘drink now’ fruit juice SKU<sup>4</sup>, as well as leaning into consumers’ growing demand for natural, healthier drinks.”

### Innovation

Purity Soft Drinks is continuing to develop new and exciting variants of the Juice Burst brand, she reveals. “Juice Burst Summer Fruits delivers a refreshing blend of strawberry, cherry and apple, with the high fruit juice content consumers expect from the brand. With consumer testing showing 89% purchase intent<sup>5</sup>, we knew the flavour was set to be a hit with shoppers.

“Juice Burst Peach Ice Tea contains more fruit juice than any other SKU in



“We have maintained a focus on producing very high-quality juice, made with natural ingredients and at a compelling price point”

the growing tea-flavoured juice market. As the best-selling still juice drink brand in English secondary schools<sup>7</sup>, the innovation will appeal to families and children by offering a healthier, great-tasting, permissible option that is both schools- and HFSS-compliant.

“Joining Juice Burst’s popular Orange and Apple variants – the second- and third-biggest ‘drink now’ fruit juice SKUs, respectively<sup>8</sup> – Peach Ice Tea and Summer Fruits provide consumers with one of their five-a-day, with no added sugar, artificial flavours or sweeteners.

### Adapting in adult soft drinks

“This year, a review of the firefly brand saw us launch a new visual identity, representing a significant step-change for customers as we look to further establish ourselves within the adult soft drinks market,” says Baldwin.

“Refreshingly still, with a complex yet subtle taste crafted from premium flavour blends and botanicals, firefly is available in four flavours. Since this review, firefly has grown by an impressive 30% year-on-year, three times as fast as the total ‘drink now’ category<sup>9</sup>. We are driving distribution, rate-of-sale and NPD for this unique proposition in the next year.”



Source

<sup>1</sup> IRI EXT Marketplace, Data 11.06.23  
<sup>2</sup> IRI EXT Marketplace, Value Sales Data 11.06.23  
<sup>3</sup> IRI Ext Market Place PPL 52 w/e 06.08.23  
<sup>4</sup> Blind consumer taste testing, March 2023  
<sup>5</sup> IRI EXT Marketplace, Data 16.04.23 (when compared to what is already available from UK brands within retail)  
<sup>6</sup> UK’s largest contract caterer sales out data w/e 31.12.21  
<sup>7</sup> IRI EXT Marketplace, Unit Sales Data 11.06.23  
<sup>8</sup> IRI Ext Marketplace, Value Sales 12 w/e 03.09.23

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\*Independent consumer taste testing | March 2023  
\*\*Vs FOS soft drinks | Retailer CC data | July 2023

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Refresco Drinks UK

# 2023 – a big year for Refresco

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

↙ Refresco, the bottler and distributor of Old Jamaica, has invested £1m into its 'Flavourverse' campaign, featuring a partnership with Kiss FM this summer, to launch the campaign to the UK public.

"The 'Flavourverse' is Old Jamaica's new brand proposition that amplifies boldness, individuality and flavour-full drinks, aiming to encourage curious 18- to 34-year-olds to be their biggest, baddest, best selves," reveals head of marketing Joe Major. "While the 'Flavourverse' enables us to bring to life our no-compromise flavour to UK consumers, it also means we can focus dedicated support for retailers to drive footfall and sales among an audience looking for more powerful flavours than many other brands in the category."

Refresco also relaunched Ting, the popular grapefruit carbonated soft drink, with the primary objective of establishing the brand as a genuine alternative drink for the everyday lives of younger consumers, celebrating diversity, inclusivity, and having fun, says Major. "Ting's redesign and new campaign look to speak to: 'summer seekers' who desire the tropical taste of summer year-round; Latin lovers with a strong affinity for Caribbean and Latin American culture; and social drinkers who enjoy Ting as a soft drink or mixer, especially in social settings," he notes.

"New flavour experiences are a great way for drinkers to try our brands," he adds. "As a category, energy drinks have increasingly mainstream appeal, and Refresco's energy brand, Emerge, provides the perfect solution, with a plethora of functional benefits and



“New flavour experiences are a great way for consumers to try our brands”

a competitive price of 70p. Flavour innovation is driving growth in the category so we've worked hard with our NPD team to create two new flavours within the range – Cosmic Cherry and Supernova Strawberry & Watermelon."

This year Refresco's must-have junk-free juice brand, Suso, also launched a new tasty flavour – Apple & Cherry – a popular combination among Gen Z, he reveals. "Without the addition of high levels of sugar or preservatives, the Suso range is HFSS- and school-compliant. As well as being vegan friendly, each flavour is bursting with zingy fruit and fizzy H2O – enough to count towards one of your five a day."

This year, Suso agreed a three-year partnership with Meals & More as part of its 'Stand Up Stand Out' ethos, and will help the charity in its quest to end holiday hunger for children and young adults living with poverty, in the UK.

Finally, Refresco's MacB brand, the No.1 flavoured water in Scotland<sup>1</sup>, updated its look this year with a contemporary label design. "MacB water has the same great taste, and is sugar-free, ticking all the boxes for those looking to embrace a healthier lifestyle," says Major. "Our bottle designs also moved to a clear cap for both 500ml and 1.5L sizes, with the caps tethered on the 500ml bottles to help reduce littering. The new cap increases recyclability – a key consideration in the current climate."



Source

<sup>1</sup> IRI Marketplace, Scotland Still Water, Units, MAT to 03.09.23

# 40 MILLION LITRES OF THE WORLD'S FAVOURITE DRINKS MADE EVERY SINGLE DAY BY US

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Providing own label  
drinks across  
the category

Wide range  
of brands for  
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FIND OUT MORE

Selected FMCG

# Mentos enters UK category

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 Managing Director  
 of Selected FMCG

KEY BRANDS

**Mentos**  
 – Apple Soda Kick  
 – Lemon & Mint  
 – Fruity Mix

↙ Perfetti Van Melle is expanding on the success of its Chupa Chups sparkling soda by launching the first-ever Mentos soft drinks range in Europe, now readily available for the UK consumer, reveals UK distributor Selected FMCG.

“Renowned globally for its mints and gum, Mentos has taken a refreshing leap into the soft drinks category, bringing its distinct and beloved taste profiles to the carbonated drinks segment in three flavours: Lemon and Mint, Apple Soda Kick and Fruity Mix,” it says. “These 240ml slim can drinks contain jelly bites to encapsulate the essence of the Mentos brand in its new infinitely recyclable can format.”

**Consumer appeal**

As part of its strategic launch, the Mentos beverage line aims to capitalise on the current trend of consumers seeking varied and unique taste experiences.

“The innovative blend of flavours, from the zest of berries and citrus combined with mint to the tangy twist of apple soda, is expected to appeal to a broad spectrum of consumers, and resonate with both Mentos enthusiasts and new customers alike,” notes the company.

**Boosting product visibility**

The Mentos drinks range will be supported in the UK with an above-the-line marketing campaign, including numerous partnerships and collaborations to amplify product visibility and large-scale reach with



“Renowned globally for its mints and gum, Mentos has taken a refreshing leap into the soft drinks category”

consumers across the country. This aligns with the wider Mentos multi-million pound marketing campaign, entitled ‘Yes To Fresh’.

**Exceptional brand experiences**

Marta Ballesteros, global licensing manager at Perfetti Van Melle says: “I’m thrilled with the launch of this groundbreaking drink for Mentos, which truly showcases our unwavering commitment to innovation and delivering exceptional brand experiences. I am confident that it will captivate the discerning palates of consumers across Europe, offering a delightful and unexpected taste sensation.”

The drinks are distributed in the UK market exclusively by Selected FMCG in partnership with HD Brands.

“We soft launched the range in early July to which the market has responded with excitement,” says Colin Stevenson, MD of Selected FMCG. “We have already secured national listings, with retailers including Spar and MFG backing the brand. There has been a lot of intrigue and interest from consumers and the trade alike and we are gearing up for a very big 2024 for the Mentos drinks range.”





# mentos®

## drinks with jelly bites



# YES TO FRESH

*with jelly bites,  
shake it!*

World  
Leading  
**BRAND**

**LOW**  
SUGAR

**HFSS**  
Compliant

## SHS Drinks

# Diverse range delivers

## DETAILS

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e: info@shs-sales.co.uk  
w: shloer.com  
w: bottlegreendrinks.com  
w: rocksdrinks.co.uk

## KEY CONTACTS

**Sarah Lawson**  
Head of Marketing – Softs  
**Andy Morris-Jinks**  
Sales & Marketing Director

## KEY BRANDS

bottlegreen  
Shloer  
Rocks  
Blossom Cottage

With three complementary brands, SHS Drinks offers a product portfolio with something for every retailer, says Sarah Lawson, head of marketing – softs at the company.

## Award-winning bottlegreen

Premium soft drink bottlegreen is respected for its high-quality adult cordials and sparkling pressés, she says. The brand is adding to its successful line-up with the roll-out of new Tropical Mango & Passionfruit cordial. Bringing an exotic twist to the range, the flavour is unique within cordials and reflects current trends for passionfruit-based cocktails.

Stocked exclusively in Waitrose since May 2023 and proving extremely popular, this tropical addition will become available to all retailers from January 2024, reveals Lawson. “Like all bottlegreen cordials, the new variant is enjoyable either as a drink in its own right or as a flavourful cocktail ingredient,” she says. “Spanning outdoor, radio and print executions, the brand’s impactful ‘Add a Dash of Extraordinary’ campaign continues to inspire consumers to use the range of eight cordials to create mouthwatering alcoholic and non-alcoholic serves.

“bottlegreen’s impressive five Great Taste awards in 2023 – including two 2-star accolades – demonstrates how competition judges as well as consumers continue to be impressed by the brand’s high-quality flavours.”

## Shloer Zero launches cans

Shloer, the original adult soft drink (ASD), introduced its first-ever zero-calorie products last autumn, under the sub-brand Shloer Zero. Available in White Grape and Red Grape variants in 750ml glass bottles, Zero became the only branded no-calorie proposition in the ASD category, says Lawson.

“Reflecting trends towards reducing calories or cutting out sugar, Shloer Zero is a great-tasting, zero-compromise, zero-calorie product that doesn’t compel consumers to trade-off between flavour and sugar content,” adds Lawson.

Building on Zero’s success, new 250ml slimline cans in four-packs



“Shloer Zero is a great-tasting, zero-compromise, zero-calorie product that doesn’t compel consumers to trade off between flavour and sugar content”

launch this autumn; available in White and Red Grape, they offer a versatile, on-the-go format. “The new cans are a unique proposition in ASDs and will unlock everyday usage,” notes Lawson.

Shloer is expanding its normal range with a festive limited edition, Winter Spiced Punch, which combines Red Grape with apple and a hint of spices.

## Rocks squished for flavour

Completing the portfolio is Rocks, a premium squash brand in 740ml glass bottles. Containing no artificial sweeteners and made with whole fruit and Devonshire spring water, Rocks offers a wholesome family alternative to traditional squashes, says Lawson.

New for 2023, Summer Fruits is made from strawberries, apples, cherries and blackcurrants, plus pure spring water and natural cane sugar.

Not to be outdone by bottlegreen, Rocks also secured 2-star 2023 Great Taste awards for its existing Juicy Orange and Fruity Blackcurrant variants.



Shloer

Share the  
MOMENT

bottle  
green®

ADD A DASH OF  
Extraordinary

SQUISHED WHOLE FRUIT  
Rocks  
NOTHING ARTIFICIAL

NOTHING  
ARTIFICIAL.  
REALLY.  
NOTHING!

## Starbucks Coffee Company

# Captivating impulse shoppers

### DETAILS

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Leeds LS30 1AB

### KEY CONTACTS

**Jenny Bolton**  
Commercial Marketing  
Manager, Starbucks UK  
**Adam Hacking**  
Head of Beverages, Arla

### KEY BRANDS

**Starbucks Doubleshot® Espresso**

**Starbucks Chilled Classics®**

- Caffè Latte
- Skinny Latte Lactose Free
- Caramel Macchiato
- Oat Based Vanilla Macchiato

**Starbucks Frappuccino®**

- Caramel chilled coffee
- Coffee chilled coffee

**Starbucks Multiserve®**

- Caffè Latte 750ml
- Caramel Macchiato 750ml
- Skinny Latte 750ml

### RRPs:

- Base price
- Doubleshot £1.90
- Frappuccino £2.10
- Chilled Classic £2.00
- Multiserve £3.75

### Source

<sup>1</sup> NielsenIQ RMS data, Milk category – GB Total retail market including discounters, 52 w/e 25.02.23

<sup>2</sup> Nielsen GB, Total Dairy Drinks, Premium, w/e 09.07.2023 – 180,000 litres sold w/e 09.07.23 compared to 50,000 at the same time last year

<sup>3</sup> Athena Research, Arla Foods

<sup>4</sup> Nielsen, Total Coverage, 28.01.23

<sup>5</sup> Arla, Asda Tour, 2023

<sup>6</sup> Athena Research, Arla Foods

Surprising and delighting consumers is key to cutting through a busy soft drinks market, whether that be via a host of NPD, or investing in best-in-class marketing campaigns, says Starbucks.

### Continuing to innovate

As ready-to-drink (RTD) coffee continues to go from strength to strength, innovation is more important than ever to help brands stand out among the soft drinks crowd, says the company. Valued at £280m and with a year-on-year growth of 14.6%<sup>1</sup>, the RTD coffee sub-category is a lucrative source of profit for retailers.

Despite the pressure on shopper budgets caused by the cost-of-living crisis, premium products continued to grow in popularity across the summer months<sup>2</sup>. As 80% of RTD coffee is bought on impulse<sup>3</sup>, capturing shoppers' attention with new and innovative SKUs is key to attracting shoppers to the soft drinks fixture profiting from this lucrative sector, it says.

“As a category leader with 18% market share<sup>4</sup>, Starbucks Chilled Coffee identified a key consumer habit of at-home-consumption during the pandemic, launching its Multiserve format in 2022,” adds the company. “Since the launch, Starbucks Multiserve is now selling across 3,500 distribution points, with popularity continuing to rise<sup>5</sup> in the increase of shoppers searching for value.”

In March 2023, the Multiserve family was expanded to include Starbucks Multiserve Skinny Latte, it reveals. “Featuring a chilled blend of Starbucks bold espresso and creamy lactose-free milk with no added sugar\*, the Starbucks Multiserve Skinny Latte means shoppers can enjoy the same great taste as the classic Starbucks Skinny Latte with the convenience of a larger size packaging (750ml). Joining fan favourites, Starbucks Caffè Latte and Starbucks Caramel Macchiato, Skinny Latte is the latest iconic flavour to make Starbucks chilled coffee available for more people, and with greater variety than ever before.”



“As 80% of RTD coffee is bought on impulse<sup>3</sup>, capturing shoppers' attention with new and innovative SKUs is key to attracting shoppers to the soft drinks fixture”

### The out-of-home experience

Starbucks Chilled Coffee research shows that customer engagement and sampling more than doubles purchase behaviour<sup>6</sup>. “So, investing in an out-of-home sampling and advertising activation and supporting paid-for social media activity was key for the brand to capture this growth opportunity,” it says. This campaign was part of the largest year of marketing investment to date for the brand.

During the summer, shoppers could get their hands on a range of Starbucks RTD SKUs, and lay their eyes on the giant 3D billboard showcasing the brand's range of well-loved products.

Alongside this London-based billboard and sampling event, Starbucks Chilled Coffee invested heavily in influencer-based social media promotions. Utilising both Instagram and TikTok, the activation was promoted to a selection of influencers' social media followers, encouraging over 1.6 million consumers, primarily aged 18-30, to 'Pay It Forward' and share a Starbucks Chilled Coffee with a loved one. With 80% of chilled coffee purchased on impulse<sup>7</sup>, Starbucks Chilled Coffee's summer campaign brought the brand front of mind.

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



\*Nielsen 15/07/23



Vitamin Well

# Setting a healthier agenda

DETAILS

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Head of Wholesale &  
Convenience UK&I  
**Maria Ledesma**  
Trade Marketing  
Manager UK&I

KEY BRANDS

**Vitamin Well**  
– Elevate  
– Hydrate  
– Recover  
– Reload

Welcome to the world of Vitamin Well, where health and flavour harmonise to drive sales. “At Vitamin Well, we’re committed to creating drinks that not only support consumer health but also make their taste buds happy,” says Maria Ledesma, trade marketing manager UK&I. “Our range of flavours is designed to enhance consumer well-being in a refreshing and satisfying way. Explore the unique and invigorating flavours that can elevate your product portfolio with every sip.”

● **Elevate:** Presenting a refreshing blend of pineapple and wild strawberry, Elevate is the ideal choice for retailers aiming to improve their product offerings, notes Ledesma. “This flavour’s synergy, complemented by essential vitamins and minerals, is a strategic addition to your product line-up,” she says.

● **Hydrate:** This offers a revitalising fusion of rhubarb and strawberry, a compelling choice for quenching consumers’ thirst. “The essence of proper hydration is vital for well-being, and Hydrate fulfils this need efficiently,” she notes. “Enriched with electrolytes and vitamins, this flavour caters to customers who seek a hydration solution that ensures peak performance, whether they’re on the move or relaxing leisurely in the sun.”

● **Recover:** This option stands as a soothing blend of peach and elderflower. “It’s the ultimate choice for your customers to rejuvenate their bodies post-workout or after a long



“At Vitamin Well, we’re committed to creating drinks that not only support consumer health but also make their taste buds happy”

day,” explains Ledesma. “Recover’s unique composition, enriched with vitamins C and E, along with robust antioxidants, helps combat oxidative stress and encourages muscle recovery, leaving consumers feeling refreshed and geared up for their next endeavour.”

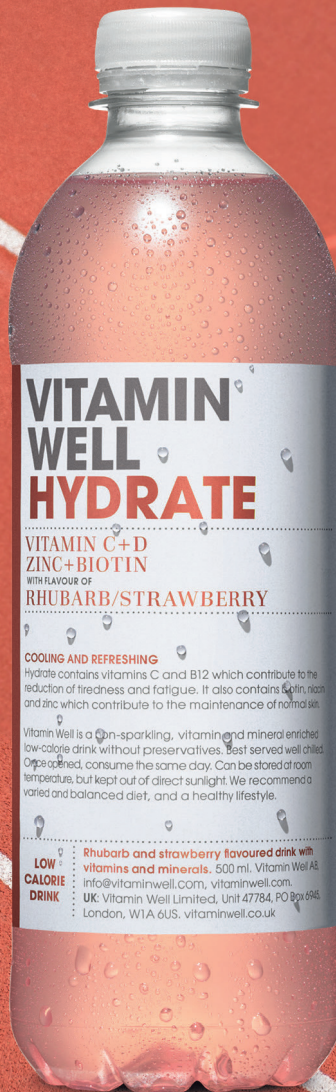
● **Reload:** Delivering a zesty infusion of lemon and lime, with a delightful taste, Reload is the natural and sustained source of energy your customers seek, says Ledesma. “With a combination of essential B vitamins, this flavour keeps energy levels high and provides a refreshing and invigorating experience for those on-the-go,” she explains.

**Winning formula for retail success**

“By featuring Vitamin Well products, retailers aren’t simply offering diverse healthy choices; they are setting the stage for a more successful retail experience,” says Ledesma. “Partner with us to elevate, hydrate, recover and reload your product portfolio with flavours that consumers trust and appreciate. We believe the winning formula for retail success combines consumer satisfaction with a focus on well-being. Our range of flavours is designed to deliver on this promise.”



# VITAMIN WELL



## VITAMIN WELL ELEVATE

VITAMIN B12 + FOLIC ACID  
MAGNESIUM + ZINC

WITH FLAVOUR OF  
PINEAPPLE/WILD STRAWBERRY

### GET TO THE TOP

Elevate contains vitamin B12, folic acid and magnesium, all of which help reduce fatigue and exhaustion. Elevate also contains zinc which contributes to the normal functioning of the immune system. In addition, magnesium contributes to normal muscle function.

Vitamin Well is a non-sparkling, vitamin and mineral enriched low-calorie drink without preservatives. Best served well chilled. Once opened, consume the same day. Can be stored at room temperature, but kept out of direct sunlight. We recommend a varied and balanced diet, and a healthy lifestyle.

**LOW CALORIE DRINK** Pineapple and wild strawberry flavoured drink with vitamins and minerals. 500 ml. Vitamin Well AB. info@vitaminwell.com, vitaminwell.com. UK: Vitamin Well Limited, Unit 47784, PO Box 6945, London, W1A 6US. vitaminwell.co.uk

## VITAMIN WELL HYDRATE

VITAMIN C+D  
ZINC+BIOTIN

WITH FLAVOUR OF  
RHUBARB/STRAWBERRY

### COOLING AND REFRESHING

Hydrate contains vitamins C and B12 which contribute to the reduction of tiredness and fatigue. It also contains folic acid and zinc which contribute to the maintenance of normal skin.

Vitamin Well is a non-sparkling, vitamin and mineral enriched low-calorie drink without preservatives. Best served well chilled. Once opened, consume the same day. Can be stored at room temperature, but kept out of direct sunlight. We recommend a varied and balanced diet, and a healthy lifestyle.

**LOW CALORIE DRINK** Rhubarb and strawberry flavoured drink with vitamins and minerals. 500 ml. Vitamin Well AB. info@vitaminwell.com, vitaminwell.com. UK: Vitamin Well Limited, Unit 47784, PO Box 6945, London, W1A 6US. vitaminwell.co.uk

## VITAMIN WELL RECOVER

VITAMIN B12 + FOLIC ACID  
MAGNESIUM

WITH FLAVOUR OF  
ELDERFLOWER/PEACH

### GET YOUR DRIVE BACK

Recover contains vitamin B12, folic acid and magnesium which all contribute to the reduction of tiredness and fatigue. Magnesium also contributes to electrolyte balance. In addition, Recover contains pantothenic acid that contributes to normal energy-yielding metabolism.

Vitamin Well is a non-sparkling, vitamin and mineral enriched low-calorie drink without preservatives. Best served well chilled. Once opened, consume the same day. Can be stored at room temperature, but kept out of direct sunlight. We recommend a varied and balanced diet, and a healthy lifestyle.

**LOW CALORIE DRINK** Elderflower and peach flavoured drink with vitamins and minerals. 500 ml. Vitamin Well AB. info@vitaminwell.com, vitaminwell.com. UK: Vitamin Well Limited, Unit 47784, PO Box 6945, London, W1A 6US. vitaminwell.co.uk

## VITAMIN WELL RELOAD

VITAMIN B+D  
MAGNESIUM+ZINC

WITH FLAVOUR OF  
LEMON AND LIME

### WHEN YOU NEED TO RELOAD

Reload contains magnesium which contributes to the electrolyte balance and vitamin B12 which contributes to normal energy-yielding metabolism. Reload also contains vitamin D which contributes to the maintenance of normal muscle function and zinc which contributes to the normal function of the immune system.

Vitamin Well is a non-sparkling, vitamin and mineral enriched low-calorie drink without preservatives. Best served well chilled. Once opened, consume the same day. Can be stored at room temperature, but kept out of direct sunlight. We recommend a varied and balanced diet, and a healthy lifestyle.

**LOW CALORIE DRINK** Lemon and lime flavoured drink with vitamins and minerals. 500 ml. Vitamin Well AB. info@vitaminwell.com, vitaminwell.com. UK: Vitamin Well Limited, Unit 47784, PO Box 6945, London, W1A 6US. vitaminwell.co.uk

# RICH IN FUNCTION. LOW IN CALORIES.

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