SOFT DRINKS REVIEW

Convenience & Impulse

BRITVIC

Welcome

Welcome to the 2017 Britvic Soft Drinks Review.

The last 12 months have passed by quickly and it's certainly been an interesting year for our category.

Following the positive feedback from last year's review, you'll see that we've followed a similar format with more channel-specific information. However, new for this year is a more visual and less copy-heavy look throughout the review, which we hope you'll agree makes it easier to navigate and brings the dynamic nature of the category to life.

As many of you will know, Britvic has been at the heart of the soft drinks industry since the 1930s when we started out as the British Vitamin Products Company, using soft drinks to bring an affordable source of vitamins to the people of Britain. Fast-forward to today and once again, the health agenda is at the heart of our industry and we at Britvic are leading the way, taking bold steps to help consumers make healthier soft drinks choices. Around 70% of our current portfolio is no or low sugar, so we are well-placed to satisfy consumers, offering them a wide and varied choice for all occasions.

Since I became GB General Manager in 2012, Britvic has focused on driving the sustainable growth of the category as well as supporting our customers to help them to unlock the further potential the category has to offer. The last year hasn't been without its challenges, particularly following the announcement of the forthcoming Soft Drinks Industry Levy, but the soft drinks category has remained one of the most vibrant FMCG sectors in the UK, with innovative companies offering new products and new brands to meet the needs of today's consumers.

We believe there are still huge opportunities for growth within the category for companies, brands, retailers and operators who innovate and invest in the long-term future of soft drinks. We hope this year's review gives some useful insight into how we as an industry can make that happen.

Paul Graham
GB General Manager

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Total Soft Drinks

THE TOTAL VALUE OF UK SOFT DRINK SALES IS ESTIMATED TO HAVE BEEN AROUND £14BN LAST YEAR

2016 was a transformational year for soft drinks. An intense spotlight shone on the industry following the announcement from the Government in March of the impending Soft Drinks Industry Levy, which of course stole most of the headlines. But it was also a year of exciting launches, memorable marketing campaigns and engaging brand activations.

The total value of UK soft drink sales is estimated to have been around £14bn last year. In such a diverse category it's perhaps not surprising that there were some differing performances at channel level, with Retail (combining the Grocery and Impulse channels) seeing value growth of +1.0%. Periods of deflation meant volume grew ahead of value at +1.5%.

The Foodservice and Leisure channel saw growth of +3.3%, due to an increasing trend for eating out and a growing consumer desire for more premium experiences. Despite these different channel performances, the underlying consumer trends that affected the category continued to accelerate.

HEALTH ON THE AGENDA

With two thirds of UK adults now said to be overweight and obesity levels rising, food and drink manufacturers are rightly recognising that they have a part to play in combating this by helping their consumers to make healthier choices. Long before the announcement of the Soft Drinks Industry Levy, manufacturers were already responding to consumers' increasing interest in health and wellness by offering them no and low sugar variants of their favourite soft drinks. However, this must be balanced with maintaining great taste and choice. Britvic has been ahead of the game in this respect, leading the way in reducing the calorie and sugar content in our drinks for many years to ensure we provide consumers with a well-balanced portfolio of great tasting drinks and a breadth of choice.

MAKING IT PERSONAL

Whilst existing trends of 'on-the-go' lifestyles and the desire for '24hr grazing' continued, there was an acceleration in the trend of consumers' rising expectations around product delivery, personalisation and experience. Shoppers became increasingly demanding and more adventurous in what they looked for and expected these personalised choices to be delivered immediately. Whilst this has undoubtedly raised expectations across the trade, it also presented an opportunity to differentiate and add value.

PREMIUM EXPERIENCES

The Foodservice & Licensed channel led the way in delivering premium experiences, something which increasingly became the norm, even in mainstream outlets. There remains a clear opportunity across all channels to capitalise on the increasing number of premium socialising occasions (both in home and out) and to accelerate this upward trajectory to deliver growth into soft drinks. This will be achieved by using premium flavours and ingredients to develop products and brands which consumers are happy to spend a little more on, as well as by taking learnings from other categories who lead the way in premium experience, such as alcohol.

DELIVERING DIFFERENTIATION

The major retailers and operators continued to strive in 2016 to establish a point of difference to drive loyalty amongst their shoppers and guests. This could be anything from offering the lowest price, the most choice or the best experience, but developing a clearly differentiated proposition was key to success and retaining customer loyalty in an increasingly competitive environment.

There will of course be a big change coming into the soft drinks category next year with the arrival of the Levy, but that shouldn't be a cause for alarm. The category is in good health and if manufacturers and trade partners collaborate effectively and evolve their offer accordingly to deliver a healthier, more experiential and more relevant category, then soft drinks will be well placed to capitalise on the obvious opportunity.

Channel Performance

SOFT DRINKS RANKED NO.3 AMONGST SHOPPERS

It was a year of continued growth for soft drinks in Convenience. When questioned about the main reason for visiting a store, soft drinks ranked No.3 amongst shoppers, just behind milk (No.1) and tobacco (No.2) and overtaking bread for the first time[1].

This meant that 2016 was the fourth consecutive year that soft drinks grew as one of the main reasons to visit a convenience store. With bigger basket sizes, greater spends and more frequent visits, retailers continued to understand and embrace the true sales potential of the soft drinks shopper.

[1]him! CTP 2016

Snapshot Facts & Figures

£37.5BN +1.2%

TOTAL VALUE OF CONVENIENCE MARKET

47,227

TOTAL NUMBER OF C-STORES, MIN. GROWTH FROM 2015

220 +5.3%

INCREASE IN THE NUMBER OF 'MULTIPLE' STORES LAST YEAR

SYMBOL GROUPS

£14.2BN +0.7%

37.9% MARKET SHARE

C-STORE MULTS

£8.4BN +3.8%

22.4% MARKET SHARE

UNAFFILIATED INDEPENDENTS

£6.3BN -1.8%

16.9% MARKET SHARE

CO-OPERATIVES

£4.5BN +4.3%

12.1% MARKET SHARE

CONVENIENCE FORECOURTS

£4BN -0.5%

10.7% MARKET SHARE

Source: IGD Retail Analysis, Convenience market Numbers 2016

Soft Drinks Category Data

TOTAL VALUE OF SOFT DRINKS IN CONVENIENCE & IMPULSE

+0.9%

£2.1 BN

SOFT DRINKS PERFORMANCE

COMPARED WITH THE CRISPS AND SNACKS CATEGORY IN CONVENIENCE & IMPULSE

SOFT DRINKS
£2.1BN +0.9%

TOTAL SNACKS[1]
-1.6% £557.2M

SUB-CHANNEL SOFT DRINKS PERFORMANCE IN C&I

INDEPENDENTS	-2.5%	£392.6M
SYMBOLS	+0.1%	£932.5M
PETROL & TRAVEL[2]	+0.9%	£338.1M
HIGH ST[2]	+2.2%	£255.5M

TOP 5 SEGMENTS IN GROWTH

RANKED BY HIGHEST 'VALUE ABS DIFF VS. YA'

PLAIN WATER	£226.1M	+£15.8M
GLUCOSE STIMULANT DRINK	£530.7M	+£3.3M
WATER PLUS	£77.7M	+£2.9M
SMOOTHIES	£19.2M	+£2.3M
FRUIT CARBONATES	£202.9M	+£1.9M

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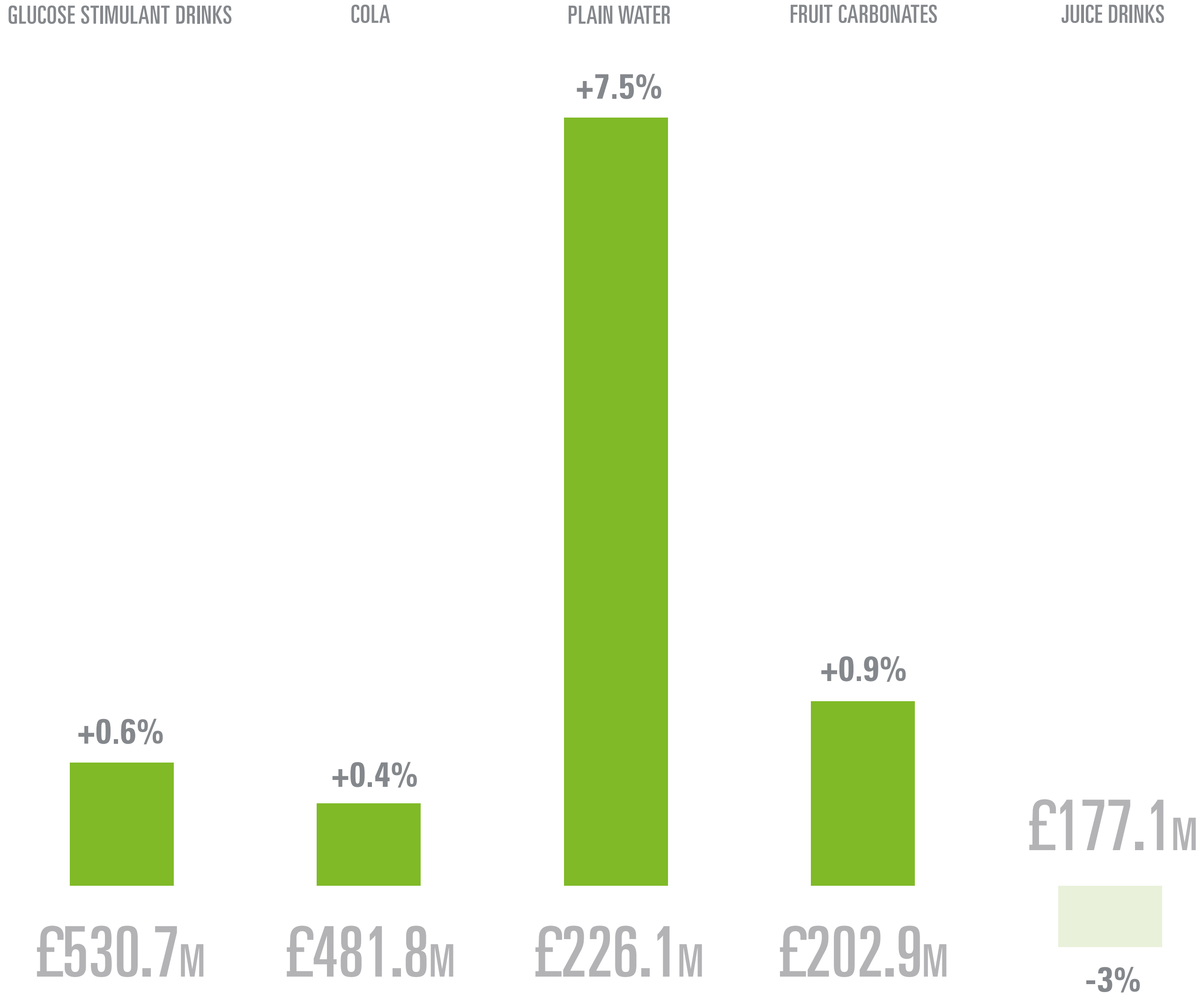
[1]Nielsen w/e 31.12.16. Unless stated, figures show Total Impulse data

[2]IRI. MAT w/e 01.01.17

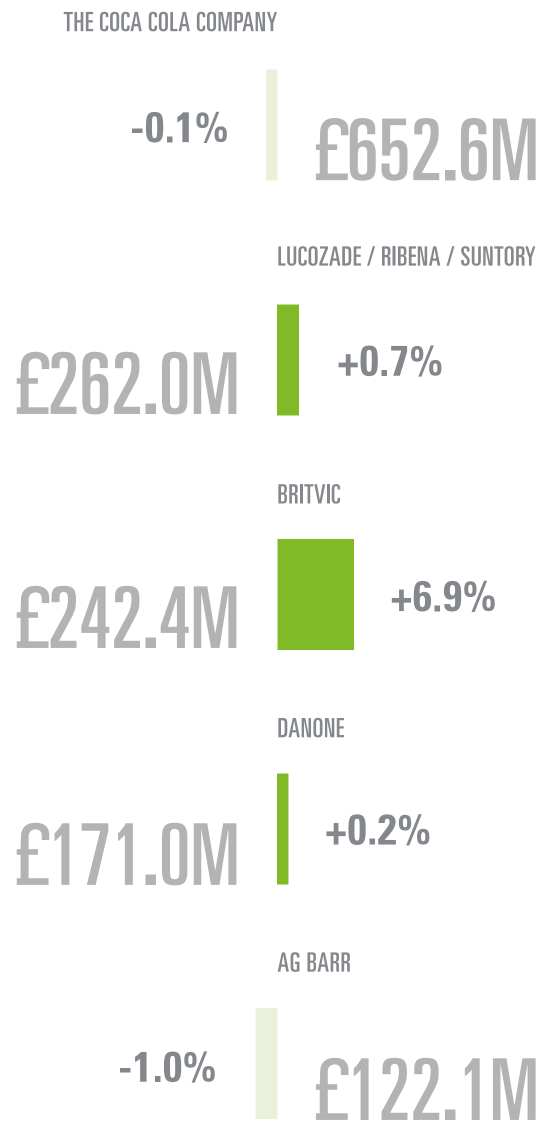
TOP 5 SEGMENTS

% GROWTH / VALUE SALES



TOP 5 DISTRIBUTORS

% GROWTH / VALUE SALES



Top 5 Brands

Ranked by Value Sales

Nielsen Scantrack Total Impulse MAT we 31.12.16

SOFT DRINKS IS THE NO.3 DRIVER FOR VISITING A CONVENIENCE STORE – OVERTAKING BREAD IN TERMS OF IMPORTANCE

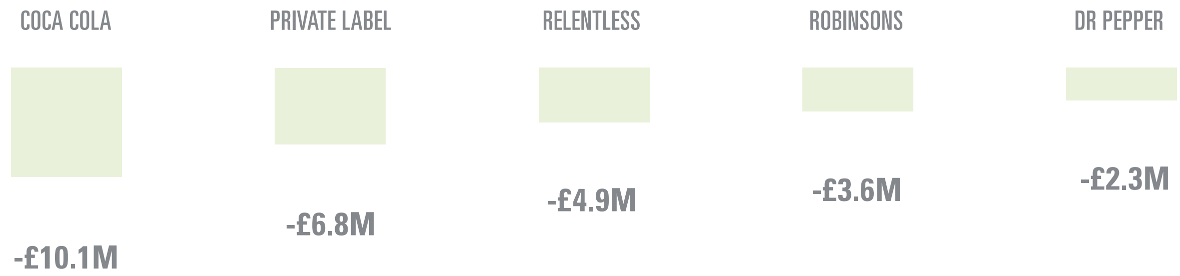
(NO. 1 MILK, NO.2 TOBACCO... NO.4 BAKERY, NO.5 NEWSPAPERS AND MAGAZINES)

TOP 5 BRANDS IN GROWTH

RANKED BY HIGHEST 'VALUE ABS DIFF VS. YA'

TOP 5 BRANDS IN DECLINE

RANKED BY LOWEST 'VALUE ABS DIFF VS. YA'



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Nielsen Scantrack Total Impulse MAT w/e 31.12.16

Soft Drinks Purchasing Behaviour

The soft drinks shoppers
spends more, visits often,

has a
bigger basket size

and
spends a longer time in store
compared to the average Convenience shopper.

2 out of 5 16-24 year olds buy a soft drink when they go in store

3.5 ITEMS IN BASKET FOR SOFT DRINKS SHOPPER

– VS –

2.7 ITEMS IN BASKET FOR AVERAGE CONVENIENCE SHOPPER

£6.22 SOFT DRINK SHOPPER

— VS —

£6.13 AVERAGE CONVENIENCE SHOPPER

5 MIN 6 S TIME SPENT INSTORE FOR SOFT DRINKS SHOPPER

— VS —

4 MIN 48 S TIME SPENT INSTORE FOR CONVENIENCE SHOPPER

What Were the Key Influences in 2016?

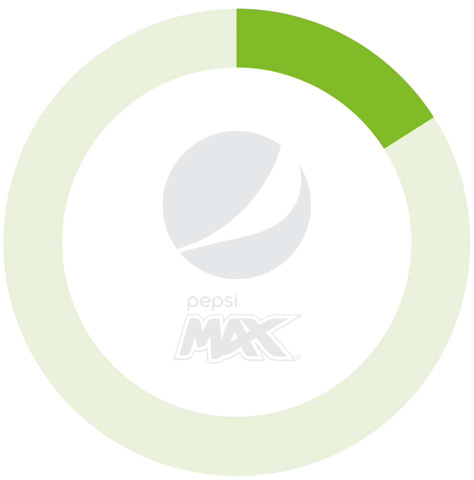
SOFT DRINKS SALES REMAINED STEADY IN 2016

Soft drinks sales remained steady in 2016, with key segments showing their potential as sales drivers, especially no added sugar, flavoured water and immediate refreshment.

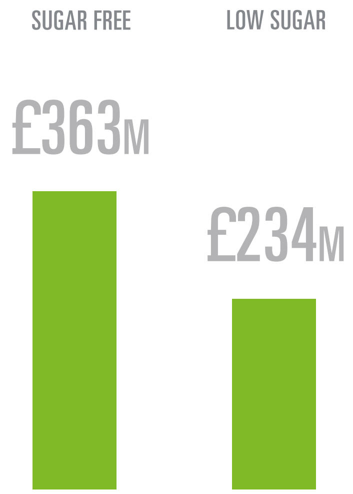
NO ADDED SUGAR SUCCESS

Health continued to be a major sales driver in 2016, with the trend reshaping the mind set of consumers to be focused on low and no sugar soft drinks. Low and no sugar drinks accounted for 11% and 18% of the Convenience channel's soft drinks sales.[3]

The continued push towards healthier soft drinks solutions from leading manufacturers drove significant sales with brands such as Pepsi MAX growing by +16.2% to £70.1m value sales.[3]



Pepsi MAX grew by 16.2% to £70.1m in Total Impulse, which is an absolute growth of £9.8m[4]



Total Impulse low sugar versus sugar free sales[5]

FLAVOURED WATER PERFORMS WELL

The health and wellness trend that gripped consumers nationwide drove up sales of flavoured waters. Water-based products that supported a healthier lifestyle were in high demand amongst consumers, as illustrated by the impressive performance for Sparkling Ice which reached a market value of £1.97m by the end of the year, despite only being launched in April 2016.[7] As more consumers made healthier purchasing decisions for both them and their families, sales of non-fruit carbonates declined for the first time in recent years.

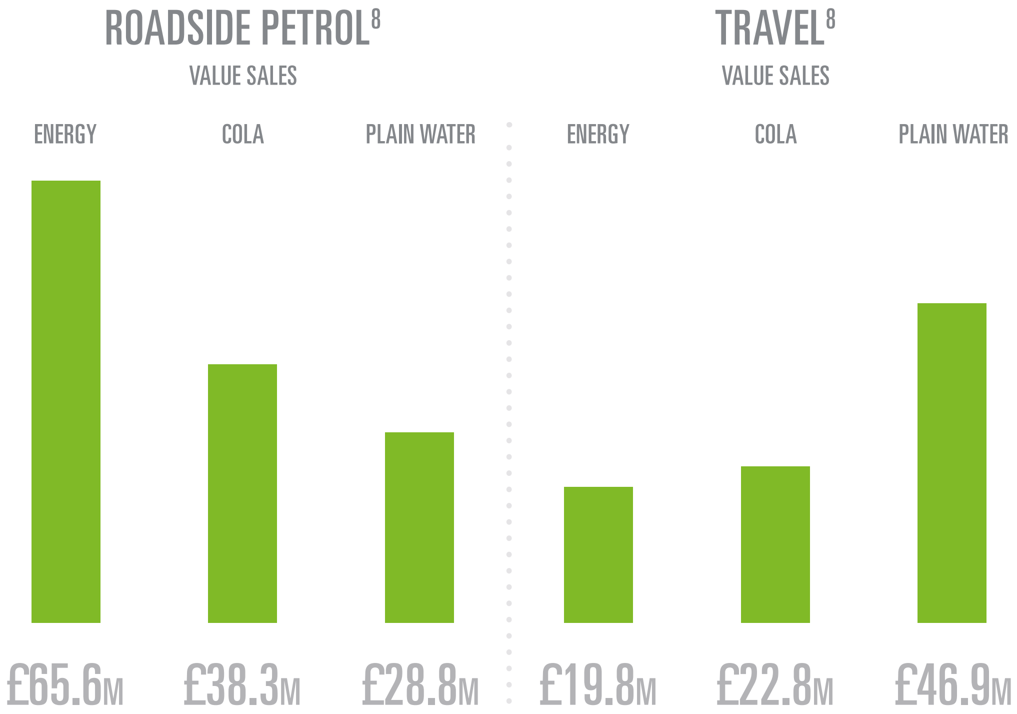
[3,4,5,6]Nielsen Scantrack Total Impulse MAT w/e 31st Dec 2016

[7]Nielsen Scantrack Total Impulse MAT w/e 31st Dec 2016

IMMEDIATE REFRESHMENT OPPORTUNITY

Space continued to be at a premium in the chiller cabinet in 2016 with retailers having to rationalise which products or brands were most deserving of shelf space in the fridge. Even in the same channel a 'one size fits all' approach to immediate refreshment wasn't possible.
For example, in forecourts, energy was the biggest soft drinks sector[8] as shoppers look for a pick me up on the road.

Whereas by comparison in travel, water was the biggest sector[8] with purchases motivated by the need for hydration. Retailers in each sub-channel had to keep this in mind in order to adapt and tailor their soft drinks range according to the tastes of their local customer base.



[8]IRI MAT data w/e 01.01.17

MAXIMISING OCCASIONS

As predicted last year, some of the key growth areas that proved most successful for retailers in 2016 were those linked to health. However, meeting the needs of shoppers by maximising occasions was an important area of focus for many.

Retailers that tapped into seasonal opportunities and events for soft drinks, especially in the warmer months, were most likely to see sales success. While immediate consumption also provided significant sales opportunities as the 'traditional' convenience store evolved further to take more advantage of on-the-go living.

We also saw continued blurring of the channels as Foodservice offerings began to merge into Convenience. Retailers responded by developing more diverse food and drink offerings to cater for more occasions and drive footfall, in order to compete.

*For all ages **except** those...*

OVER 55

FOOD TO GO WAS THE BIGGEST MISSION[9]

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[9]him! CTP 2016

Projected
Value of UK
Convenience
Market by 2021

+6.8%

Predicted growth of soft drinks volume sales in Convenience, from 2016 - 2021[11]

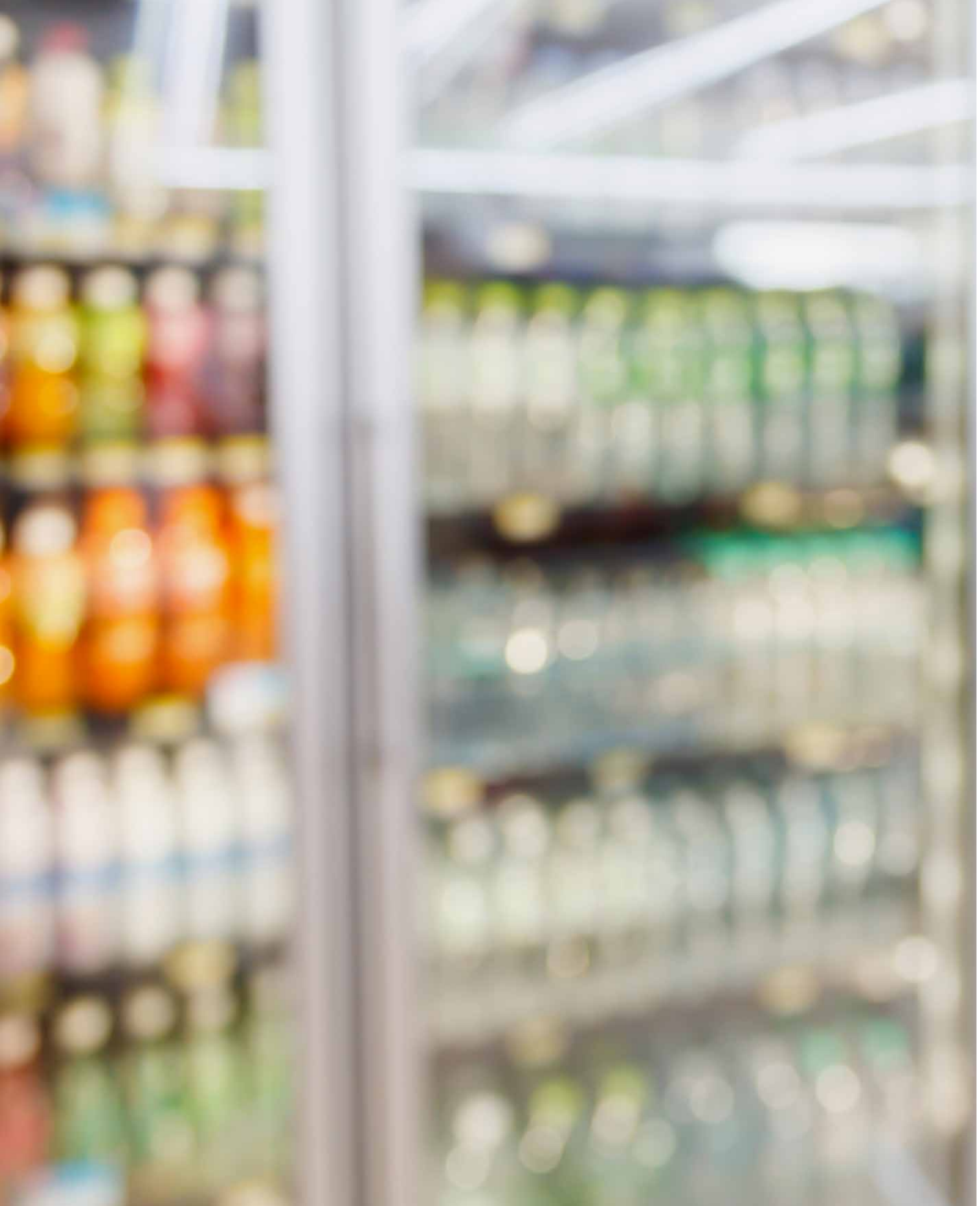
£41.9BN

+11.7%

VALUE CHANGE BETWEEN 2016-2021

REPRESENTING AN ANNUAL COMPOUND GROWTH RATE OF +2.2%

Source: IGD Retail Analysis, Convenience Market Numbers 2016. [11]Global Data 2016 (Predicted Growth from 2016-2021)



2017 & Beyond in Convenience & Impulse

Due to its complexity, Convenience can no longer be considered to be one channel as major multiple retailers continue to focus on convenience expansion and more Foodservice operators increase their presence within traditional stores. As an amazingly diverse channel, soft drinks will play a key role in unlocking and delivering growth in Convenience.

Predicted Trends for 2017 and Beyond

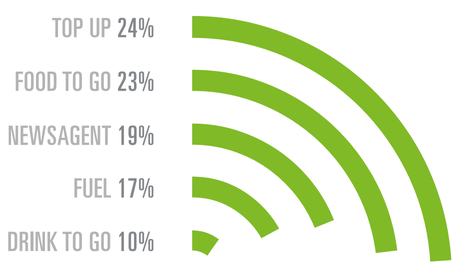
NON-STOP NOW THE NORM

With 29% now consuming immediately on purchase[10], the non-stop lifestyle is changing shopper purchasing habits. As more consumers look to satisfy their demands for wider occasions through the Convenience channel, soft drinks has an opportunity to grow share of on-the-go sales by meeting more shopper needs.

Tailoring ranges to suit the motivations of specific shopper missions will allow retailers to unlock on-the-go sales and deliver sustained growth for the category. With health expected to be high on the agenda for many in 2017 and beyond, no and low sugar versions of mainstream drinks, as well as soft drinks with added vitality or health credentials, will be key to achieving this.

SHOPPER MISSION

IN A FORECOURT[11]

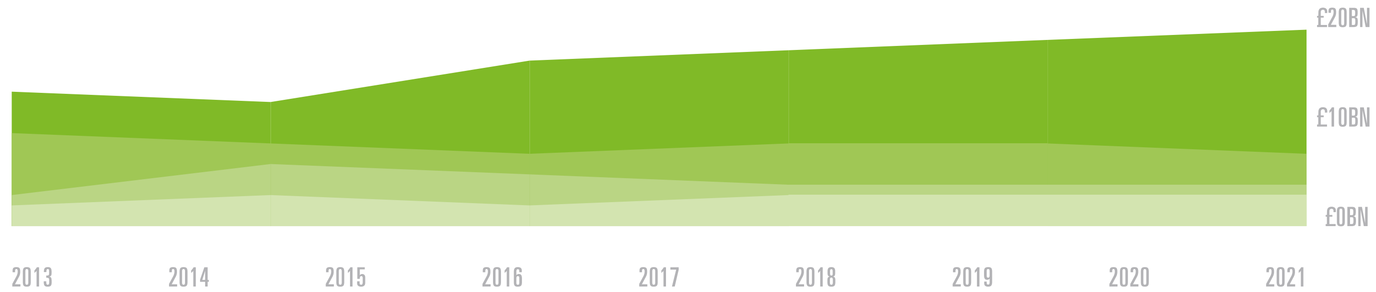


SHOPPER MISSION

IN AN INDEPENDENT[11]

FUTURE GROWTH PREDICTIONS FOR CONVENIENCE MISSIONS

CONVENIENCE CHANNEL - VALUE OF THE MISSION - FORECASTED[11]



TOP UP	NEWSAGENT	FOOD TO GO	MEAL FOR TONIGHT
£18.6 BN	£7.4 BN	£3.9 BN	£2.8 BN

FOOD ON THE GO

WHEN ASKED "DO YOU REGULARLY EAT LUNCH ON THE GO?" I.E. DO NOT STOP WHAT YOU'RE DOING TO CONSUME IT

BRITVIC

[10]him! 2016 Future of Convenience. [11]him! 2016 CTP 2016

[11]him! 2016 CTP 2016. [12]him! 2017

RIGHT CHOICE, RIGHT VALUE

As competition within Convenience continues to increase, delivering improvements in quality and service will help retailers stand out from the crowd and unlock future growth. Growing consumer interest in shopping locally presents an opportunity for retailers to achieve this. However, this can only happen if retailers have the right solutions in place. This includes everything from stocking a range that taps into growing trends and ensuring ample space for NPD, through to offering the right pricing and added-value offerings, such as price marked packs or promotions. With soft drinks growing year-on-year as a footfall driver to convenience stores, the category has an important role to play in helping retailers attract these shoppers. By keeping these elements front of mind and tailoring their soft drinks offering by engaging and listening to the specific needs of their customers, retailers will be able to harness the true sales potential of soft drinks for the future.

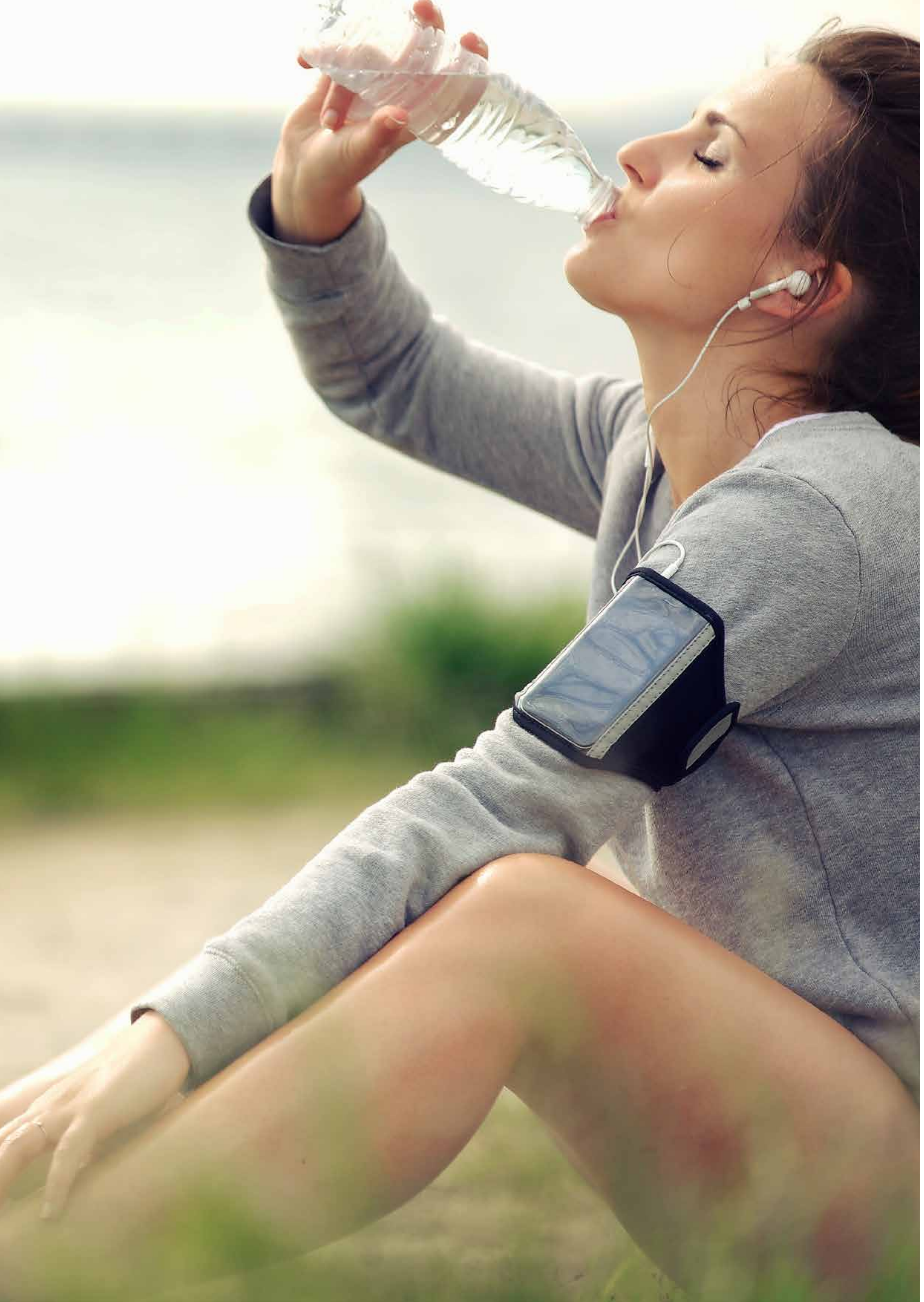
FOOD-ON-THE-MOVE

As more consumers follow a ‘right here, right now’ mind set and foodservice operators continue to attract high footfall through compelling food-to-go offers, retailers will need to fight for a ‘share of stomach’. In order to compete, retailers will need to think carefully about adapting their soft drinks offerings in the chiller space for different customer need-states, such as hydration, energy boosters or meal accompaniments, to cater for the immediate nature of the food-on-the-move occasion.

said they would be more likely to visit a store with a break out area to sit and eat/drink

BRITVIC

[12]him! 2016 The Future of Convenience



MIND THE HEALTH GAP

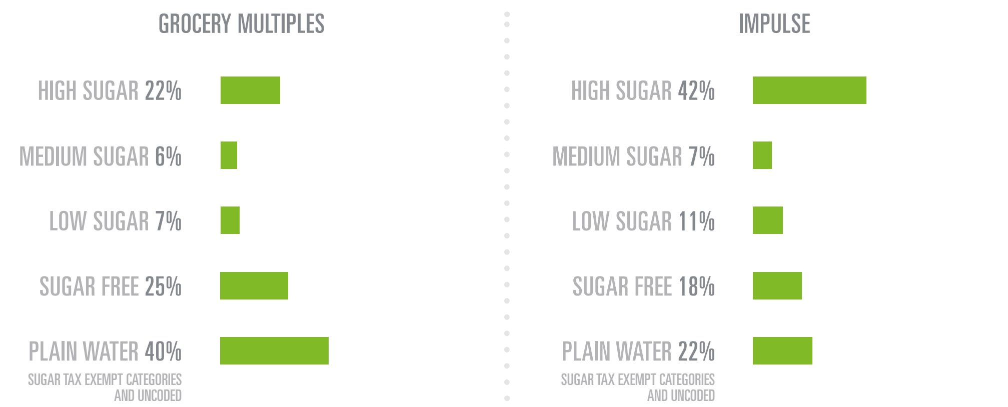
Based on existing trends we've seen develop in recent years, it can be expected that more growth will come through sales of soft drinks with vitality or health credentials. However, as Impulse currently under trades in low calorie soft drinks versus Grocery Mults, this could represent itself as an opportunity, or a risk, as the health trend continues to drive sales within the category.

Retailers who can close this gap and tap into the health trend by increasing their focus on healthier products, while maintaining a level of choice, will be more likely to benefit as a result. It is too early at this stage to know what the true impact of the Soft Drinks Industry Levy will be but this should be a consideration for retailers, who will need to adapt their range to ensure they are fit for the future.

TOTAL IMPULSE

CURRENTLY UNDER TRADES IN LOW CALORIE SOFT DRINKS VERSUS GROCERY MULTIPLES[14]

CHANNEL SOFT DRINKS SALES SPLIT BY SUGAR LEVEL (£%)



***High Sugar** (8g + per 100ml), **Medium Sugar** (5g-7.9g per 100ml), **Low Sugar** (0.6g – 4.9g per 100ml), **Sugar Free** (no more than 0.5g per 100ml), Plain Water, Sugar Tax Exempt Categories and Uncoded includes plain water, pure juice, smoothies, dairy and iced coffee.*

[14]Nielsen Scantrack Data to w/e 31.12.16

Definitions / Glossary

Convenience – in the Britvic report data, Nielsen's Total Impulse read covers multiple impulse stores (e.g: multiple forecourts, multiple off licence, convenience multiples and symbol groups) and Independent stores

Carbonates – a drink made predominantly from carbonated water to which juice or flavourings have been added.

Cola – cola-flavoured carbonated drinks, including cola with flavours such as cherry, twist of lemon, etc. Includes all clear and coloured colas.

Fruit Flavoured Carbonates – flavours are typically orange, cherry, lime, blackcurrant, apple, pineapple and grapefruit, lemon, lemon and lime, tropical and other mixed fruit flavours. Also includes Tizer, Dr Pepper and Vimto, as these brands now contain fruit.

Non-Fruit Carbonates – Non-fruit flavoured carbonates, excluding cola but including Irn Bru. Also includes traditionals such as cream soda, ginger beer and shandy.

Lemonade – All conventional clear and cloudy or traditional, carbonated lemonade; flavoured with lemon juice and additional fruit flavours to produce coloured lemonade.

Energy Drinks – All 'energy boosting' drinks such as Red Bull, normally fizzy.

Sport Drinks – Drinks that are specifically designed to replace minerals, sugars, trace elements and fluids as a result of exercise. Can include dilutables and powders.

Squash – Concentrated beverage, commonly called squash, cordial or syrup. Must be diluted prior to consumption.

Mixers – All drinks intended to dilute an alcoholic beverage, as well as being consumed as a standalone soft drink.

Iced Tea & Coffee – Includes cold soft drinks that are tea and coffee based such as Lipton Ice Tea.

Smoothies – Generally drinks described as smoothie, either in brand name or as a descriptor on the packaging. Drinks described as thickie will also be included.

Dairy Drinks – Ready to drink milk or milk substitute to which flavouring or juice has been added. May consist of any type of milk, regardless of fat content.

Juice Drinks – A non-carbonated drink which generally contains fruit juice (some may not) plus added water or other ingredients.

Pure Juice – A non-carbonated 100% pure juice or other juice blend with no added water or sweetener, that may be chilled or long-life. Includes all concentrated juices, with the exception of frozen juice.

Water – Still or sparkling water with nothing else added.

Flavoured water – Sparkling or still flavoured water.

Convenience & Impulse Data

SOFT DRINKS SEGMENTS PERFORMANCE IN CONVENIENCE

	Value Sales	Value % Chg YA	Value Abs Diff vs YA	Volume Sales	Volume % Chg YA	Volume Abs Diff vs YA
TOTAL SOFT DRINKS	2,074,177,956	0.9	18,198,606	1,291,112,706	1.6	20,774,464
COLA	481,762,009	0.4	1,839,124	352,838,338	3.3	11,411,954
COLD HOT DRINKS	22,614,948	2.3	506,481	6,674,200	-3.3	-227,121
DAIRY AND DAIRY SUBSITUTE	63,942,663	-0.2	-143,792	26,020,085	-0.1	-37,079
FRUIT CARBONATES	202,893,210	0.9	1,870,124	134,651,270	0.8	1,096,048
GLUCOSE STIMULANT DRINKS	530,651,926	0.6	3,284,795	214,896,385	-0.4	-847,033
JUICE DRINKS	177,087,696	-3.0	-5,485,116	84,692,505	-0.5	-402,265
LEMONADE	26,526,567	-2.7	-744,241	45,338,343	-3.1	-1,467,083
NON FRUIT CARBONATES	52,365,639	-3.3	-1,794,539	45,658,412	-0.8	-348,471
PLAIN WATER	226,115,775	7.5	15,782,247	200,967,026	5.1	9,741,830
PURE JUICE	66,719,861	1.0	678,784	34,687,903	0.4	154,556
SMOOTHIES	19,181,722	13.5	2,285,146	4,529,658	14.7	582,147
SPORTS DRINKS	76,435,766	-1.6	-1,213,917	47,547,995	-1.6	-768,680
SQUASHES	35,223,208	-6.5	-2,440,589	27,090,906	-1.1	-307,663
TRADITIONAL MIXERS	14,954,542	6.4	898,331	13,820,503	9.1	1,153,871
WATER PLUS	77,702,467	3.8	2,875,768	51,699,235	2.1	1,039,462

Total Impulse | Nielsen 52 weeks to w/e 31.12.16

LEADING DISTRIBUTORS IN CONVENIENCE

	Value Sales	Value % Chg YA	Value Abs Diff vs YA	Volume Sales	Volume % Chg YA	Volume Abs Diff vs YA
THE COCA COLA COMPANY	652,647,231	-0.1	-719,159	386,965,840	1.3	4,908,635
LUCZD-RBN-SNTRY	261,979,780	0.7	1,693,832	117,322,510	0.7	765,343
BRITVIC	242,355,342	6.9	15,725,894	190,005,156	13.0	21,856,745
DANONE	170,966,360	0.2	342,025	134,119,200	-0.2	-282,126
BARRS	122,081,766	-1.0	-1,191,200	92,079,677	-2.5	-2,333,682
PRIVATE LABEL	48,420,963	-12.3	-6,799,028	52,575,939	-16.0	-10,027,145
NESTLE WATERS	37,101,074	-0.9	-344,031	23,746,747	-2.7	-648,925
TROPICANA UK	27,400,697	3.0	789,871	9,346,124	6.1	538,224
HIGHLAND SPRING	19,253,298	-3.9	-771,931	19,633,021	-1.7	-330,252
INNOCENT	11,501,084	3.0	333,712	2,919,982	-1.1	-31,357

Total Impulse | Nielsen 52 weeks to w/e 31.12.16

TOP 10 BRAND PERFORMANCE IN CONVENIENCE

	Value Sales	Value % Chg YA	Value Abs Diff vs YA	Volume Sales	Volume % Chg YA	Volume Abs Diff vs YA
PRIVATE LABEL	48,420,964	-12.3	-6,799,028	52,575,939	-16.0	-10,027,143
COCA COLA NON ALCHLC BVRGS	342,910,476	-2.8	-10,059,086	220,039,111	-0.5	-1,170,773
PEPSI COLA NON ALCHLC BVRGS	130,323,329	11.8	13,750,678	119,932,313	15.5	16,123,953
LUCOZADE	194,879,504	-0.5	-1,029,915	88,609,700	-0.5	-407,859
RED BULL	157,641,076	2.5	3,789,988	31,883,397	3.5	1,075,181
ROBINSONS	37,107,779	-8.9	-3,621,784	21,699,286	-6.1	-1,418,926
INNOCENT	10,402,300	7.4	717,597	2,599,295	4.1	101,619
TROPICANA	24,262,513	4.8	1,104,741	8,283,514	8.1	623,784
VOLVIC	105,872,308	-0.2	-204,460	85,979,117	1.4	1,215,738
EVIAN	63,735,676	0.9	598,038	47,579,451	-3.0	-1,468,488

* Coca Cola Beverages – includes Coca Cola, Diet Cola, Coke Zero and Coca Cola Life and Pepsi Cola Beverages includes Pepsi, Diet Pepsi, Pepsi Max

Nielsen Scantrack Total Impulse MAT w/e 31st Dec 2016

SOFT DRINK SEGMENT PERFORMANCE IN HIGH STREET

	Value Sales	Value Growth % YA	Value Abs Diff vs YA	Litres	Litres Growth Actual YA	Litres Growth % YA
Total Soft Drinks	255,541,952	2.2	5,486,688	159,864,192	5,522,128	3.6
Total Cola	63,214,792	-0.4	-249,836	47,167,860	895,756	1.9
Total Cold Hot Drinks	1,871,767	-23.3	-568,806	904,761	-287,155	-24.1
Total Fruit Carbs	23,089,980	5.1	1,115,970	15,155,928	1,457,941	10.6
Total Glucose	22,081,960	3.9	828,702	11,531,741	734,414	6.8
Total Juice Drinks	25,610,418	-3.6	-969,666	12,328,034	-309,087	-2.4
Total Lemonade	3,021,350	-4.7	-149,012	4,763,819	-125,073	-2.6
Total Non-fruit Carbs	4,439,045	-0.7	-32,579	3,092,608	53,509	1.8
Total Other Category	312,825	-19.1	-73,724	109,788	-8,323	-7.0
Total Plain Water	24,553,880	2.1	507,614	24,371,220	-40,598	-0.2
Total Pure Juice	11,054,100	6.6	682,378	4,873,414	410,518	9.2
Total Smoothies	8,538,359	9.2	721,208	2,432,130	270,637	12.5
Total Sports	7,100,251	0.1	5,199	3,647,821	-6,851	-0.2
Total Squash	4,343,156	-3.2	-144,293	3,269,318	-6,942	-0.2
Total Stimulants	37,841,476	2.7	994,268	13,995,368	339,752	2.5
Total Traditional Mixers	1,076,161	13.3	126,372	864,000	160,929	22.9
Total Water Plus	17,392,426	18.3	2,692,887	11,356,380	1,982,697	21.2

High Street | IRI 52 weeks to w/e 1.1.17

SOFT DRINKS SEGMENTS PERFORMANCE IN ROADSIDE - PETROL MULTIPLES

	Value Sales	Value Growth % YA	Value Abs Diff vs YA	Litres	Litres Growth Actual YA	Litres Growth % YA
Total Soft Drinks	175,785,920	-4.9	-9,003,168	73,728,248	-3,594,712	-4.6
Total Cola	38,287,856	-4.6	-1,836,172	18,376,418	-1,002,536	-5.2
Total Cold Hot Drinks	975,062	-8.1	-86,362	327,752	-25,593	-7.2
Total Fruit Carbs	8,743,899	-2.9	-265,714	3,669,901	-233,576	-6.0
Total Glucose	15,607,608	-13.4	-2,423,584	5,694,687	-922,416	-13.9
Total Juice Drinks	13,707,481	-11.3	-1,752,083	4,631,669	-618,315	-11.8
Total Lemonade	1,106,347	9.8	98,378	923,996	60,321	7.0
Total Non-fruit Carbs	2,441,532	0.1	1,904	1,186,489	-11,812	-1.0
Total Other Category	133,589	213.7	90,999	28,008	19,591	232.8
Total Plain Water	28,772,900	4.4	1,217,678	20,103,554	267,528	1.3
Total Pure Juice	4,485,795	3.5	150,770	1,178,753	44,271	3.9
Total Smoothies	2,138,672	-2.4	-52,574	355,686	-24,967	-6.6
Total Sports	5,744,421	-20.5	-1,477,522	2,102,128	-518,008	-19.8
Total Squash	758,487	-6.5	-53,096	323,881	-385	-0.1
Total Stimulants	44,231,512	-6.0	-2,805,344	10,335,719	-577,207	-5.3
Total Traditional Mixers	234,905	27.1	50,066	149,201	38,400	34.7
Total Water Plus	8,415,845	1.7	139,485	4,340,410	-90,004	-2.0

Roadside - Petro Multiplesl | IRI 52 weeks to w/e 1.1.17

SOFT DRINKS SEGMENTS PERFORMANCE IN TRAVEL

	Value Sales	Value Growth % YA	Value Abs Diff vs YA	Litres	Litres Growth Actual YA	Litres Growth % YA
Total Soft Drinks	146,259,920	7.0	9,603,456	59,464,356	4,368,984	7.9
Total Cola	22,828,168	1.2	276,754	8,524,823	216,816	2.6
Total Cold Hot Drinks	2,254,006	-6.8	-163,174	713,296	-52,227	-6.8
Total Fruit Carbs	10,603,181	8.2	799,492	3,614,250	355,945	10.9
Total Glucose	6,566,397	3.5	225,080	2,151,929	116,462	5.7
Total Juice Drinks	11,754,252	-6.7	-840,064	3,663,148	-215,328	-5.6
Total Lemonade	466,995	-7.1	-35,728	193,991	650	0.3
Total Non-fruit Carbs	1,929,204	3.6	67,398	677,833	44,452	7.0
Total Other Category	312,359	38.5	86,751	74,521	24,196	48.1
Total Plain Water	46,911,360	2.8	1,287,912	26,661,414	342,320	1.3
Total Pure Juice	6,797,906	17.8	1,027,351	1,604,691	257,032	19.1
Total Smoothies	4,671,886	16.8	671,480	879,369	135,618	18.2
Total Sports	2,685,240	-2.9	-80,417	856,322	-11,362	-1.3
Total Squash	486,578	-15.1	-86,416	113,328	2,462	2.2
Total Stimulants	10,590,145	6.4	634,928	2,159,661	196,531	10.0
Total Traditional Mixers	0	-100.0	-3	0	-2	-100.0
Total Water Plus	17,402,252	49.1	5,732,124	7,575,780	2,955,420	64.0

Travel | IRI 52 weeks to w/e 1.1.17

SOFT DRINKS SEGMENTS PERFORMANCE IN SYMBOLS

	Value Sales	Value % Chg YA	Value Abs Diff vs YA	Volume Sales	Volume % Chg YA	Volume Abs Diff vs YA
Total Soft Drinks	932,490,632	0.1	1,163,394	652,946,627	0.8	5,354,721
COLA	226,309,625	1.3	2,833,732	184,811,966	4.1	7,306,886
COLD HOT DRINKS	7,309,182	-4.2	-317,444	2,430,734	-4.6	-116,653
DAIRY AND DAIRY SUBSITUTE	35,286,408	1.6	570,816	14,942,749	4.2	596,286
FRUIT CARBONATES	102,224,493	-0.0	-3,292	74,847,965	-0.5	-396,631
GLUCOSE STIMULANT DRINKS	239,961,367	1.5	3,521,681	107,467,823	-0.0	-2,458
JUICE DRINKS	78,353,914	-2.3	-1,880,245	41,549,607	-0.1	-56,672
LEMONADE	14,625,829	-4.6	-708,775	26,979,303	-3.3	-910,186
NON FRUIT CARBONATES	29,450,474	-3.2	-966,558	29,067,815	-0.8	-225,135
PLAIN WATER	64,441,970	-0.1	-59,818	73,999,589	-1.0	-723,649
PURE JUICE	31,983,904	-5.6	-1,900,029	19,601,170	-4.0	-817,592
SMOOTHIES	3,581,372	12.2	388,568	785,251	12.4	86,330
SPORTS DRINKS	38,254,610	2.5	938,665	26,393,278	2.8	713,841
SQUASHES	22,129,493	-8.7	-2,120,944	17,814,871	-2.9	-537,266
TRADITIONAL MIXERS	8,421,294	1.6	131,189	8,715,764	7.5	605,135
WATER PLUS	30,156,740	2.5	735,853	23,538,785	-0.7	-167,511

Nielsen Scantrack Symbols MAT w/e 31st Dec 2016

SOFT DRINKS SEGMENTS PERFORMANCE IN INDEPENDENTS

	Value Sales	Value % Chg YA	Value Abs Diff vs YA	Volume Sales	Volume % Chg YA	Volume Abs Diff vs YA
Total Soft Drinks	392,567,445	-2.5	-9,876,229	245,450,108	-0.7	-1,811,466
COLA	93,153,495	-2.0	-1,933,860	62,805,222	2.2	1,332,131
COLD HOT DRINKS	2,397,788	0.7	17,383	858,882	-4.7	-42,145
DAIRY AND DAIRY SUBSITUTE	10,987,482	-5.9	-692,593	4,345,377	-9.7	-465,950
FRUIT CARBONATES	44,593,054	-2.1	-967,034	27,802,032	-1.9	-529,863
GLUCOSE STIMULANT DRINKS	111,147,089	-2.8	-3,184,012	48,440,550	-4.8	-2,435,635
JUICE DRINKS	34,155,822	-1.9	-675,076	17,307,763	1.8	301,062
LEMONADE	4,395,371	-5.1	-237,943	7,184,430	-3.5	-263,387
NON FRUIT CARBONATES	11,446,279	-7.2	-883,093	9,624,127	-5.4	-547,029
PLAIN WATER	34,201,770	3.4	1,116,167	34,662,765	5.4	1,764,602
PURE JUICE	8,915,019	-6.9	-656,647	5,268,948	-3.5	-189,110
SMOOTHIES	550,010	23.4	104,150	113,763	21.1	19,799
SPORTS DRINKS	17,680,860	-8.2	-1,573,388	12,203,763	-10.7	-1,462,350
SQUASHES	5,076,996	-6.3	-341,426	3,794,798	1.8	68,049
TRADITIONAL MIXERS	2,466,307	4.1	96,763	2,048,914	11.3	208,231
WATER PLUS	11,400,106	-0.6	-65,615	8,988,780	5.0	430,139

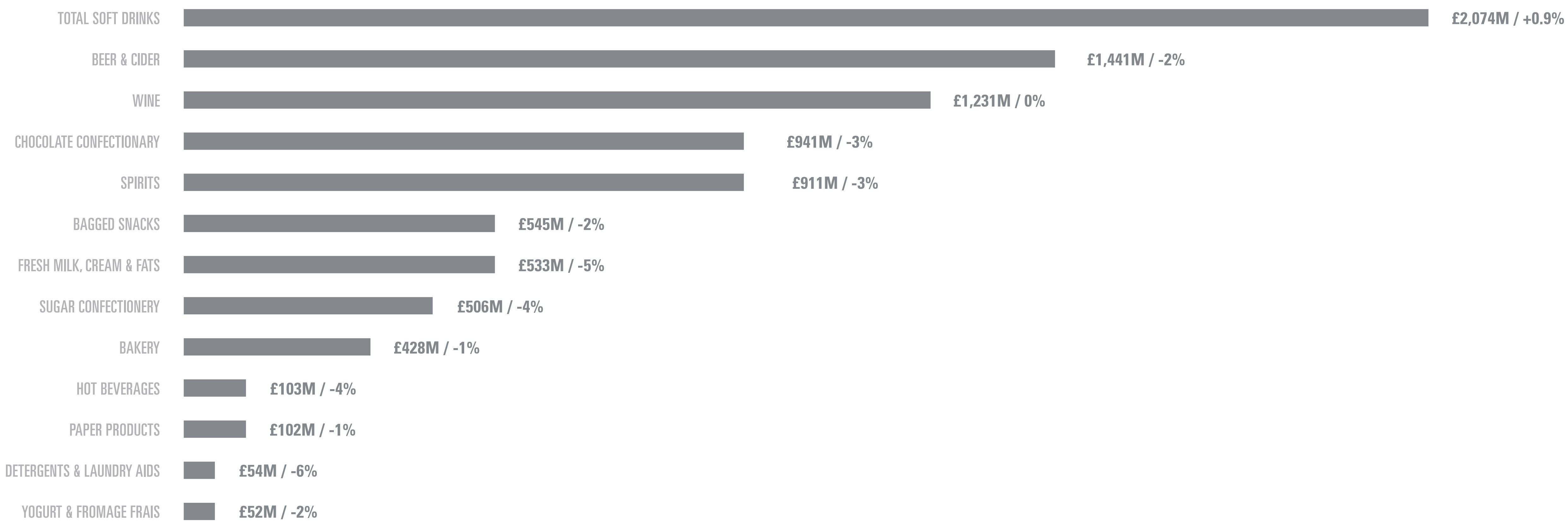
Nielsen Scantrack Independents MAT w/e 31st Dec 2016

CONVENIENCE - SOFT DRINKS IN CONTEXT

VALUE SALES £(M) / % CHANGE YOY

CONVENIENCE - SOFT DRINKS IN CONTEXT

VALUE SALES £(M) / % CHANGE YOY



Nielsen Scantrack Total Impulse MAT w/e 31st Dec 2016

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