

# SOFT DRINKS REVIEW 2025

CARLSBERG  
BRITVIC



**CONVENIENCE  
& IMPULSE**

# WELCOME

## TO THE CARLSBERG BRITVIC SOFT DRINKS REVIEW

### A JOURNEY OF REINVENTION

A lot happened in soft drinks in 2024, and it's certainly been a fast start for us at Carlsberg Britvic in 2025. The soft drinks category is still fizzing, demonstrating agility and it is one which continues to impress me when it comes to innovation. Soft drinks is a true tale of smart innovation and remarkable reinvention.

As a business, you could say we have been through our own reinvention as well. The acquisition between two specialist businesses has come into effect, creating a beverage powerhouse we're incredibly proud of. Carlsberg Britvic as one entity is uniquely placed to offer our customers insight and data at a total beverage level. From squash, carbonates, energy, iced coffee, tonics, and health shots; to craft beer, ales and cider; we bring a new perspective on how customers are enjoying drinks across a multitude of sub-categories. Within the coming chapters, we're focusing on our annual review of soft drinks specifically, but there are, and always have been, synergies between alcoholic and non-alcoholic options.

Across channels, soft drinks grew in value and volume last year and choices are diversifying. The innovation we've seen is truly impressive and so it's no surprise the category is engaging shoppers in a way that is not only maintaining

sales, it's growing them. And we're not just innovating when it comes to flavours, we're creating concepts. Concepts which hold an emotional connection with consumers. The Robinsons collaboration with the Wicked movie is one example – this was a partnership beyond one standalone lever. This was a partnership which brought the spirit of the movie to life through multiple touchpoints, and we've been blown away by its success.

A stalwart brand, Pepsi MAX® continues to perform well, proving that consumers across channels are still seeking out its zero sugar, maximum taste premise. Low and no sugar options maintain their relevance, but we still see indulgence playing a role within these realms. Our latest additions to the Pepsi range, Strawberries 'N' Cream and Cream Soda, are the latest example and again, this isn't just product innovation, it's a concept that has taken the TikTok generation by storm. Jimmy's Iced Coffee has seen success with its rotational flavour series which brings a touch of fun and indulgence with Cinnamon Roll and Donut flavours.

Of course, within a category that can be somewhat reliant on good weather, it hasn't been pure sunny skies, and it won't be as we look ahead. There has been continued





cutbacks from consumers in their spending, impacting all channels, although hospitality often bears the brunt of being one of the first places to take a hit. People cut how often they eat out to save the pennies. And we know there is a backdrop of growing economic and sociopolitical uncertainty to contend with. But that's prevalent in beer and a number of FMCG categories as well.

I note across the coming chapters that soft drinks are in a strong position to weather any storms ahead. There are a number of legislation changes across 2025 including Extended Producer Responsibility (EPR), which has a costly implication on glass packaging for manufacturers and could impact consumer choice. But it is coming at a time when we're seeing a consumer driven trend for can formats, which are not subject to EPR fees but will be included in a Deposit Return Scheme from 2027. Manufacturers across beverage categories are seeing cans winning, and more slim line cans are emerging as companies look to premiumise the format and answer consumer demand.

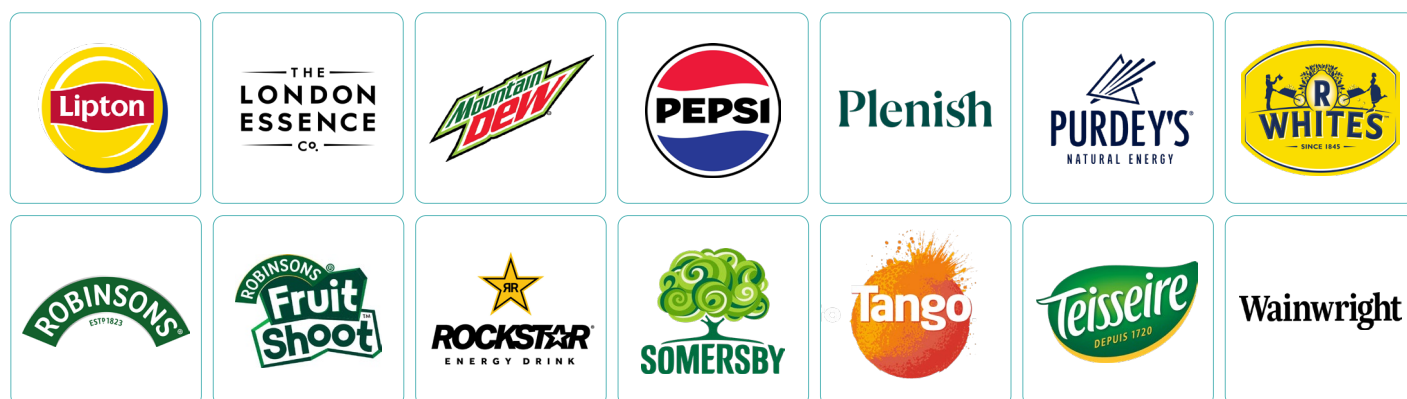
Planning for the UK-wide Deposit Return Scheme is underway, which we continue to support, and we will take learnings from Ireland with us on the journey.

There is never a dull moment in soft drinks or beer, manufacturers are certainly kept busy, and we can look back on a successful 2024.

Looking ahead, there is a lot for soft drink producers to be optimistic about in this thriving category. On a more personal note, Carlsberg Britvic has a lot to look forward to as well. We're in a stronger position together as one to continue delivering positive change throughout the UK and innovating across our beverage portfolio to keep consumers on their toes and thirsty for more.



**Paul Davies**  
CEO of  
Carlsberg Britvic











# STAYING TRUE TO OUR PATH

To say global affairs have been reshaped by seismic upheavals in the past year would be an understatement. Conventions that have long governed trade and politics have been uprooted. Thinking on everything from the environment and defence to diversity and inclusion is being challenged. People are more polarised.<sup>1</sup> The political landscape is fragmenting.<sup>2</sup>

All this comes as we digest the clearest evidence yet of how human activity is changing the climate: 2024 was the warmest year ever recorded<sup>3</sup> and the first year in which the global average temperature was 1.5°C warmer than pre-industrial levels.<sup>3</sup> Given that this was the 'point of no return'<sup>4</sup> net zero policies were developed to help us avoid, it would be easy to become despondent, regardless of your politics.



<sup>1</sup> [https://www.allianz.com/en/economic\\_research/insights/publications/specials\\_fmo/241118-social-resilience-index.html](https://www.allianz.com/en/economic_research/insights/publications/specials_fmo/241118-social-resilience-index.html)

<sup>2</sup> <https://www.professionaladviser.com/opinion/4413226/political-fragmentation-means-financial-planning>

<sup>3</sup> WMO - <https://wmo.int/news/media-centre/wmo-confirms-2024-warmest-year-record-about-155degc-above-pre-industrial-level>

<sup>4</sup> <https://www.aljazeera.com/news/2023/3/20/point-of-no-return-un-report-to-provide-stark-climate-warning>

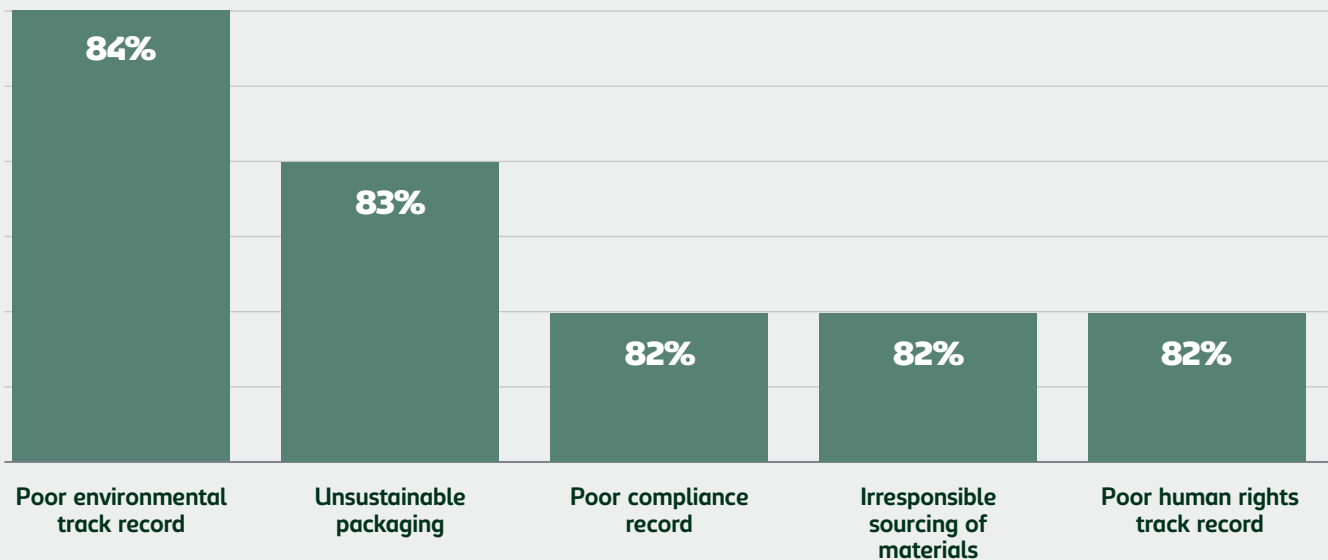
Some companies are scaling back on their sustainability, diversity and inclusion policies.<sup>5</sup> In explanation, CEOs have cited unforeseen or underestimated complexities in becoming carbon neutral,<sup>6</sup> while others have said that changes in political leadership in their key markets have led to them rethinking their ESG policies.<sup>7</sup> But at Carlsberg Britvic we're staying true to our path.

That is to help people to enjoy life's everyday moments with a wide range of drinks for every occasion, while building a better tomorrow. We want our actions to demonstrate courage and show that we care as a business,

while bringing people together. And we're proud to point to several tangible examples of how we've been progressing on this path at pace in the past year.

The basis of our approach is that the health of people and planet are intrinsically linked and that you cannot have one without the other. This idea is supported by several influential studies.<sup>8</sup> There's a third element to this, of course. Aside from any ethical arguments for sustainability, improving the health of people and planet also makes good business sense.

## MOST COMMON ENVIRONMENTAL FACTORS ALIENATING SHOPPERS FROM BRANDS<sup>9</sup>



After all, one 2024 study found that more than three quarters (78%)<sup>10</sup> of people in the UK say they consider sustainability when shopping and that 55%<sup>10</sup> are willing to pay more for products that are less environmentally damaging than alternatives. Another study cast light on how much more they're prepared to pay: on average UK shoppers found a 9.7%<sup>11</sup> premium for more sustainable products acceptable.

That's encouraging, particularly when you consider the pressure people's finances have been under in recent years. This may well give companies that have scaled back on

their sustainability commitments pause for thought. So too will analysis that reveals the environmental factors that are most likely to alienate shoppers from brands. A generally poor environmental track record, unsustainable packaging and poor compliance came top.<sup>9</sup>

All this helps to explain why Carlsberg Britvic and other producers remain focused on our commitments to reduce the impact we have on the planet and improve the health and happiness of people in our organisations and wider society. Here are some examples of how this is being achieved...

<sup>5</sup> <https://hbr.org/2024/08/companies-are-scaling-back-sustainability-pledges-heres-what-they-should-do-instead>

<sup>6</sup> WMO - <https://wmo.int/news/media-centre/wmo-confirms-2024-warmest-year-record-about-155degc-above-pre-industrial-level>

<sup>7</sup> <https://www.theguardian.com/business/2025/feb/28/uk-based-british-pharma-gsk-pauses-diversity-work-citing-trump-orders>

<sup>8</sup> Health Promotion International, 08.01.13 - <https://academic.oup.com/heapro/article/29/3/558/754800>

<sup>9</sup> ISO-Cert Online - <https://www.uswitch.com/gas-electricity/green-energy/green-consumer-statistics/>

<sup>10</sup> The Round Up - <https://theroundup.org/environmentally-conscious-consumer-statistics/>

<sup>11</sup> PWC - <https://www.pwc.com/gx/en/news-room/press-releases/2024/pwc-2024-voice-of-consumer-survey.html>



## OUR YEAR IN NUMBERS

### HEALTH & COMMUNITY

**11**

calories per 250ml serve in Great Britain<sup>12</sup>  
(down from 12.5 in 2023)

**892**

days spent volunteering for charitable causes by employees in Great Britain and Ireland<sup>12</sup>

**100**

British schools benefitted from sessions provided by psychological fitness charity Bounce Forward thanks to Britvic support<sup>12</sup>

### THE ENVIRONMENT

**29%**

recycled plastic packaging content in Great Britain<sup>12</sup>

**75%**

of grid electricity in Great Britain for our soft drinks business comes from solar panels<sup>13</sup>

**34.6m**

litres of water savings identified at our Rugby factory through student mentoring programme<sup>14</sup>

### OUR BUSINESS

**£25m**

invested on upgrading our National Distribution Centre in Lutterworth, Leicestershire<sup>15</sup>

**2,000**

London Essence Company Freshly Infused fountains installed in UK hospitality<sup>16</sup>

**33.9%**

value growth for Jimmy's Iced Coffee (L52W)<sup>17</sup>

It goes without saying; 'health' can mean different things to different people. That's where choice comes in and ensuring that a range of healthier options are available which still deliver on great taste, refreshment and excitement. Sugar-free is one of the areas of choice and these drinks can still pack a punch. Carlsberg Britvic has proven this with innovation such as Tango Mango, Pepsi Electric and Aqua Libra Watermelon & Strawberry – all sugar-free.

It's not just us, of course. All the big brands have significantly increased the size of their low and no-sugar drinks portfolios over the past decade or so, with recent examples including the launch of Red Bull Zero<sup>18</sup> – a zero-sugar and zero-calorie energy drink with a flavour profile similar to that of the brand's core full-sugar product – and Irn-Bru's new Nessie Nectar and Unicorn Tears flavoured drinks.<sup>19</sup>

We're also building our portfolio of natural functional health drinks. The Plenish health shots range has been fortified

with vitamins B1, B2 and D and expanded with products like Mango Sunshine, Beet Balance and (most recently) Ginger Energy. The Jimmy's Iced Coffee collaboration with Myprotein to produce a delicious protein iced coffee is another example.



<sup>12</sup> Page 5 – Britvic Annual Report & Accounts 2024

<sup>13</sup> Page 9 – Britvic Annual Report & Accounts 2024

<sup>14</sup> Page 11 – Britvic Annual Report & Accounts 2024

<sup>15</sup> Page 4 – Britvic Annual Report & Accounts 2024

<sup>16</sup> Page 16 – Britvic Annual Report & Accounts 2024

<sup>17</sup> NIQ Scantrack Category Data, RTD Coffee, Total Coverage; Latest 52 weeks to 19.04.25

<sup>18</sup> <https://www.thegrocer.co.uk/news/red-bull-adds-zero-to-sugar-free-lineup/698260.article>

<sup>19</sup> <https://www.thegrocer.co.uk/news/irn-bru-adds-duo-of-zero-sugar-mystery-flavours/703406.article>

## INTRODUCING... **OUR DIVERSITY NETWORK GROUPS**

As a business, we believe that having a diverse workforce with a strong sense of belonging and inclusion is central to our success. To build on this, we have five diversity network groups:



promotes and celebrates the racial, ethnic and cultural diversity of our workforce and encourages employees from all backgrounds to bring their true selves to work



is passionate about attracting, retaining and championing employees with disabilities and diverse abilities



champions gender equity and parity from our factory floors to the boardroom



is a network in which our Mental Health First Aiders and Wellbeing Warriors help employees to create a caring environment in which people feel supported and understood



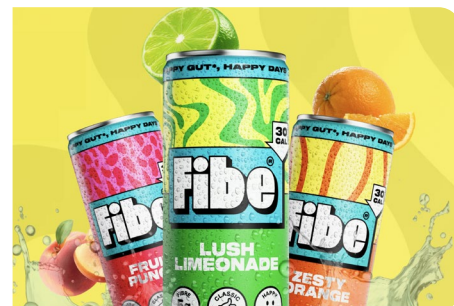
connects and supports our LGBTQIA+ colleagues and allies and is helping to boost inclusion throughout the organisation





The boom in gut-health friendly soft drinks is another case in point. Challenger brands such as Xoxo, Hip Pop and Fibe! are winning growing shelf space in the supermarkets as retailers increase their functional health drinks ranges.<sup>20</sup> PepsiCo's acquisition of US prebiotic soda brand Poppi for just shy of \$2bn in March<sup>21</sup> provides further proof that functional health soft drinks are no longer niche.

We are committed to creating an environment that fosters the health and happiness of our workforce and ensures employees feel engaged, motivated and valued whoever they are. Alongside this, we believe in giving back to the communities we serve with a range of sustainability, inclusivity and social mobility initiatives.



Just as the health of the planet and the people who call it home are intrinsically linked, so too are people's physical and mental health. Poor mental wellbeing has repercussions on physical health and vice versa. That's why we take a holistic approach to supporting wellbeing throughout our organisation and elsewhere.

Within our UK business, we've provided sleep science sessions for more than 400 employees<sup>22</sup> to enable them to get the best out of their nightshifts and strike a better work/life balance, and we continue to offer our workforce a range of initiatives designed to support their physical and mental health needs.

We're also doing our bit in the communities we serve. Informed by our research that found 58%<sup>23</sup> of parents

are concerned about their children's mental resilience and emotional wellbeing and 81%<sup>23</sup> believe mental health should be part of the curriculum, Carlsberg Britvic's employees have nominated nearly 150 schools in their communities to receive fully-funded support from psychological fitness charity Bounce Forward.<sup>23</sup>

That's not all. Since moving our UK headquarters to Hemel Hempstead in 2013, our soft drinks business has been working with Hertfordshire County Council to support people and organisations in need. So far, we've supported 11 projects and awarded more than £44,000 to more than 777 beneficiaries.<sup>24</sup>

Other examples from our communities include the more than £260,000 we've donated to fund counselling,

education and careers advice for young people through our partnership with youth charity, The King's Trust<sup>25</sup>, and the funds we've donated to the Create Space campaign from Brooklyn Brewery and the Stonewall Gives Back Initiative to support grassroots LGBTQ+ initiatives since the UK launch of Brooklyn Brewery's Stonewall Inn IPA.

Our peers are also supporting the physical and emotional wellbeing of people in the communities they serve through a variety of initiatives. These include Coca-Cola Europacific Partners' sponsorship of the Community Hero category of the Great British Pub Awards, which recognises projects in which pubs support those in need in their communities and prize money so they can continue to do so.<sup>26</sup>



<sup>22</sup> Page 18 – Britvic Annual Report & Accounts 2024

<sup>23</sup> <https://www.britvic.com/our-news/people/britvic-partners-with-wellbeing-charity-bounce-forward-to-help-children-build-mental-resilience/>

<sup>24</sup> Page 39 – Britvic Annual Report & Accounts 2024

<sup>25</sup> Page 9 – Britvic Annual Report & Accounts 2024

<sup>26</sup> <https://www.morningadvertiser.co.uk/Article/2025/04/22/how-has-coca-cola-supported-community-pub-heroes/>

## OUR WORK WITH FARESHARE

We are proud to have been supporting FareShare, by donating products for redistribution to people in need and by our staff using some (or all!) of their two paid days a year for volunteering to support the charity since 2019.

In 2024, the number of soft drink serves we've donated to FareShare since we began working with them hit more than 293,000<sup>27</sup>. These have been redistributed to

more than 2,280 charities<sup>27</sup>, reaching people in need at older people's lunch clubs, community centres, homeless shelters and more.

Not only is this a way of giving back to communities it also helps reduce waste (and the carbon emissions associated with this), moving us closer to achieving net zero emissions.



# 293,900

250ml soft drink servings donated since 2019<sup>27</sup>

# 2,280<sup>27</sup>

charities supported through our FareShare partnership

## FOURTH GROCERYAID GOLD AWARD IN AS MANY YEARS

In 2024, our soft drinks and beer businesses were awarded the Gold Award by the charity GroceryAid. For our soft drinks business this is the fourth year we have been recognised for the work we carry out to support the physical and mental wellbeing of people who work in our organisation and live in the wider communities we serve.

GroceryAid provides emotional, financial and practical support for people working in the UK grocery industry. Our employees have continued to raise awareness and funds for the charity over the past year, with many giving up their time to volunteer for GroceryAid.

We're also working hard to support our colleagues in the licensed trade through a variety of initiatives. These include J2O's partnership with the renowned

cricket team Lashings World XI, which will see the Carlsberg Britvic Cricket Day take place at Old Albanians Cricket Club in July, in support of Licensed Trade Charity and Only a Pavement Away, two charities that support vulnerable people working in the hospitality industry.





## LOWERING OUR IMPACT ON THE PLANET

As we've already explored, at a time when the extent to which humanity has altered the global climate is becoming irrefutable, some businesses are scaling back their commitments to reduce the toll they take on the planet. We're doing the opposite and have made significant progress along the path to net zero carbon emissions, as well as reducing packaging waste, water use and our impact on biodiversity.

Since February 2024, 75% of the national grid electricity used to produce soft drinks in the UK has come from a solar farm in Northamptonshire.<sup>28</sup> The 160-acre site, which is benefitting from a rewilding project to boost biodiversity, will provide clean energy to Carlsberg Britvic factories in Rugby, London and Leeds for the next 10 years.<sup>28</sup>

The steps taken in recent years have helped Carlsberg Britvic pass several key landmarks. These include logistics advances that have resulted in 7,200 fewer trucks on UK roads since 2017<sup>28</sup> and transferring many Scottish deliveries from road to rail, saving 3,600 road miles and an estimated 4,700 tonnes of carbon in six years.<sup>28</sup> We are hopeful that efforts being undertaken in 2025 (including a trial of electric freight vehicles) will help Carlsberg Britvic progress further.<sup>28</sup>

By improving the efficiency of production procedures and working with our partners, we're also using less water to produce our drinks. Projects across our

operations in the UK to reduce use of this precious resource continue, such as our partnership with Grundfos, where by utilising Grundfos' Energy Check Advanced Programme data we installed speed controlled e-Pumps that work to manage pressure and bring consistent flow to incoming water. This has allowed us to reduce energy consumption at the water process plant by 60%, improve the longevity of our de-alkalisation beds and increase visibility on performance so we can optimise even further in the future. A brand new initiative in 2024 was a joint project with Rugby High School for Girls, aimed at increasing female participation in engineering careers as well delivering better environmental efficiencies, which resulted in a team of six students identifying steps that will result in savings of 34.6 million litres of water a year (worth £870,000) at our Rugby factory.<sup>30</sup>

Of course, if net zero is going to be achieved, businesses also need to support their suppliers and customers in reducing their environmental impact. That's why organisations like the Sustainable Markets Initiative – which counts Waitrose, McCain and McDonald's among its members and pledged in March to support East Anglian farmers switching to regenerative agriculture<sup>31</sup> – are so important.

<sup>28</sup> Page 52 – Britvic Annual Report & Accounts 2024

<sup>29</sup> <https://www.britvic.com/our-news/people/britvic-blog-improving-water-and-energy-efficiency-at-beckton/>

<sup>30</sup> Page 48 – Britvic Annual Report & Accounts 2024

<sup>31</sup> <https://www.farmersguide.co.uk/rural/environmental/big-corporations-will-support-east-anglia-farmers-in-switching-to-regenerative-farming/>



Another example is the Simpler Recycling initiative – requiring all businesses in England with 10 or more employees to separate their waste into three streams (dry recyclables, food waste and non-recyclable) – which has led to a 34%<sup>32</sup> increase in waste captured for recycling since its implementation in Wales in 2023, followed by England in 2025. As a company that's pledged to cut our packaging per serve and increase its recycled content,<sup>33</sup> we fully support initiatives like this.

That water is essential to life goes without saying. But it must be just the right amount: too little and life withers; too much and we're inundated. While water cleans, nourishes and sustains, it can also cause erosion and floods. So sometimes it needs managing.

That's why we've been working with The Rivers Trust charity since 2021. In 2024, the Trust saw the completion of the £80,000 restoration of a 600m<sup>3</sup> natural floodplain and creation of a meandering channel at Chellow Dene Beck, a West Yorkshire wetlands 10 miles from our Leeds factory.<sup>34</sup>

The scheme improved the capacity of the site to hold water during times of heavy rain and slowed the flow of water down the beck to create a natural flood defence. It also improved habitats for wildlife, allowed native brown trout to move more freely along the beck and provided a beautiful space for local people to enjoy.

At Carlsberg Britvic, we recognise that our business relies on healthy water systems in the communities we serve and are striving to find new ways to become more water efficient in our own operations.

We're proud to have supported the Chellow Dene Beck scheme – which was carried out by the Environment Agency, as well as local authorities and community

groups – to reduce flood risk in the area and provide natural, clean water for the local community. Just the right amount, of course.



<sup>32</sup> <https://www.biffa.co.uk/support-resources/simpler-recycling>

<sup>33</sup> <https://sensationaldrinks.com/partner-with-britvic/sustainability/what-britvic-are-doing/>

<sup>34</sup> <https://airriverstrust.org.uk/blog/2024/09/20/chellow-dene-resurrected/>



## DEPOSIT RETURN SCHEME: LESSONS FROM IRELAND AS UK LAUNCH APPROACHES

In October 2027, the long-awaited Deposit Return Scheme (DRS) for single-use plastic and metal drinks containers will begin in England, Scotland and Northern Ireland. The scheme will charge a deposit on eligible drinks containers, refundable when returned to designated collection points.

Carlsberg Britvic has long supported the development of a nationwide DRS, and we welcomed the government's May announcement of the formation of the Deposit Management Organisation (DMO) to oversee the scheme.

We only need to look at the results delivered by Ireland's DRS, which marked its one-year anniversary in February 2025, for proof of the benefits such schemes can bring. By the end of 2024, more than 980 million<sup>35</sup> single-use drinks containers had been returned across Ireland, stopping millions of plastic bottles and aluminium cans ending up as litter or in landfill.

The benefits are social as well as environmental. In its first year in Ireland, more than 2,000 schools<sup>35</sup>, charities, clubs and community organisations registered with DRS for their own fundraising activities. So far, €900,000<sup>35</sup> (and counting) has been raised by the 'Return for Children' scheme, which allows people across

Ireland to donate their used drinks containers to benefit six children charities, including Barnardo's and Childline by ISPC.

We therefore have high hopes for a UK wide DRS. We believe it will result in a significant reduction in littering and marine pollution, boost the availability of quality recycled plastic for use as packaging, while delivering similar social benefits to those seen in Ireland. The May appointment of the DMO for England, Northern Ireland and Scotland shows that we are nearing the end of the journey to DRS. **That should be celebrated.**

### DRS: the Irish experience

# 980 million

containers collected in first year<sup>35</sup>

# 2,000

charities, schools and community groups registered to use DRS for fundraising<sup>35</sup>

# €90,000

raised by the 'Return for Children' initiative so far<sup>35</sup>



As we touched on above, sustainability shouldn't be viewed in isolation of commercial interests. After all, 72%<sup>36</sup> of shoppers say they are influenced by a desire to be sustainable when they're deciding what food and drink to

put in their baskets. We share these values and continue to place sustainability at the heart of our business strategy. Read on to find out more.

<sup>35</sup> <https://re-turn.ie/many-happy-returns-minister-marks-first-birthday-of-the-deposit-return-scheme/>

<sup>36</sup> Savanta Grocery Eye Q3 2024 - <https://www.foodmanufacture.co.uk/Article/2024/10/25/what-uk-consumers-want-sustainability-trends-in-food-and-drink/>









# CATEGORY OVERVIEW

## STILL FIZZING

Despite all the tumult of the past year, UK soft drinks are still fizzing. Producers have again proven their knack for innovation and reinvention. They've shown remarkable agility and tenacity against a backdrop of growing economic and sociopolitical uncertainty<sup>1</sup> to create an ever-widening array of drinks that refresh, excite and deliver against a rapidly evolving range of consumer needs.

For proof, look no further than the growth the industry has achieved. Overall sales of soft drinks through grocery multiples, convenience and impulse stores, foodservice and licensed venues climbed by 2.2%<sup>2</sup> to hit a total value of more than £21.1bn 2024.<sup>2</sup> Remarkably, considering the general pattern of falling spend on discretionary items throughout the year,<sup>3</sup> overall volumes have also increased by 0.6%.<sup>2</sup> That's an extra 72m litres of soft drinks sold.<sup>2</sup>

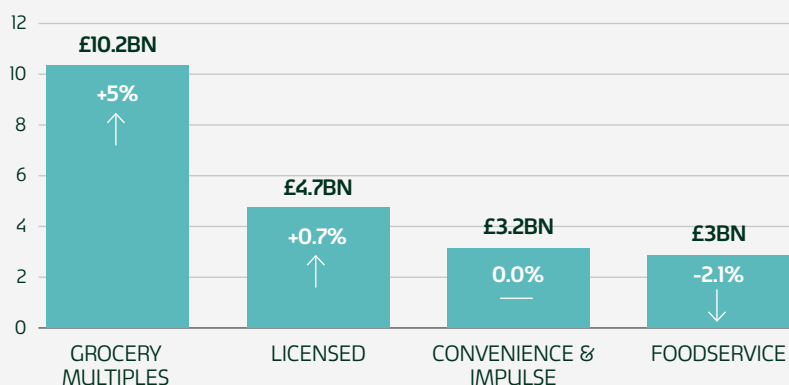
<sup>1</sup> IGD Research Economic Viewpoint: Can UK food prosper in 2025

<sup>2</sup> NIQ & CGA BY NIQ – Grocery Multiples, Convenience & Impulse, Foodservice and Licensed venues – NIQ 52 w/e 28.12.24, CGA by NIQ 31.12.24

<sup>3</sup> NIQ Homescan Panel On Demand 52 w/e 28 December 2024



## SOFT DRINKS SALES CHANNEL BY CHANNEL<sup>4</sup>



OUT OF HOME  
£7.6BN

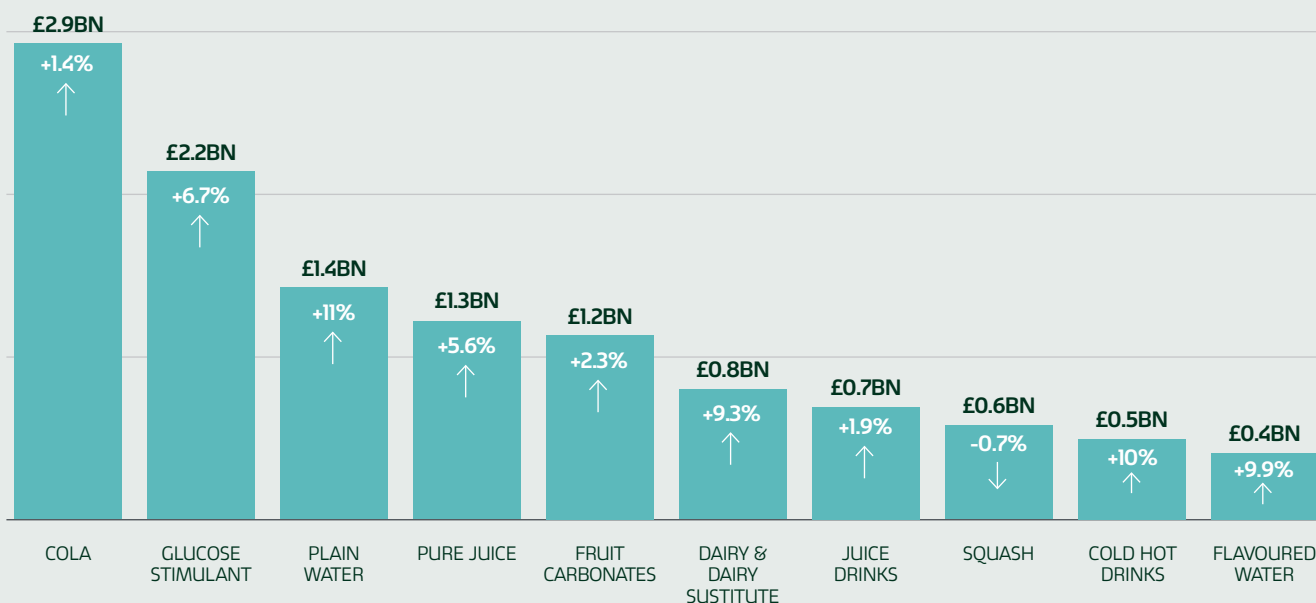


GROCERY,  
CONVENIENCE  
& IMPULSE  
£13.4BN

## TOP OF THE POPS

Drinks choices are diversifying. That means retailers and out-of-home operators need to diversify their ranges while ensuring they maintain their core offerings. In grocery, dairy drinks and alternatives, iced coffees and teas, flavoured waters and juices are all driving growth.<sup>4</sup> Meanwhile, in out-of-home venues, coffee and beverage syrups have delivered much of the growth.<sup>4</sup>

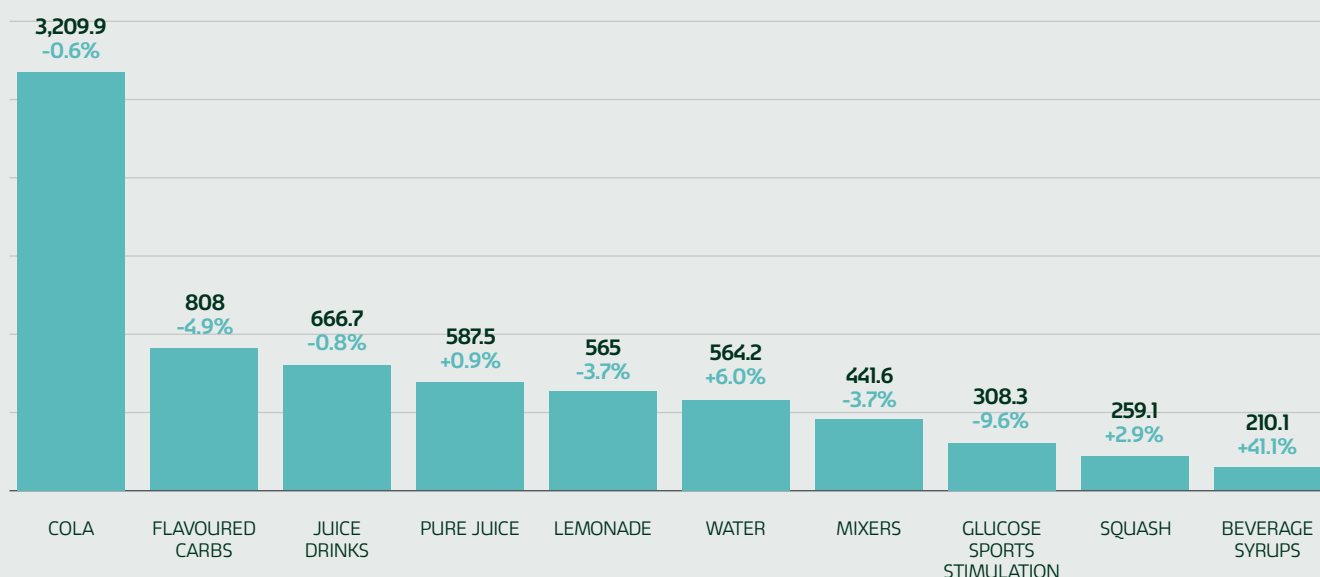
## TOP 10 SOFT DRINKS GROCERY<sup>4</sup>



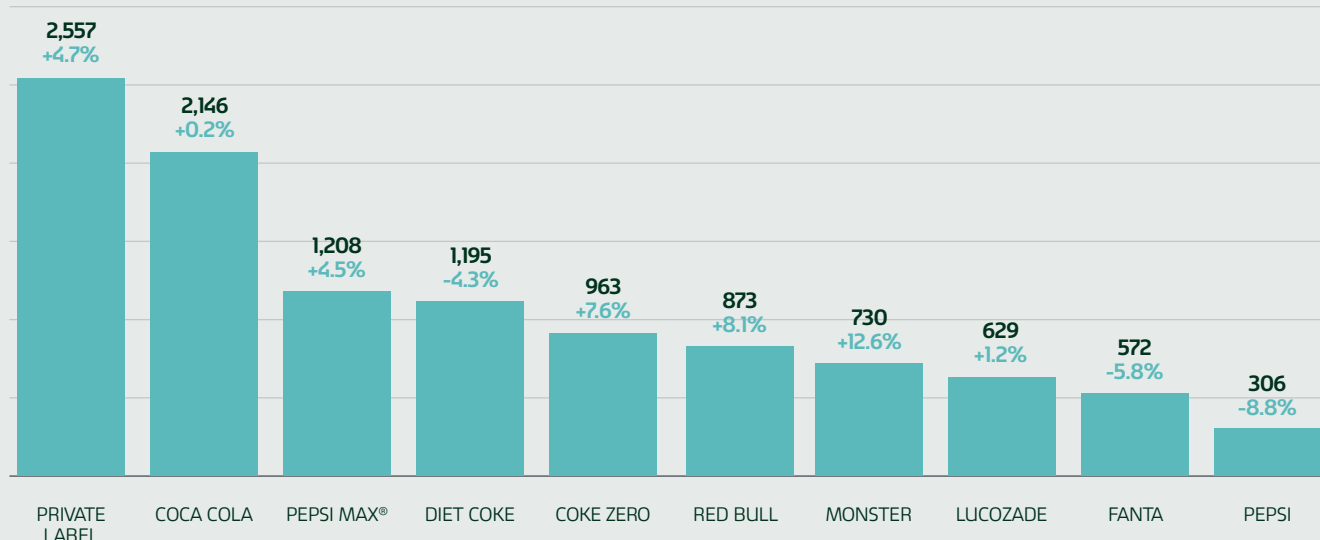
<sup>4</sup> NIQ & CGA BY NIQ – Grocery Multiples, Convenience & Impulse, Foodservice and Licensed venues – NIQ 52 w/e 28.12.24, CGA by NIQ 31.12.24

<sup>5</sup> NIQ & CGA BY NIQ – Grocery Multiples, Convenience & Impulse, Foodservice and Licensed venues – NIQ 52 w/e 28.12.24, CGA by NIQ 31.12.24 – Note: Grocery multiples convenience stores (e.g. Tesco Express, Sainsbury's Local, etc) are included as grocery multiples, not convenience & impulse, in this read of the market

## TOP 10 SOFT DRINKS OUT OF HOME (£M)<sup>4</sup>



## TOP 10 SOFT DRINKS BRANDS (£M)<sup>4</sup>



This growth is testament to soft drinks' relevance, and the ingenuity of the companies that make them. It's been achieved despite significant raw material, packaging and energy cost hikes – with notable increases for plastic,<sup>6</sup>

aluminium,<sup>7</sup> sugar<sup>8</sup> and fruit concentrates<sup>9</sup> – as well as the inevitable impact on demand of poor weather throughout last summer (the coolest since 2015).<sup>10</sup>

<sup>6</sup> <https://www.chemorbis.com/en/plastics-news/European-buyers-switch-to-virgin-PET-as-R-PET-Flakes-prices-soar-/2024/03/28/897269&isflashhaber=true#reportH>

<sup>7</sup> <https://packagingeurope.com/news/red-sea-shipping-disruptions-increasing-flexible-packaging-prices-says-fpe/11301.article#:~:text=On%20the%20other%20hand%2C%20prices,away%20in%20the%20near%20future.>

<sup>8</sup> <https://vespertool.com/news/white-sugar-prices-whats-next-for-2025/#:~:text=Since%20October%202024%2C%20European%20white,clear%20recovery%20from%20earlier%20declines.>

<sup>9</sup> <https://www.thegrocer.co.uk/kvi-price-tracker/orange-juice-prices-hike-as-demand-set-to-outstrip-supply-by-summer/688453.article>

<sup>10</sup> Met Office <https://www.metoffice.gov.uk/binaries/content/assets/metofficegovuk/pdf/weather/learn-about/uk-past-events/summaries/seasonal-assessment---summer24.pdf>

The sector's strong performance should also inspire some optimism as we head further into the uncertainty of 2025. Notwithstanding the impact of potential international trade tariffs,<sup>11</sup> businesses are facing ongoing labour and raw material shortages<sup>12</sup> – this year's Brazilian orange harvest is expected to hit a 37-year low<sup>13</sup> – as well as the cost burden of new regulations such as Extended Producer Responsibility (EPR). By focusing on what we do best, we can continue to grow.

Taking a longer term view of recent years gives further cause for cheer. In 2023, the overall soft drinks sector saw

value sales surge by 6.5%<sup>14</sup> on volumes that fell by 1.5%<sup>14</sup> as producers, retailers and out-of-home operators were forced to pass on the soaring costs they were experiencing. As inflation eased in 2024, we've been able to drive volume growth to deliver strong top line growth.

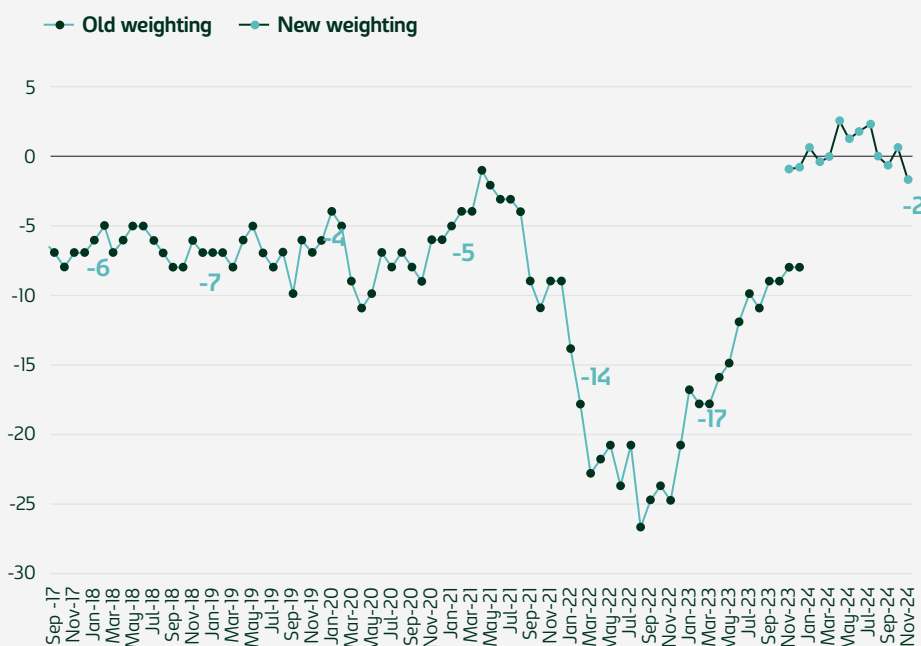
Not all change is unwelcome, of course. As we explored in the previous chapter, the implementation of the nationwide Deposit Return Scheme (DRS) in October 2027<sup>15</sup> will increase recycling rates, reduce littering and ensure greater availability of quality recycled PET plastic – all positives for planet and people.

## QUESTIONS OF CONFIDENCE

Consumer confidence levels have been on a rollercoaster in recent years as global shocks and events closer to home have made headlines and changed lives.<sup>16</sup> All this is affecting the beverages people are choosing to drink,

with health motivations tending to rise as confidence increases and demand for indulgent treats rising as it falls.<sup>17</sup> Therefore it's important drinks ranges meet a variety of consumer needs.

### IGD SHOPPER CONFIDENCE INDEX<sup>16</sup>



- Ongoing fears of higher living costs in future
- Retail demand low, poor Christmas trading
- Food retail volumes flat-lining
- Away-from-home volumes also weak
- But not all shoppers are in the same place
- Businesses need to be smart and agile
- There are still growth opportunities

<sup>11</sup> <https://www.theguardian.com/world/2025/apr/10/us-china-trade-war-intensifies-as-beijings-tariffs-come-into-effect-after-trump-pause>

<sup>12</sup> IGD Research Economic Viewpoint: Can UK food prosper in 2025

<sup>13</sup> <https://www.producereport.com/article/severe-drought-disease-drive-brazils-orange-harvest-37-year-low#:~:text=Forecasts%20from%20Brazil's%20citrus%20industry,lowest%20output%20since%201988%2F89>

<sup>14</sup> NielsenIQ - grocery, impulse & convenience and discounters 52 w/e 30.12.23 - combined with CGA by NielsenIQ - out-of-home 52 w/e 31.12.23

<sup>15</sup> <https://www.thegrocer.co.uk/news/supermarket-bosses-demand-2027-deposit-return-scheme-start-date-is-scrapped/699849.article>

<sup>16</sup> IGD ShopperVista – Minimum 1,000 nationally-representative British Shoppers each month 2024

<sup>17</sup> Lumina Intelligence Eating & Drinking Out Panel – data collected 52 w/e 10.07.22 and 52 w/e 07.07.24



So, there are still many reasons for cheer, both for soft drinks and the wider industry. There's evidence to suggest that – despite a dip in frequency of pub visits in the past year<sup>17</sup> – when people do go out, more are choosing to raise their glasses with premium drinks.<sup>18</sup>

Again, our sales figures back this up. Jimmy's Iced Coffee has achieved value growth of 191%<sup>19</sup> in the licensed and foodservice channels in the past year as more operators use the brand's range to satisfy growing demand for premium iced coffee. The Teisseire flavour syrups range has grown by 59%<sup>19</sup> in value in licensed and foodservice outlets as demand for a wider range of flavour experiences – in both hot and cold drinks – continues to grow.



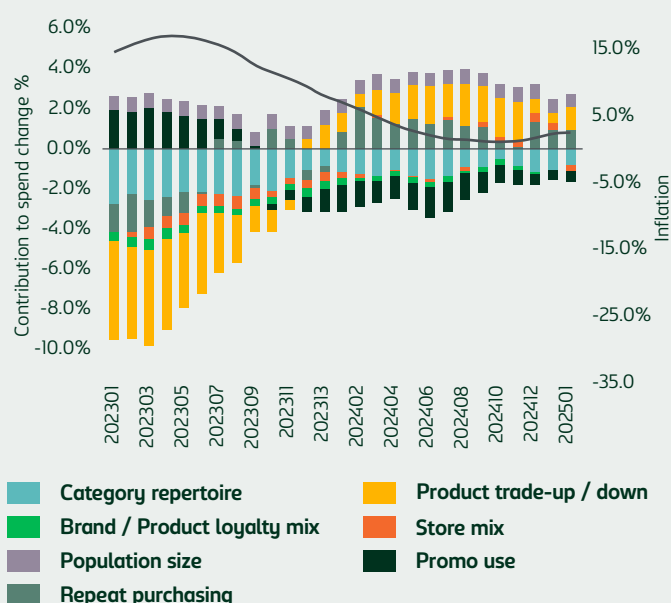
## LOYALTY

Shoppers are using loyalty cards and buying more on promotion to manage their finances more effectively. This means that inflation is no longer the greatest contributor to growth. Trading up to more premium food and drink and repeat purchasing are now the key driving factors behind this growth.<sup>20</sup>

### HOW ARE SHOPPERS TRYING TO MANAGE SPEND<sup>20</sup> (% OF SHOPPERS)



ATTITUDINAL SHIFTS TOWARDS FINANCES IS TRANSLATING INTO HOW WE SHOP, INFLATION IS NO LONGER THE MAIN CONTRIBUTOR TO GROWTH, **SHOPPERS ARE TRADING-UP PRODUCT MIX<sup>21</sup>**

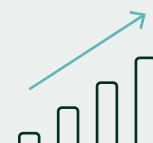


### GREATEST RETURN TO GROWTH



**Trade-Up**  
**+£411m**

Tweaks in product choice (e.g. changing brands, buying different pack sizes)



**Repeat Volumes**  
**+£336m**

Impact of buying more of the same kinds of products

<sup>18</sup> Kantar FMCG Panel Pressure Groups (01.12.24) and Coping strategies (12 w/e January 2025)

<sup>19</sup> CGA by NIQ, FS&L Database, Total OOH, Value Sales MAT vs YA 31.12.24

<sup>20</sup> Kantar Worldpanel – Panel Voice Survey – Pressure Groups Survey – Nov 2024 – 9,767 panellists interviewed

<sup>21</sup> Data for 12 w/e 26.01.25 – Kantar Purchase Panel Levers for growth analysis - Trended

Consumers' growing health consciousness is another big opportunity, both in grocery and the out-of-home channels. More people are moderating how much alcohol they drink, or cutting it out altogether, with 46%<sup>22</sup> of people in the UK now falling into the former camp (up from 36% in 2018<sup>22</sup>) and 17%<sup>22</sup> into the latter (up from 12% in 2018<sup>22</sup>). Given that switching to soft drinks is the second most popular way of cutting down on alcohol,<sup>22</sup> the growth opportunities are clear.

Indeed, 318 million soft drinks servings were consumed as an alternative to alcohol in UK homes in 2024,<sup>23</sup> a rise of 16 million (5.3%) versus five years ago.<sup>23</sup> Net switching from alcohol to soft drinks has delivered £51.2m growth<sup>24</sup> (£14.7m for low and no options<sup>24</sup>) in the past year. This is where premium soft drinks and low and no alcohol brands come into play.

Whereas previous generations' drinks repertoires were limited to a few staples, today's consumers are demanding a far wider range of drinks. Carlsberg Britvic is in a unique position in the UK to meet these demands, with everything from craft beer and mainstream lagers and low/no alcohol alternatives like Brooklyn Special Effects and 1664 Bière 0.0 through to mega brands like Pepsi MAX® and 7UP and drinks with functional benefits such as Purdey's.



## MODERATION NATION<sup>23</sup>



**Abstinence**  
**17%**  
(vs. 12% in 2018)



**Moderation**  
**46%**  
(vs. 36% in 2018)

### Methods of moderation

- #1 Drinking on fewer occasions
- #2 Drinking soft drinks
- #3 Having fewer drinks when drinking
- #4 Drinking no-low alcohol alternatives



<sup>22</sup> Kantar Worldpanel Division Alcovision Data to 30.09.24

<sup>23</sup> Kantar Worldpanel Division In Home & Carried Out Usage Panel 52 w/e 29.12.24 vs. five years ago

<sup>24</sup> Kantar Worldpanel Division FMCG Take Home 52 w/e 29.12.24



AS A RESULT, WE ARE SEEING SPEND SHIFT FROM  
**ALCOHOL INTO SOFT DRINKS, AS WELL AS NO & LOW<sup>23</sup>**

NET SWITCHING FROM ALCOHOL



**318m**

in-home soft drinks  
 servings consumed for  
 'alternative to alcohol'  
 in latest year

**+16m**

servings vs. 5YA



Share of  
 serves as 'an  
 alternative to  
 alcohol'

3.5

13.9

2020  
 2024

Great tasting drinks without the calories have become the norm for UK consumers – thanks partly to the success of drinks such as Pepsi MAX®, the UK's bestselling zero-sugar full-taste cola,<sup>25</sup> 7UP and Tango Sugar-Free and they continue to offer lucrative growth opportunities for retailers and out-of-home operators. But concepts of health are evolving, and new opportunities are arising from growing demand for drinks with functional health benefits and natural credentials.

Indeed, 35% of soft drinks shoppers are classed as 'health moderates',<sup>26</sup> meaning that they adopt some healthy diet and lifestyle practices, and a further 26% are health actives,<sup>26</sup> meaning that they adopt several of these practices. Collectively, these groups spend £96.7bn on FMCG a year,<sup>26</sup> a figure that dwarfs the £50.5bn<sup>26</sup> people who take a more relaxed approach to health and wellbeing spend. As we explore below, we expect consumer health consciousness to grow over the coming year.

This is why growing numbers of our partners are serving up products such as Plenish, health shots and plant-powered m\*lks alternatives, as well as Purdey's Natural Energy drinks and Aqua Libra natural still, sparkling and infused waters. It is also the inspiration behind our new Lipton Kombucha range, a trio of refreshing, lightly sparkling drinks with naturally fermented tea, available in Mango Passion fruit, Raspberry and Strawberry Mint flavours.



<sup>25</sup> NIQ & CGA BY NIQ – Grocery Multiples, Convenience & Impulse, Foodservice and Licensed venues – NIQ 52 w/e 28.12.24, CGA by NIQ 31.12.24

<sup>26</sup> Kantar Worldpanel Europanel, GfK – Who Cares? Who Does? Health Survey 2024 %GB



## HEALTHY GROWTH<sup>27</sup>

### TOTAL FMCG SHOPPERS



#### HEALTH ACTIVES

Adopt **numerous** diet and lifestyle practices

**£47.4bn**

Spend on FMCG

**2.1bn**

FMCG shopping trips



#### HEALTH PASSIVES

Do not adopt many diet and healthy lifestyle practices

**£50.5bn**

Spend on FMCG

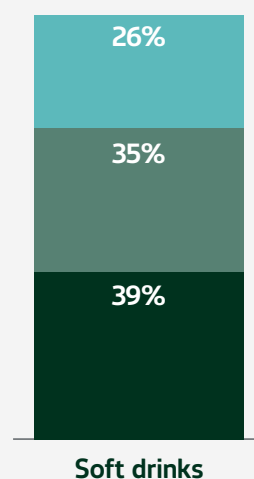
**2.1bn**

FMCG shopping trips

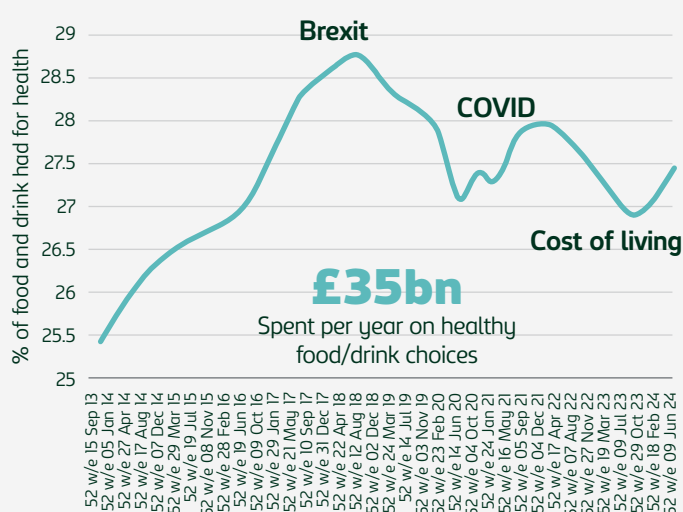
35% of soft drink shoppers try to adopt a healthy lifestyle, but with limited success

### % HOUSEHOLDS

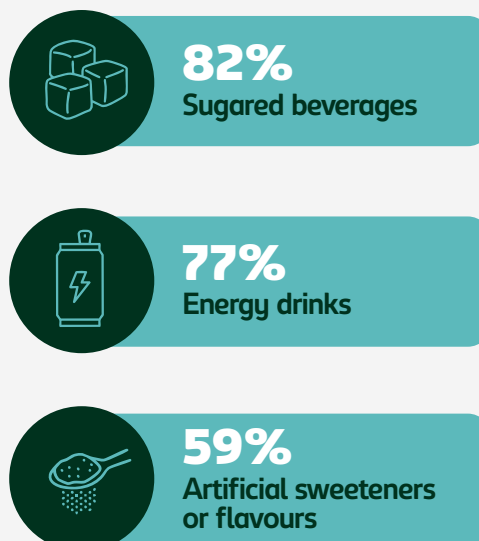
Health passives Health actives Health moderates



Despite this, health typically makes a resurgence after turbulent events slow down



% of Britain viewing as harmful



## DO THE KOMBUCHA CHA CHA WITH LIPTON'S LATEST LAUNCH

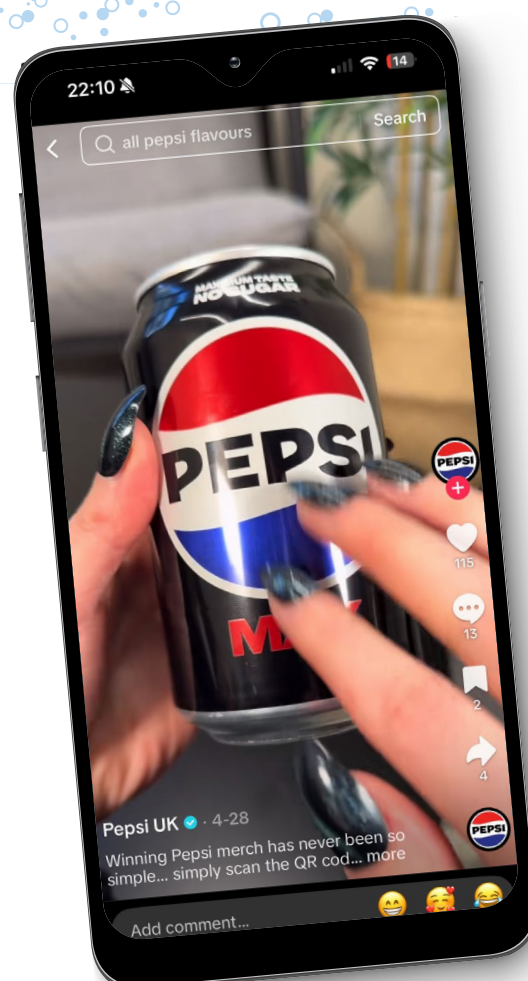
The UK is going crazy for kombucha, the fermented tea that can trace its origins back to Ancient China. Sales have surged by 39%<sup>28</sup> in the past five years and hit £33m in 2024.<sup>28</sup> Now Carlsberg Britvic is bringing kombucha – or 'booch' to aficionados – into the mainstream with the launch of three delicious Lipton Kombuchas.

Lipton, the tea experts, have blended delicately sparkling drinks with naturally fermented tea with three different flavour combinations – Mango Passionfruit, Raspberry and Strawberry Mint – to create these refreshing, naturally low sugar and calorie beverages. The drinks are already making a splash online, attracting 1.9m views and 50k interactions on TikTok when we launched in March. **Bish bash booch!**



It's not just the soft drinks that people are buying that are continuing to evolve. As we've seen, so too are the places people are choosing to buy them and consume them. Online channels continue to grow for soft drinks players, commanding 14.9% of value sales in 2024,<sup>29</sup> up from 13.8% in 2022.<sup>29</sup> Carlsberg Britvic, meanwhile, overtrades online, with 18.6%<sup>29</sup> of revenues coming from digital channels, up from 17.5% in 2022.<sup>29</sup>

The online retail landscape is changing, with specialist, pure play, quick commerce and DTC platforms all outgrowing traditional online retailers, both in terms of general FMCG and soft drinks sales. Social commerce is also a growing force online, with TikTok now the UK's sixth largest e-commerce platform,<sup>30</sup> despite it only setting up in late 2021. Pepsi, meanwhile, has become the top selling soft drink on TikTok Shop.<sup>30</sup>



28 Nielsen IQ RMS Total Coverage, Britvic Defined Kombucha universe, Value sales, 52w/e 21.12.24

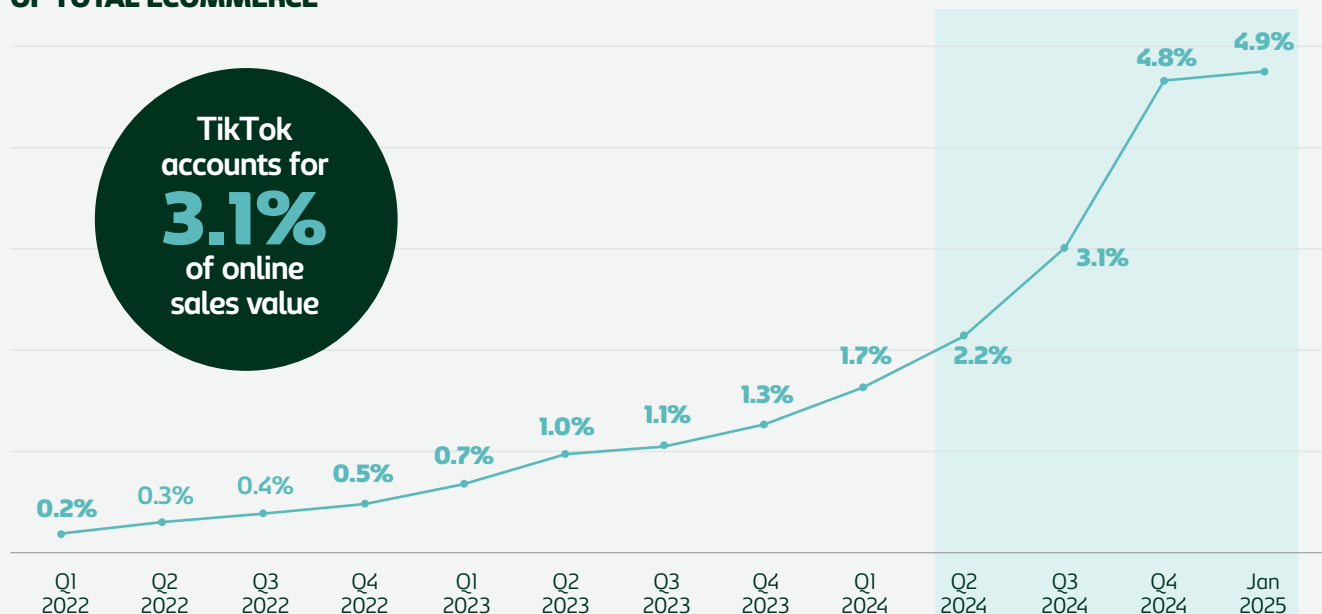
29 NIQ Omnisales – Data to 28.12.24

30 NIQ Digital Purchases – Total Ecom – Value Market Share – data from 01.01.22 to 26.01.25

## TOP ON TIKTOK

It's official: Pepsi MAX® is the top-selling soft drink on TikTok.<sup>31</sup> This has been achieved by working with PepsiCo digital partners to amplify our presence on the platform through native content, affiliate partnerships and live broadcasts. But it's not just Pepsi. We also sell Rockstar Energy®, Lipton, J2O, Tango and Aqua Libra on the platform.

### TIKTOK'S VALUE MARKET SHARE OF TOTAL ECOMMERCE<sup>31</sup>



## TikTok Shop

ISN'T JUST FOR  
**GEN Z**

	Value share	Penetration
Gen Z	21.5%	34.3%
Gen Y	36.0%	26.0%

**#11**

E-retailer in  
non-alcoholic  
beverages

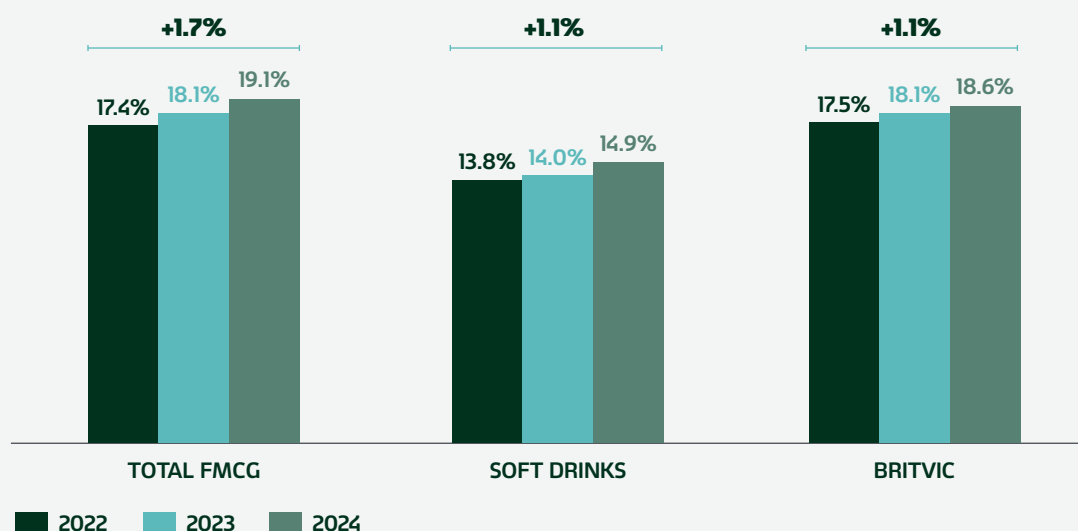


<sup>31</sup> NIQ Digital Purchases – Total Ecom – Value Market Share – data from 01.01.22 to 26.01.25

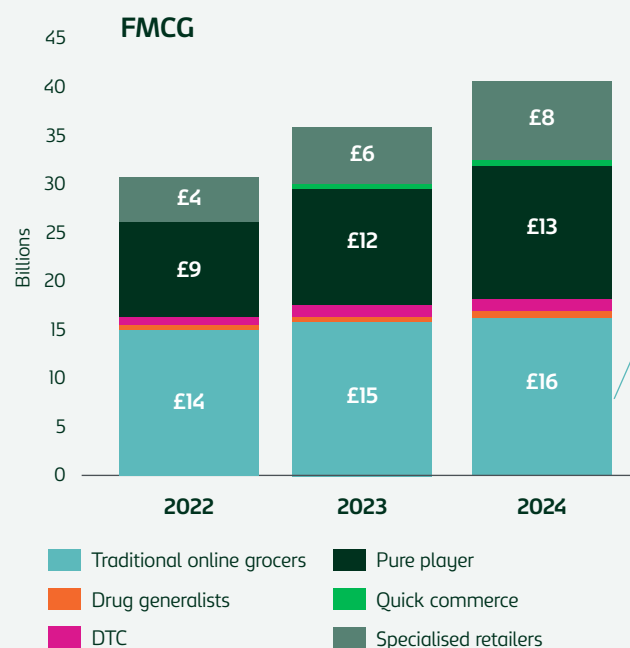


## HOW THE ONLINE LANDSCAPE IS CHANGING

ONLINE IS GROWING IMPORTANCE YOY  
ESPECIALLY FOR SOFT DRINKS<sup>32</sup>



TRADITIONAL ONLINE GROCERS, HOWEVER, ARE NOT  
GROWING AS FAST AS OTHER ONLINE CHANNELS<sup>32</sup>

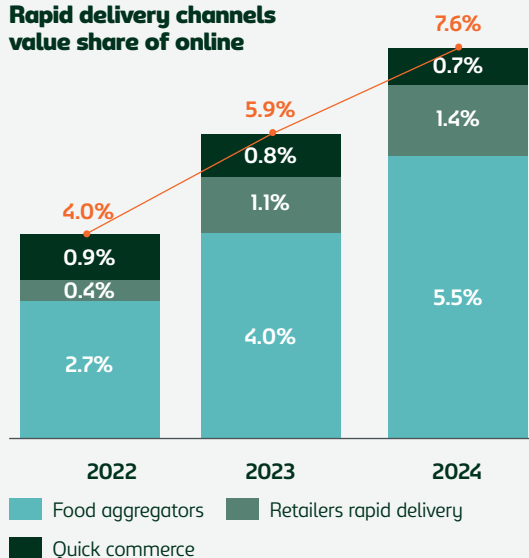


### Val % change

	FMCG	Soft drinks		TSD share of FMCG
Traditional online	+2.6%	+6.6%	+£88.1m	9.0%
Pure player	+14.1%	+20.4%	+£79.8m	3.5%
Quick commerce	+49.3%	+55.4%	+£24.3m	13.0%
Specialised retailers	+35.6%	+349.1%	+£40.1m	0.7%
Drug generalists	+18.1%	+15.4%	+£0.4m	0.5%
DTC	+9.1%	+37.0%	+£2.6m	0.8%

## RAPID DELIVERY CONTINUES TO EXPAND HELPING **ONLINE TAP INTO DIFFERENT MISSIONS**<sup>33</sup>

### Rapid delivery channels value share of online



## SOME RETAILERS HAVE EXPANDED TO OFFER **ULTRA FAST DELIVERY TO THEIR CUSTOMERS**

### Retailer rapid delivery



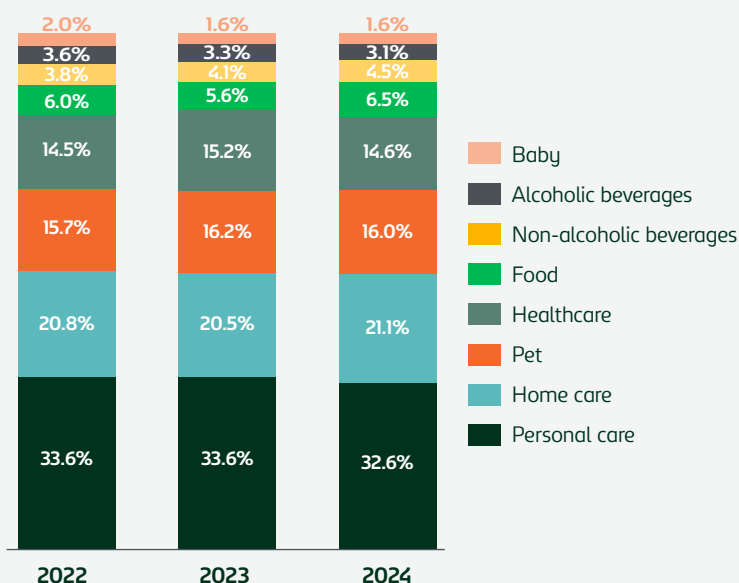
### Retailers through food aggregators



## AMAZON IS DEFINITELY WORTH THE **CONSIDERATION WITH LARGER PACKS**<sup>34</sup>

#1

Non-alcoholic beverages  
top grower vs 2YA



## TOP PRODUCTS **ON AMAZON**

**64%**  
Continue  
to growth



<sup>33</sup> NIQ digital purchases - FMCG - Full year, 2022, 2023, 2024 - Read as 'rapid delivery holds a 7.6% share of total online, of which food aggregators hold a 5.5% share'  
<sup>34</sup> NIQ Omnisales data to 28.12.24



As we've explored, the challenges the wider FMCG industry is facing are also presenting considerable opportunities for soft drinks. Realising these will rely on producers continuing to adapt their portfolios and balancing multiple and, at times, contradictory demands by offering exciting new flavour profiles, functional

health benefits, premium alcohol alternatives, indulgent treats and great value for money.

Read on to find out how we're doing this in the different channels we serve...



# 2024 IN NUMBERS

The convenience soft drinks category is now valued at

**£5.3bn**

growing by

**+3.6%**

adding

**£185.8m**

in 2024<sup>1</sup>

On-the-go soft drink value sales grew a healthy

**+4.1%**

in impulse outperforming take home value

**+2.7%**<sup>1</sup>

A staggering

**2.5bn litres**

(equivalent to

**991**

Olympic size swimming pools!)



were bought in convenience growing by

**+1.9%**<sup>1</sup>

while units remain broadly flat at

**-0.5%**<sup>3</sup>

with

**3.3bn<sup>3</sup>**

units sold in 2024 equating to

**105**

units bought per second<sup>3</sup>

The top three soft drink manufacturers have remained as

*Coca-Cola Enterprises*



**Red Bull**

**BRITVIC**

collectively delivering

**£124.3m<sup>1</sup>**

<sup>1</sup> Nielsen IQ, Total Convenience, Total Soft Drinks Britvic Defined, Value sales, 52WE 04/01/25

<sup>2</sup> Nielsen IQ, Total Convenience, Total Soft Drinks Britvic Defined, Volume sales, 52WE 04/01/25

<sup>3</sup> Nielsen IQ, Total Convenience, Total Soft Drinks Britvic Defined, Unit sales, 52WE 04/01/25

The top five soft drink segments in convenience are

- 1 Stimulants
- 2 Cola
- 3 Plain water
- 4 Flavoured carbonates
- 5 Juice drinks

adding  
**£184.4m**  
to the category  
in 2024<sup>1</sup>

Sugar free  
products grew  
**+5.5%**

and outperformed  
standard **+3.0%** in  
the market<sup>1</sup>

Innovation continued to play  
a strong role in piquing  
interest with

**21.7%**

of market value driven by  
new product development<sup>1</sup>



Pepsi grew  
faster versus  
Coca-Cola  
growing

**+3.0%**

versus  
**+0.7%**<sup>1</sup>



**MONSTER**

won the  
stimulant  
wars versus  
Red Bull, both  
posting strong  
growth in 2024  
with Monster  
pipping Red  
Bull to the post

**+13.9%**  
versus  
**+11.5%**<sup>1</sup>

# CONVENIENCE CATEGORY OVERVIEW

## SOFT DRINKS: THE CUTTING EDGE OF CONVENIENCE

Once again, soft drinks have proven their remarkable power in UK convenience retail. Sales have surged by 3.6% (or £185.8m) to £5.3bn.<sup>1</sup> Volumes have grown by 1.9%.<sup>2</sup> The UK's 49,000 convenience stores<sup>3</sup> sold a staggering 2.5bn litres of soft drinks in 2024,<sup>2</sup> enough to fill 991 Olympic-sized swimming pools!

This comes against a backdrop of ongoing growth for the wider convenience channel. With the financial pressures of recent years easing for many, increasing numbers of people have been visiting convenience stores more often, helping to drive 4.2% revenue growth to £49.4bn in 2024.<sup>3</sup> New

store openings (store numbers grew by 2.4%<sup>3</sup>) and innovative ranging (particularly in meal deals, hot food counters and brand partnerships) have played a key role in channel growth.<sup>3</sup>

Tectonic changes in ownership are also reshaping the convenience channel. Asda's £2bn acquisition of forecourt operator, EG Group in October 2023<sup>4</sup> – as well as its £600m purchase of 129 forecourts from the Co-op a year earlier<sup>5</sup> – has seen around 500 stores previously operating under the EG, Spar and Co-op converted to the Asda Express brand so far.<sup>4</sup>

<sup>1</sup> Nielsen IQ, Total Convenience, Total Soft Drinks Britvic Defined, Value sales, 52WE 04.01.25 Note: Convenience is defined as stores which are less than 3000sqft. This definition will differ to that cited in the Category Overview as it will include grocery convenience stores, symbols, independents, forecourts and convenience multiples which meet that criteria.

<sup>2</sup> Nielsen IQ, Total Convenience, Total Soft Drinks Britvic Defined, Volume sales, 52WE 04.01.25

<sup>3</sup> Lumina Intelligence Market Sizing Insight & Analysis, June 2024

<sup>4</sup> <https://www.thegrocer.co.uk/news/asda-to-convert-acquired-eg-group-forecourts-to-asda-express-by-next-summer/685166.article>

<sup>5</sup> <https://www.bbc.co.uk/news/business-62735141>







## HOW TANGO IS HAVING A BLAST IN CONVENIENCE

With the fight for share of grocery retail getting ever fiercer, channel-exclusive limited-edition soft drinks are helping to give convenience retailers the edge. Look no further than the sales figures for Tango's 2024 limited-edition drops in convenience for proof.

Tango's limited-edition Raspberry Blast and Cherry Blast lines landed in convenience store chillers in April 2024 and caused quite the stir. By the end of the year, the two products had achieved combined sales worth £3.7m.<sup>6</sup> That makes Raspberry Blast and Cherry Blast the second and third bestselling fruit carbonate

launches of 2024, respectively, with sales of £1.9m<sup>6</sup> and £1.8m.<sup>6</sup>

And the first? That's Tango Editions Mango, which racked up £3.6m<sup>6</sup> during the limited time it was available in convenience. In fact Tango Mango proved so popular it is now a permanent part of the Tango core range. Retailers that missed out on the Blast lines last year needn't worry. This April, the raspberry and cherry-flavoured drinks returned to UK convenience stores for another six months by popular demand. Talk about having a blast!

**RASPBERRY BLAST**  
£1.9M



**TANGO MANGO**  
£3.6M



**CHERRY BLAST**  
£1.8M



2

1

3

6

<sup>6</sup> Nielsen IQ, Total Convenience, Total Soft Drinks Britvic Defined, Value sales, 52WE 04.01.25



## CONVENIENCE CHANNEL BY CHANNEL<sup>7</sup>

### CONVENIENCE MARKET VALUE 2024F

£49.4bn (+4.2%) and outlets: 49,538 (+2.4%)

Unaffiliated independents	Symbol groups	Convenience multiples	Co-operatives	Forecourts
£8.8bn +2.6%	£18.8bn +5.1%	£10.1bn +5.0%	£7.0bn +4.4%	£4.8bn +2.3%
18,404 +0.3%	17,685 +5.2%	5,299 +3.6%	3,411 +1.8%	4,740 -0.5%

Growth in convenience drives growth for soft drinks and vice-versa. But the power of pop goes beyond pounds, pence and litres sold. The promise of cool, refreshing soft drinks pulls more people into convenience stores than any other type of food or drink.<sup>8</sup> Retailers say 20% of their footfall comes from people looking for soft drinks, compared to 15% for confectionery, 14% for alcohol and 11% for tobacco.<sup>7</sup> They also say that soft drinks account for more of their annual profit and revenues than any other category.<sup>7</sup>

Attracting soft drinks shoppers into stores is therefore crucial for retailers. That's because, on average, they are more valuable. Compared to the average shopper, they spend more, (£8.99 vs. £8.53),<sup>9</sup> buy more items (3.3 per trip versus 2.7)<sup>9</sup> and visit stores more frequently (3 times a week versus an average of 2.7).<sup>9</sup> Nearly one in four (23.4%) visits to convenience stores result in the sale of soft drinks.<sup>10</sup> That's more than bread, biscuits, crisps and confectionery.<sup>10</sup>

As we explore in the next chapter, having the right drinks at the right spots in stores, as well as using savvy in-store marketing and promotions, delivers big rewards for retailers. To maximise the opportunity, it's worth

considering people's key reasons for visiting convenience stores and how they are changing.

Top up shops, for example, represent 35.7%<sup>11</sup> of convenience shopping missions (up 1.7% ppts year-on-year)<sup>11</sup> so placing soft drinks in secondary sitings to drive impulse sales can pay dividends for retailers. The two next most important reasons for visiting stores are for food-to-go (up 0.3% ppts to 18.7% of missions)<sup>11</sup> and for treats (up 0.3% ppts to 12.5%).<sup>11</sup> Retailers should link deals with meal items and snacks to drive up spend.



<sup>7</sup> Lumina Intelligence Market Sizing Insight & Analysis, June 2024

<sup>8</sup> Lumina Intelligence Retailer Attitudes & Behaviours Study, July 2024

<sup>9</sup> Lumina Intelligence Convenience Tracking Programme, Soft Drinks, MAT 05.01.25 vs. YA

<sup>10</sup> Lumina Intelligence Convenience Tracking Programme MAT 05.01.2025 vs. YA

<sup>11</sup> Lumina Intelligence Convenience Tracking Programme, Total Soft Drinks, MAT 05.01.25 vs. YA

## POP POWER: THE YEAR IN NUMBERS<sup>12</sup>



# 105

soft drinks sold  
per second

Worth  
**£5.3bn**  
**+3.6%**

**2.5bn**  
litres sold  
**+1.9%**

**3.3bn**  
units sold  
**-0.5%**

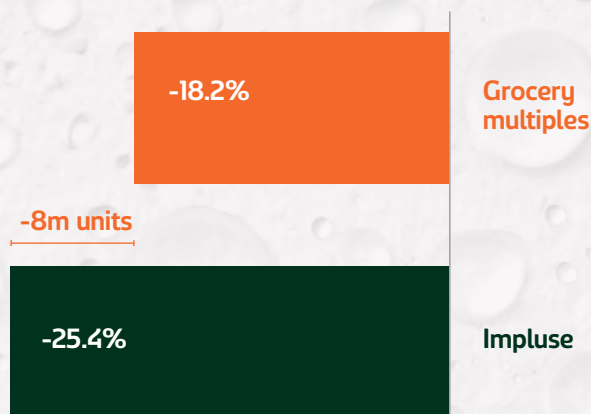
## HOW SUNSHINE AFFECTS SOFT DRINKS SALES

It won't be a surprise to anyone that when the sun shines and the mercury rises, soft drinks sales rise too. Alas, the converse is also true. With the summer of 2024 the coolest the UK has seen since 2015,<sup>13</sup> convenience retailers sold 28 million fewer soft drinks during the summer months compared to the previous year.<sup>14</sup>

**-28m**

soft drinks units vs YA in impulse

### SOFT DRINKS UNITS CHANGE VS YA DURING LAPSED HEATWAVE WEEKS



## HEATWAVE IN 2023 NOT REPLICATED IN 2024

**2024** UK experiences the coolest  
summer since 2015



<sup>12</sup> Nielsen IQ, Total Convenience, Total Soft Drinks Britvic Defined, Value sales, 52WE 04.01.25

<sup>13</sup> Met Office - <https://www.metoffice.gov.uk/about-us/news-and-media/media-centre/weather-and-climate-news/2024/uk-experiences-coolest-summer-since-2015>

<sup>14</sup> Nielsen Scantrack 52 w/e 28.12.25 Lapsed heatwave weeks | 2023 (w/e 17.06.23 versus w/e 15.06.24 and w/e 09/09.23 versus 07.09.24)



## WHY SOFT DRINKS ARE IN THE PINK<sup>15</sup>

It pays to attract soft drinks shoppers into outlets. Not only do they spend more than the average shopper, they also drop by more frequently and buy more items when they do.<sup>15</sup>



**AVERAGE SHOPPER<sup>16</sup>**

<b>65.2%</b>	Average penetration current 52we	<b>15.3%</b>
<b>+6.7pp</b>	Penetration growth 52we vs LY	<b>0.0pp</b>
<b>£8.53</b>	Spend 52we	<b>£8.99</b>
<b>-9.0%</b>	Spend growth 52we	<b>-2.8%</b>
<b>2.77</b>	Basket size 52we	<b>3.30</b>
<b>-9.0%</b>	Basket size growth 52we vs LY	<b>-6.1%</b>
<b>2.79</b>	Frequency	<b>3.01</b>
<b>+1.0</b>	Frequency growth 52we vs LY	<b>+2.0%</b>



**SOFT DRINK SHOPPER<sup>16</sup>**

## SOFT DRINKS FEATURE IN ALMOST ONE IN FOUR CONVENIENCE SHOPPING BASKETS

Soft drinks is the leading drinks and impulse category in a convenience shopper's basket, featuring in almost 1 in 4 baskets in 2024. **That's even more than bread!**

### TOP 5 CATEGORIES IN A CONVENIENCE STORE BASKET<sup>17</sup>

Chilled foods	29.8%
<b>Soft drinks</b>	<b>23.4%</b>
Bread	22.5%
Crisps & snacks	17.2%
Chilled dairy & alternatives	12%

### SOFT DRINKS VS IMPULSE<sup>17</sup>

<b>Soft drinks</b>	<b>23.4%</b>
Crisps & snacks	17.2%
Confectionery	10.9%
Biscuits & bars	9.4%

### SOFT DRINKS VS DRINKS<sup>17</sup>

<b>Soft drinks</b>	<b>23.4%</b>
Alcohol	9.7%
Hot drinks	3.2%

<sup>15</sup> Lumina Intelligence Market Sizing Insight & Analysis, June 2024

<sup>16</sup> Lumina Intelligence Convenience Tracking Programme, Convenience, MAT 05.01.25 vs. YA

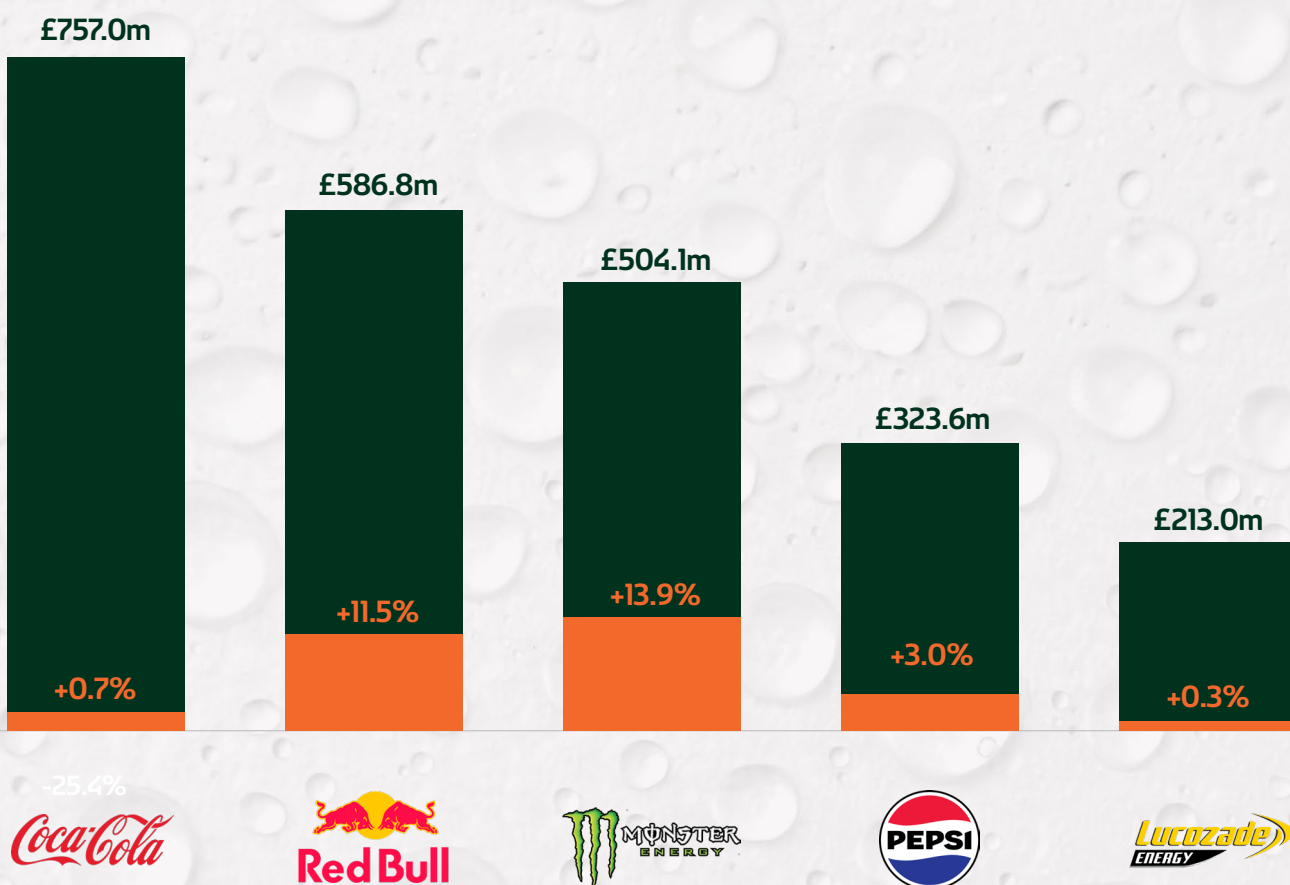
<sup>17</sup> Lumina Intelligence Convenience Tracking Programme, MAT 05.01.25 vs. YA

A laser focus on soft drinks ranging is vital. Because many shoppers will simply move on to the next shop if they can't find the Pepsi MAX® or 7UP they're craving when thirst strikes, retailers must ensure they're keeping a well-stocked range in their chillers. After all, the top five bestselling soft drinks brands (Coca-Cola, Red Bull, Monster, Pepsi and Lucozade) contributed nearly £2.4bn<sup>18</sup> in revenue for convenience retailers in 2024 and delivered growth worth £137.4m.<sup>40</sup>

The dominance of the big five brands reflects the popularity of stimulant energy drinks and cola in convenience; these are the channel's biggest soft drink types in terms of revenue with sales of more than £1.2bn and £1.1bn respectively.<sup>18</sup> But it's also worth noting that drinks choices are diversifying, driving strong growth in flavoured water and dairy drinks and a sharp decline in sports drinks following the collapse in sales of Prime Hydration. Prime declined by -£70m across its sports and energy ranges.<sup>19</sup>

## THE FANTASTIC FIVE<sup>18</sup>

The convenience channel's five bestselling soft drinks brands (Coca-Cola, Red Bull, Monster, Pepsi and Lucozade Energy) delivered almost £2.4bn in sales in 2024.<sup>18</sup> That's why it's critical to keep a strong (and well chilled!) core to retail ranges.



<sup>18</sup> Nielsen IQ, Total Convenience, Total Soft Drinks Britvic Defined, Value sales, 52WE 04.01.25

<sup>19</sup> Nielsen IQ, Total Convenience, Prime Sports & Energy, Britvic Defined, Value sales, 52WE 04.01.25





## SOFT DRINKS IN CONVENIENCE: SECTOR BY SECTOR<sup>18</sup>

Soft drinks are diversifying. The big three soft drinks categories – stimulant energy drinks, cola and fruit flavoured carbonates – put more than £2.9bn through convenience retailers' tills last year, but with shoppers demanding a wider range of drinks at different times of the day, categories such as bottled water (plain and flavoured), dairy drinks and RTD coffees are in strong growth.

Stimulant drinks	£1246m	+9.1%
Cola	£1093m	+1.4%
Flavoured carbonates	£568m	+2.0%
Plain water	£567m	+11.3%
Juice drinks	£275m	-1.1%
Pure juice	£267m	+5.5%
Glucose drinks	£223m	-1.0%
Dairy / dairy substitutes	£210m	+13.0%
Sports drinks	£205m	-21.2%
RTD coffee	£154m	+12.4%
Flavoured water	£135m	+5.7%
Smoothies	£98m	+6.5%
Squashes	£75m	-3.6%
Lemonade	£52m	-5.9%
RTD tea	£50m	+3.7%
Mixers	£28m	-7.4%
Functional water	£28m	-1.7%

## COMPLETELY TANGO'D<sup>20</sup>

Tango has turned in a sparkling performance in the past year, with growth of 12.8% to £33.5m<sup>20</sup> fuelling market share gains from rival, Fanta. New product development such as Tango Editions Mango and the Tango Blast drinks have played a key role in this, but so too have core drinks such as the Tango Orange and Tango Apple Sugar Free lines.

**TANGO**  
**£33.5m**  
**+12.8%**<sup>20</sup>

**FANTA**  
**£150.5m**  
**-4.6%**<sup>20</sup>



**PEPSI**  
**£323.6m**  
**+3.0%**

**COKE**  
**£757.0m**  
**+0.7%**

## PEPSI MAXING GROWTH<sup>20</sup>

Pepsi MAX<sup>®</sup> has continued to win share from rival Coca-Cola over the past year, thanks to strong sales of maximum taste, zero sugar cola, Pepsi MAX<sup>®</sup> and the brand's flavoured variants Pepsi MAX<sup>®</sup> Cherry, Lime and Mango. Pepsi Electric, the UK's first blue cola, also contributed to the brand's increased market share with sales hitting £2.8m last year.<sup>20</sup>

## SINGLE SERVES FLY<sup>20</sup>

People are on the move more.<sup>21</sup> That means they're buying more soft drinks on the hoof to keep them hydrated and refreshed. Hence the stronger growth in single serve soft drinks formats in convenience stores over the past year.

**SINGLE SERVE**  
**£3.6bn**  
**+4.1%**

**TAKE HOME**  
**£1.7bn**  
**+2.7%**<sup>20</sup>



<sup>20</sup> Nielsen IQ, Total Convenience, Total Soft Drinks Britvic Defined, Value sales, 52WE 04.01.25

<sup>21</sup> Centre for Cities - <https://www.centreforcities.org/blog/hybrid-working-in-global-cities-how-does-londons-return-to-the-office-compare/>



Attention should also be paid to choice of format, of course. Reflecting growing sales of food and drink to go through convenience stores,<sup>22</sup> soft drinks in single-serve formats delivered the strongest growth in 2024, increasing by 4.1% to hit revenues of more than £3.6bn.<sup>20</sup> Still, it's important not to overlook drinks in take-home formats, which grew by 2.7% to nearly £1.7bn (31.7% of total soft drinks sales).<sup>20</sup>

Slower growth in sales of take-home formats in convenience reflects stiffening competition throughout

the retail landscape. Promotional levels hit an all-time high in 2024,<sup>23</sup> with 26.6% of FMCG sales through the grocery multiples made on deal during the final four weeks of 2024<sup>23</sup> (up 0.3% pts on the previous high of 26.3% in December 2023<sup>24</sup>). Average share of sales on promotions stood at 24.7% for the full year,<sup>23</sup> compared to 2023's 23.1% average.<sup>24</sup> Deals played a key role in driving soft drinks volume growth, which peaked at 4.7% last spring,<sup>25</sup> throughout 2024.<sup>25</sup>



22 Lumina Intelligence Market Sizing Insight & Analysis, June 2024

23 NIQ Homescan FMCG Multiples (including Discounters), 52 w/e 28.12.24

24 NIQ Homescan FMCG Multiples (including Discounters), 4 w/e 30.12.23

25 NIQ Homescan Panel on Demand & Scantrack | Total Multiples Rolling 12 weeks 12 w/e 18.05.24



The deal mechanic of choice increasingly favoured by retailers is loyalty card discounts. It's easy to see why: 60%<sup>26</sup> of shoppers say loyalty card discounts are the mechanic most likely to encourage them to buy a product, second only to straight discounts (favoured by 79% of shoppers<sup>26</sup>). Loyalty schemes do 'what they say on the tin' - two thirds (66%<sup>26</sup>) of shoppers said that loyalty schemes made them more loyal to particular retailers in 2024, up from 62% in the previous year.<sup>26</sup>

This is helping to drive strong growth in sales of soft drinks through convenience stores owned by grocery multiples, such as Tesco Express, Co-op and Sainsbury's Local, which have grown by 7.6% in value terms.<sup>27</sup> Symbol group and independent retailers can compete by luring shoppers into their stores with convenience exclusive soft drinks such as Tango Raspberry and Cherry Blast, which have made a return this year after hitting sales of £3.7m in 2024.<sup>28</sup>



The grocery multiples' convenience stores saw the steepest growth in sales of soft drinks in 2024,<sup>28</sup> thanks to increased store numbers, shoppers becoming more reliant on loyalty cards to bag deals<sup>26</sup> and big retail groups capitalising on their competitive advantage by lowering prices. In November, Tesco cut prices

throughout its Express estate<sup>29</sup> and Sainsbury's rolled its Aldi Price Match scheme into its local stores.<sup>30</sup> Sales of soft drinks through forecourts, meanwhile, declined by 10.5%<sup>28</sup> (the only sub channel to see sales decline), while traditional symbol group and independent retailers mustered growth of 1.7%.<sup>28</sup>

SUB CHANNEL SOFT DRINKS PERFORMANCE<sup>28</sup>

Sales Value % Chg YA

Convenience	Symbols & independents	Grocery convenience	Multiple forecourts	Convenience multiples
3.6 ↑	1.7 ↑	7.6 ↑	-10.5 ↓	5.0 ↑

26 NIQ SOTN November '24

27 Nielsen IQ, Total Convenience formats of Traditional Grocers, Total Soft Drinks Britvic Defined, Value sales, 52WE 04.01.25

28 Nielsen IQ, Total Convenience, Total Soft Drinks Britvic Defined, Value sales, 52WE 04.01.25

29 <https://www.thegrocer.co.uk/news/tesco-rolls-out-price-cuts-in-express-convenience-stores/698122.article#:~:text=Tesco%20said%20the%20cuts%20to,supermarket%20player%20to%20do%20so.>

30 <https://www.thegrocer.co.uk/comment-and-opinion/sainsburys-aldi-price-match-convenience-store-move-is-smart/697411.article>



As a business, we're helping all our partners in convenience not just survive but thrive in this fast-changing environment. We've already explored how convenience-exclusive limited editions such as our Tango Blast duo, as well as exciting new twists on classics like Jimmy's Iced Coffee Donut and Cinnamon Roll variants, are helping to give our partners the edge.

Other examples of how we're helping our partners compete include our new price-marked two-litre formats of Pepsi – bottles of Pepsi MAX® (including Pepsi MAX® Cherry, Lime and Mango) have been reduced from £2.29 to £1.99 and Pepsi regular is down from £2.59 to £2.29 – and 750ml price-marked packs of Robinsons, which offer savvy shoppers an extra 33% of squash free for just £1.59.

Details of all our campaigns can be found on our online hub for convenience retailers, At Your Convenience, where you can find details about upcoming promotions, such as our Pepsi and Doritos snack deals and the Rockstar Energy® Live Nation tie-up with music festivals across the UK. Plus, a wide range of tips and advice on everything from merchandising and in-store marketing to ranging.

As we'll explore in detail in the next chapter, health consciousness is also having a growing influence on shoppers' soft drinks choices. This is reflected in the greater share of total sales sugar-free soft drinks have won,<sup>28</sup> as well as the double-digit gains made by flavoured water.<sup>28</sup> We can also look to the strong growth achieved by functional health brands for further proof of this, with brands like Plenish knocking it out of the park.<sup>28</sup>



While keeping a strong core is important, so too is ensuring retailers continue to excite shoppers with new products. Innovations such as exciting new flavours like Pepsi Electric and Coke Lemon which help make soft drinks one of the most vibrant categories in FMCG and delivered growth worth £123.3m (2.3% of the category's overall sales and 21.7% of the category's overall growth) in 2024.<sup>28</sup>



New product development serves two key purposes from a business perspective: brand extensions into new flavours and formats in scale categories drive excitement and trial, while the development of propositions that address new consumer needs, such as demand for functional health benefits or natural products, can birth entirely new categories. Of course, both can drive significant incremental sales opportunities too.



Take Tango, the only fruit carbonate brand to have made the top 20 new product launches list in 2024.<sup>31</sup> Tango Editions Sugar Free Mango and the Tango Limited Drops Cherry Blast and Raspberry Blast racked up sales worth £7.2m<sup>31</sup> in sales between them last year, while Pepsi Electric, the UK’s first blue cola, delivered an additional £2.8m.<sup>31</sup> New products also help draw shoppers into stores and provide valuable opportunities for growth for retailers.



THE TOP 20 SOFT DRINKS  
LAUNCHES OF 2024<sup>31</sup>

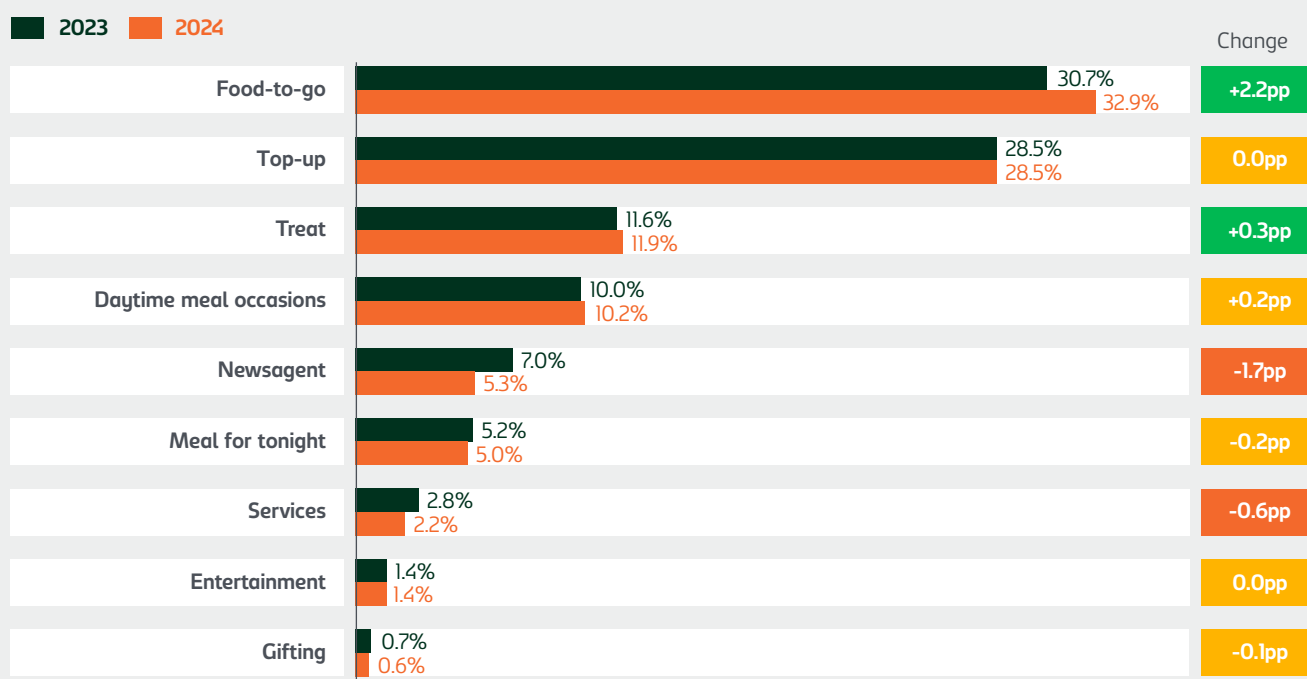
Category	Brand	Flavour	Sales Value £m's
Stimulant drinks	Monster Juiced	Bad Apple	10.79
Sports drinks	Lucozade Sport	Blue Force	9.09
Glucose drinks	Lucozade Energy	Blue Burst	6.97
Cola	Coca-Cola Zero	Lemon Cola	6.23
Cola	Coca-Cola	Lemon Cola	6.00
Stimulant drinks	Red Bull The Pink Edition Sugar Free	Forest Fruits	5.61
Juice drinks	Oasis	Summer Fruits	3.79
Fruit carbonates	Tango Editions Sugar Free	Mango	3.58
Stimulant drinks	Red Bull The Green Edition	Curuba & Elderflower	3.10
Stimulant drinks	Red Bull The Blue Edition	Juneberry	2.98
Cola	Pepsi Electric Zero Sugar	Cola With Citrus	2.82
Stimulant drinks	Lucozade Alert	Blue Rush	2.35
Stimulant drinks	Red Bull The Winter Edition	Vanilla & Berry	2.22
Stimulant drinks	Monster Energy Reserve	Orange Dreamsicle	2.12
Sports drinks	Prime Hydration	Cherry	1.96
Fruit carbonates	Tango Limited Drop	Raspberry Blast	1.91
Cola	Coca-Cola Zero	Oreo Cola	1.87
Fruit carbonates	Tango Limited Drop	Cherry Blast	1.76
Plain water	Ursu	Original	1.65
Sports drinks	Prime Hydration	Strawberry Lemonade	1.59

31 Nielsen IQ, Total Convenience, Total Soft Drinks Britvic Defined, Value sales, 52WE 04.01.25



## FOOD-TO-GO MISSIONS ON THE UP<sup>32</sup>

Soft drinks play an important role in every shopper mission, as the below graphic shows. Exciting drinks ranges, attractive promotions and eye-catching merchandising are encouraging shoppers to pick up more soft drinks in convenience stores. Particularly when it comes to food-to-go, treat and daytime meal shopping occasions, which have all grown share of soft drinks sales.



So, while challenges and change continue to reshape convenience retail, huge opportunities still exist for operators in this channel. Forecasts suggest that convenience will achieve the fastest growth of any grocery retail channel in the next four years with total sales growing by £10.7bn by 2029.<sup>33</sup> As the most bought impulse category in convenience (playing a key role in every shopper mission – see above), soft drinks have a key role to play in driving this growth.

As we've seen, soft drinks already overtrade in food-to-go and daytime meal occasion missions<sup>32</sup> but there is an opportunity to elevate presence in 'top up',

'entertainment' and 'meal for tonight' through cross category 'meal for tonight' bundles and leveraging visibility at key seasons events as well as utilising online platforms where soft drinks overtrade (36.4% online shoppers are on top up missions – this rises to 40.1% for soft drinks online shoppers).<sup>32</sup>

To find out how to turn those opportunities into sales, we've developed a seven-step plan for convenience retailers. Read on to discover how following these steps can **unlock an estimated £225m<sup>34</sup> sales opportunity over the next three years and deliver growth of £5k per store.<sup>34</sup>**

<sup>32</sup> Lumina Intelligence, Total CTP, 05.01.25 vs YA

<sup>33</sup> IDG Research, IGD mid-growth scenario (June2024)

<sup>34</sup> Quantic Britvic Driver Quantification 2023; 2028 Forecast of £1.1BN- Convenience Fare Share of the Retail Opportunity (£678m) apportioned across 49k stores.

# CONVENIENCE DEEP DIVE

## SEVEN STEPS TO £225M<sup>1</sup> GROWTH

As we explored in the previous chapter, convenience retail is undergoing huge structural changes, and soft drinks remain foundational for the success of the channel. They're bought on almost one in four (23.4%)<sup>2</sup> shopping trips in convenience stores and responsible for £5.3bn in sales.<sup>3</sup> But as shopper preferences evolve and a new generation of consumers comes to the fore, new opportunities for growth are presenting themselves. To realise these opportunities,

retailers need a solid plan. That's why we've developed a seven-step strategy for retailers who want to meet the growing demands of soft drinks consumers – roughly defined as the need for a widening range of drinks that can both fuel and hydrate, as well as provide health and wellbeing benefits, elevated experiences and opportunities for social interaction – in 2025 and beyond.

The prize is certainly worth striving for. We calculate that

by following our seven steps to success, the convenience channel can drive soft drinks sales growth worth a staggering £225m.<sup>1</sup> That equates to roughly £5k per store.<sup>1</sup> Read on to find out more.

<sup>1</sup> Quantic Britvic Driver Quantification 2023; 2028 Forecast of £1.1BN- Convenience Fare Share of the Retail Opportunity (£678m) apportioned across 49k stores

<sup>2</sup> Lumina Intelligence Convenience Tracking Programme, MAT 05.01.25 vs. YA

<sup>3</sup> Nielsen IQ, Total Convenience, Total Soft Drinks Britvic Defined, Value sales, 52WE 04.01.25

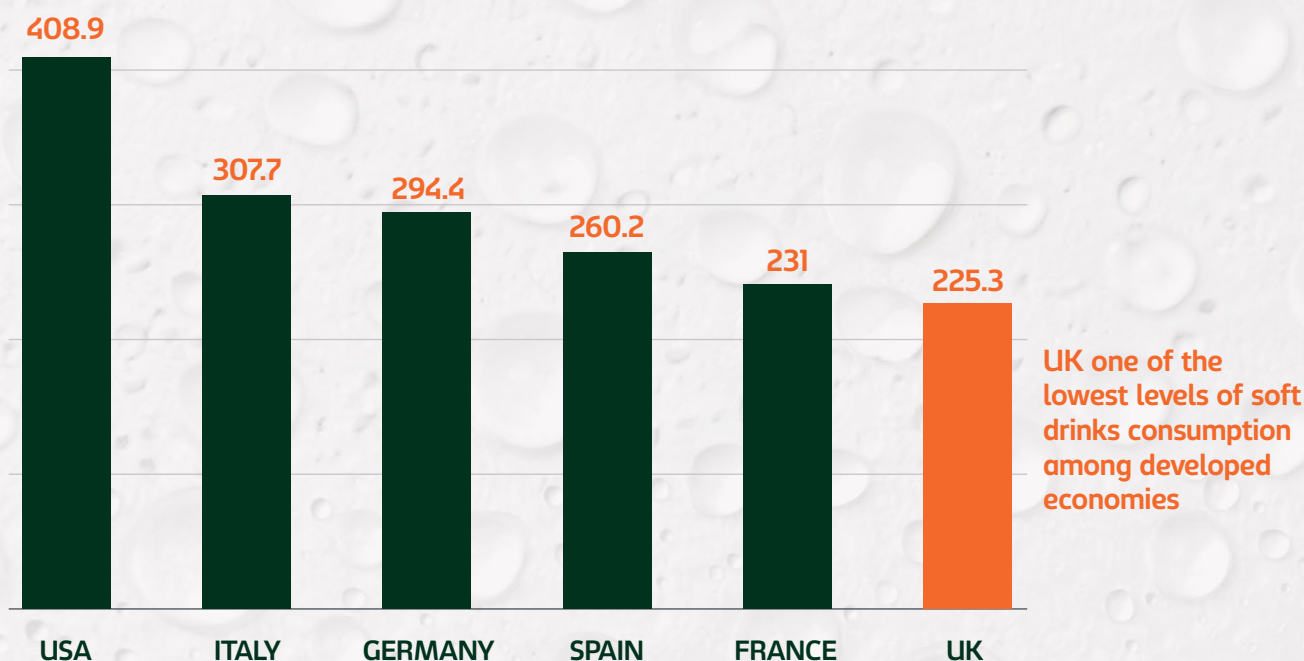






## GROWTH OPPORTUNITIES

Soft drinks have been a key growth driver for convenience and the wider grocery channel in recent years.<sup>4</sup> It's not over yet. Analysis of per capita consumption of soft drinks in other countries<sup>5</sup> suggests the category has plenty more juice in the tank in the UK. The average Brit drinks 225.3 litres of soft drinks a year.<sup>5</sup> That's less than the consumption levels in France, Spain, Germany and Italy, and nearly half the amount consumed in the US.<sup>5</sup>



<sup>4</sup> Nielsen IQ, Total Convenience, Total Soft Drinks Britvic Defined, Value sales, 52WE 04.01.25

<sup>5</sup> GlobalData, Total Country, Soft Drinks, Litres, 2023 (data pulled 2.8.24) + cross tabulated with population data for each country World Bank population for USA, France, Italy, Germany, Spain, UK 2023



# STEP ONE FUEL FUEL FURTHER

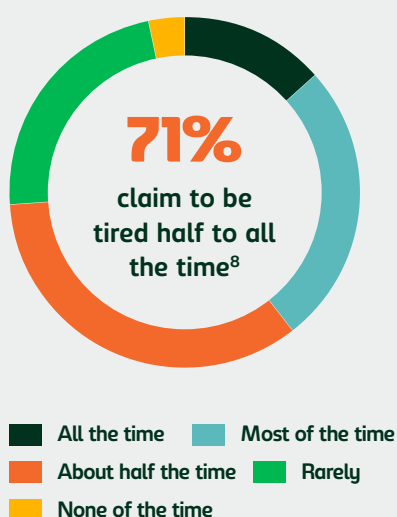
The clue is in the name: the success of the nearly 50,000 convenience stores operating in the UK today<sup>6</sup> relies on them being able to provide what shoppers are looking for quickly, easily and conveniently. Often what people want from convenience stores is food and drink to fuel them as they go about their lives. Indeed, 32% of sales of food and drink through convenience stores are motivated by the need for fuel.<sup>4</sup> That's a 71% overtrade versus the rest of retail.<sup>4</sup>

This helps explain why glucose, sport and stimulant drinks are the biggest soft drinks sectors for the UK's convenience retailers,<sup>4</sup> accounting for £1.67bn in sales in 2024.<sup>4</sup> This contrasts to the wider retail sector, for which carbonates are the largest soft drinks category, with glucose, sport and stimulant drinks hot on their heels at number two.<sup>7</sup>

## ENERGISING THE UK

The UK needs energising, with seven in ten (71%) Brits saying they 'feel tired half to all the time.'<sup>8</sup> Increasingly, people are turning to soft drinks to provide the boosts they need. More than a third (35%) of people say they view energy boosting ingredients as essential<sup>9</sup> and consumption of drinks to provide energy or stimulation has increased by 93% over the past 10 years,<sup>10</sup> more than any other reason.

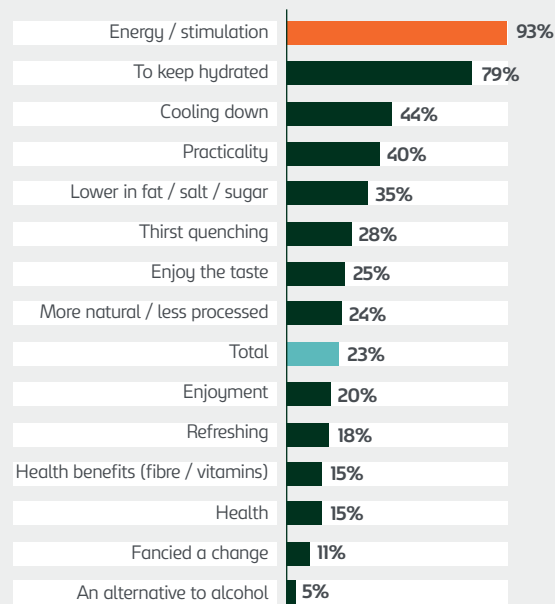
### % UK RESPONDENTS "HOW OFTEN HAVE YOU FELT TIRED?"



**35%**  
of people say they  
see energy-boosting  
ingredients as  
'essential'<sup>9</sup>

Drinks like Rockstar Energy®, Monster and Red Bull are playing a crucial role in topping up the UK's energy levels, but as a wider range of people look for pick-me-ups in a greater variety of occasions, opportunities are opening up for other types of energising drinks such as Purdey's Natural Energy, Jimmy's Iced Coffee and Plenish Energy Shots. Retailers need to boost their ranges to fully tap into the potential of the sector.

### DRINKING COLD DRINKS FOR 'ENERGY' IS THE FASTEST GROWING REASON FOR CONSUMING<sup>10</sup>



<sup>6</sup> Lumina Intelligence Market Sizing Insight & Analysis, June 2024

<sup>7</sup> Nielsen IQ RMS, Total Coverage inc Discounters, 52 weeks, data to 25.01.25

<sup>8</sup> YouGov Survey Dec 2021

<sup>9</sup> <https://www.just-drinks.com/news/energy-boosting-and-functional-ingredients-to-be-key-beverage-trends-in-2023-analysts-predict/#:~:text=Around%2035%25%20of%20people%20say,aid%20relaxation%20or%20improve%20mood.>

<sup>10</sup> Kantar Take Home Panel, 10 years, MAT to 24.12.23

## WHO BUYS ENERGY DRINKS

Demand for energising drinks spans a wide range of demographic groups and certainly isn't restricted to just younger people. Analysis reveals that people defined as 'busy providers' – adults with dependents and jobs – make up more than a third (36.8%) of those who buy energy drinks from convenience stores. This group has also seen the greatest increase – of 7.6% points – in the past year. Students, people defined as being 'young, free and single', single dwellers and child-free couples also make up a significant proportion of the people who buy energy drinks from convenience stores."

Who - lifestyle	52 weeks last year	Current 52 weeks	Change y/y
Student	4.2%	4.8%	+0.5pp
Young, free and single	15.5%	15.4%	-0.1pp
Single dwellers	16.1%	14.7%	-1.5pp
Child free couples	16.3%	14.4%	-1.9pp
Pre-nesters	12.9%	11.7%	-1.2pp
At home mums / dads	15.5%	11.5%	-4.0pp
Busy providers	29.2%	36.8%	+7.6pp
Post nesters	3.4%	2.7%	-0.7pp
Retired	2.1%	1.0%	-1.2pp

So, as we explored above, the need for refreshing, energising drinks transcends generations. That's why we're building a portfolio of drinks brands that provide fuel for a wider range of people whose demands depend on an increasingly diverse variety of factors including time of day and type of occasion.

The Rockstar Energy® range, for example, comprises full and zero-sugar sparkling energy drinks in a range of delicious flavours to provide boosts when they're most needed. Rockstar Energy's® communications and marketing – including the brand's partnerships with music festivals such as Creamfields, TRANSMT, Reading and Leeds – have been developed to resonate with the lifestyles of its legions of fans, providing opportunities for them to share in their passions.





## WHY ENERGY DRINKS MATTER

Energy drinks shoppers are particularly valuable for convenience retailers. Not only do they shop more frequently and buy more items in store than soft drinks shoppers, but they also spend significantly more

(£11.86 per trip versus £8.99).<sup>13</sup> Also significant is the fact that only 4.1% of convenience shoppers currently buy energy drinks.<sup>12</sup> This suggests there's plenty more growth to be had by stocking a wider range of drinks.



**SOFT DRINK SHOPPER<sup>11</sup>**

<b>15.3%</b>	<b>Average penetration current 52we</b>	<b>4.1%</b>
<b>0.0pp</b>	<b>Penetration growth 52we vs LY</b>	<b>+0.2pp</b>
<b>£8.99</b>	<b>Spend 52we</b>	<b>£11.86</b>
<b>-2.8%</b>	<b>Spend growth 52we</b>	<b>+7.0%</b>
<b>3.30</b>	<b>Basket size 52we</b>	<b>3.48</b>
<b>-6.1%</b>	<b>Basket size growth 52we vs LY</b>	<b>-4.4%</b>
<b>2.39</b>	<b>Frequency</b>	<b>2.93</b>
<b>+1.3%</b>	<b>Frequency growth 52we vs LY</b>	<b>+0.3%</b>



**ENERGY DRINK SHOPPER<sup>12</sup>**

The fact that only 4.1%<sup>12</sup> of convenience shoppers currently buy energy drinks (versus the 15.3%<sup>11</sup> who buy soft drinks in general) is a strong indication that there are opportunities for brands outside traditional energy drinks to capitalise on demand for drinks that fuel. That's why Purdey's Natural Energy, Jimmy's Iced Coffee and Plenish are increasingly appealing to people for who traditional energy drinks carry less appeal.

Research reveals just how open shoppers are to broadening their repertoires. Not only are natural energy drinks the fastest growing part of the energy drinks market,<sup>13</sup> but people who regularly buy into the category say they'd like to see a greater range of drinks that can fuel them throughout the day – 68%<sup>14</sup> say they'd like to see their favourite brand offer a Ready-to-Drink chilled coffee; and 53%<sup>14</sup> would find energy shots appealing as a morning boost.



<sup>12</sup> Lumina Intelligence Convenience Tracking Programme, Energy Drink Shopper, MAT 05.01.25 vs YA

<sup>13</sup> Lumina Intelligence Convenience Tracking Programme, Soft Drinks Shopper vs Energy Drink Shopper, MAT 05.01.25 vs YA

<sup>14</sup> Mintel, Sports & Energy Drinks, UK Report, 2024

## PLENISH SHAKES UP SHOTS WITH A NEW TAKE ON ENERGY

Plenish is broadening its horizons with its latest launch: Plenish Ginger Energy Shots. The new line blends yerba mate and cold-pressed raw ginger root, fruit and veg juices to provide an invigorating alternative (or accompaniment) to afternoon coffees or pre-workout energy drinks.

Available in 60ml single shots and the new 420ml multi-serve Dosing Bottle, which has been rolled out to the rest of the Plenish shots range, Plenish Ginger Energy Shots pack 20mg of naturally occurring caffeine per 100ml, as well as vitamins B6 and C and iron to fuel healthy lifestyles.

The launch coincided with the unveiling of two new Plenish Kids Shots, in Berry and Mango flavours. As with all Plenish products, the new shots contain no added sugars or preservatives and provide 100% of kids' recommended intake of vitamins C and D, iron and zinc.



All this suggests that retailers should ensure their ranging is on point in terms of variety – both in terms of flavour and format, as well as traditional and natural energy drinks – to attract energy drinks consumers. They should also make sure iced coffee lines are prominently displayed

to leverage growing demand for drinks that fuel and provide a treat. The addition of juice and shots to breakfast ranges can also drive incremental growth and provide day-long opportunities to energise sales.

## STEP TWO MAKE MEALS MATTER

Consider this: last year, soft drinks featured in only 28.6%<sup>15</sup> of meals eaten in the UK and, for those aged under 25, 27.7% of meals didn't include any kind of drink whatsoever.<sup>15</sup> That means retailers who can encourage more shoppers to pick up drinks when they're buying meals to eat on the go or to enjoy later at home, stand to unlock considerable growth. But how?

Let's start with the meal occasions least likely to feature soft drinks in convenience: meals for tonight, of which only 16.2% feature soft drinks.<sup>16</sup> Retailers can address this by taking a few simple steps, such as stocking soft drinks in larger and multipack formats in chillers alongside evening

meal solutions and offering set price meal deals on mains, desserts and drinks. Doing so will not only drive growth for retailers; it will also improve shoppers' perception of the value and convenience that outlets offer.



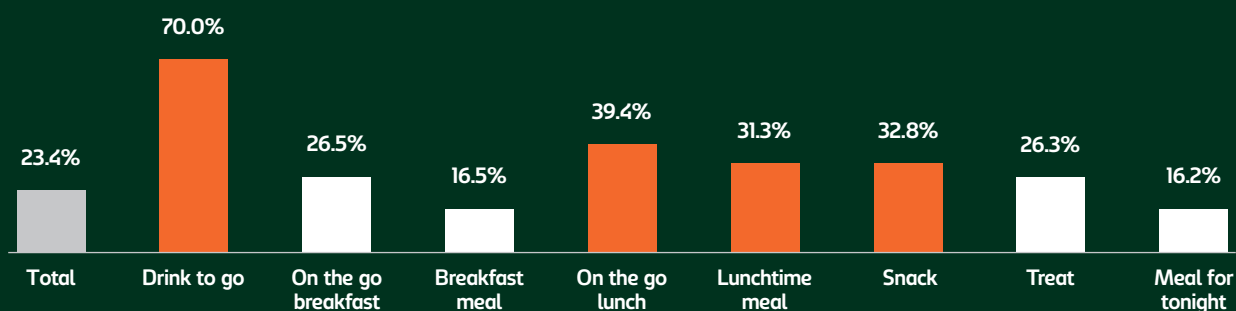
of meals in the UK, didn't feature soft drinks<sup>15</sup>

<sup>15</sup> Combined Kantar Usage Panel (IH) Soft Drinks with Food Occasions 52 w/e May 2024 v 2YA and MCA Eating Out Panel 52 W/E July 2024 v 2YA  
<sup>16</sup> Lumina Intelligence Convenience Tracking Programme, Total Soft Drinks, MAT 05.01.25 versus previous year



## MAKE A MEAL OF IT<sup>16</sup>

### SOFT DRINKS INCIDENCE %



**Soft drinks overtrade in lunch and snack however there is headroom for growth at breakfast, treat and dinner time occasions.**

Similar approaches pay off at breakfast time too. Currently, 26.5%<sup>16</sup> of on-the-go breakfasts and 16.5%<sup>16</sup> of breakfasts eaten at home feature soft drinks. By pairing products such as Jimmy's Iced Coffee in promotions on pastries and other breakfast items, or Plenish Health Shots with hot coffee, retailers can encourage people grabbing brekkie on the go to spend more. Positioning larger juice and smoothie formats alongside items like bacon and eggs can also increase the basket sizes of those looking to enjoy more leisurely breakfasts at home.

Of course, meal deals are also crucial when it comes to lunch – 39.4% of lunches that are eaten on the go feature soft drinks while 31.3% of those that are eaten at home feature soft drinks.<sup>16</sup> But it's not just the deal mechanic that matters; so too do the kinds of drinks that are featured. With demand for healthier, natural and, at times, more indulgent drinks growing, it's important your meal deal drinks range reflects changing tastes.

## PERFECT PAIRINGS WITH PEPSI

Pizza tastes better with a cool Pepsi MAX<sup>®</sup> on the side. That's the premise of The Co-op's ongoing Members deal, offering two pizzas, one side and a four-pack of 330ml cans of Pepsi MAX<sup>®</sup> (or four 330ml bottles of Peroni). With fewer people drinking alcohol,<sup>17</sup> linking food items with soft drinks is becoming an increasingly important promotional tactic for maintaining shopper spending levels.



Retailers can make meals matter by offering breakfast, lunch and dinner solutions and including soft drinks deals on hot and cold food meal deals. They should also use

different formats and price tiers to create 'good, better, best' tiers and include a wider range of drink types to meet a wider variety of consumer needs.

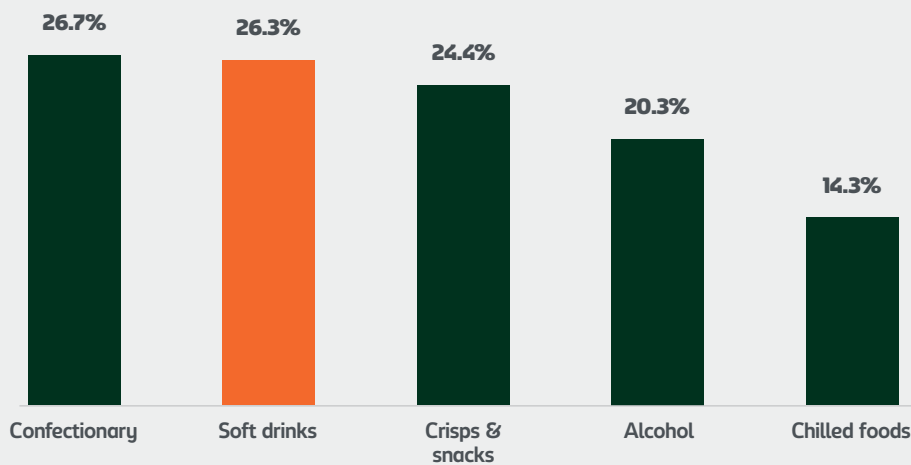
<sup>17</sup> Kantar Alcovision (% drinkers) 12 w/e 21.01.24

# STEP THREE TAKE OVER TREAT TIMES

Let's face it, we all need a treat every now and then. Increasingly, when the need for a treat strikes, people head to convenience stores – 11.9% of convenience shopper missions were for treats in 2024,<sup>18</sup> up from 11.6% in 2023.<sup>18</sup> Soft drinks play a crucial role in satisfying shoppers' cravings, with 26.4% of treat missions resulting in the sale of soft drinks.<sup>18</sup> That makes soft drinks the second most bought treat items after confectionery.

## TIME FOR A TREAT

### TOP 5 CATEGORIES IN THE CONVENIENCE TREAT MISSION %



However, it's important to consider what constitutes a treat in shoppers' minds and how that's changing. Here at Carlsberg Britvic, we believe in the power of new, exciting and novel drinks experiences in driving incremental sales. Research backs this up: in 2024, 53%<sup>19</sup> of consumers aged 18 to 44 said they typically choose traditional flavours when buying soft drinks, down from 63%<sup>19</sup> in 2022; 31%<sup>19</sup> said they go for unusual flavours (up from 26%)<sup>19</sup> and 16%<sup>19</sup> prefer "trendy" flavours (up from 12%).<sup>19</sup>

This demonstrates that while stocking the classics – such as Pepsi MAX®, 7UP and Tango Orange – is vital, so too is introducing new limited-edition flavours to pique shoppers' interest. We've unlocked significant growth in recent years with our limited editions: last year's launch of zesty lemon blue cola, Pepsi Electric achieved sales of £2.8m,<sup>20</sup> while Tango Mango has racked up £3.6m and Pepsi Strawberries 'N' Cream and Cream Soda colas have achieved sales of £2.3m since launch in February.<sup>21</sup>



<sup>18</sup> Lumina Intelligence Convenience Tracking Programme, Total Soft Drinks, MAT 05.01.25 vs. YA

<sup>19</sup> GlobalData Flavours and Functions report Sept 2024

<sup>20</sup> Nielsen IQ, Total Convenience, Total Soft Drinks Britvic Defined, Value sales, 52WE 04.01.25

<sup>21</sup> NIQ RMS, Total Convenience, Total Pepsi Treats, value sales, 12 weeks from launch, 12WE 19.04.2025



## INTRODUCING... JIMMY'S ICED COFFEE DONUT FLAVOUR

What do you get if you blend the rich, bold flavours of Rainforest Alliance-certified Arabica coffee, semi-skimmed milk and the decadence of donuts? Limited-edition Jimmy's Iced Coffee Donut! With 74%<sup>22</sup> of Generation Z on the hunt for new and unusual coffee flavours and 77%<sup>22</sup> finding limited editions appealing, Jimmy's latest drop, which rolled out in April, is set to be a sure-fire hit with younger consumers.



# STEP FOUR CAPITALISE ON IMPULSIVE SOCIALISING

Humans are social animals. This means that even when finances are tight, people still want to get together with friends and family. It's not a question of *if* they will socialise but *how*. In-home socialising occasions hit 17 billion last year as 37% of people reported going out to eat and drink less in response to economic pressures.<sup>23</sup> This presents opportunities for convenience retailers that offer the right drinks at the right price for people who are socialising at home.

There are many ways operators can do this, from ensuring packs for Fruit Shoot are clearly visible and well-promoted at Easter, (the same applies for new limited-edition J2O Dragonberry in the summertime) to pairing London Essence Company premium tonic waters and crafted sodas with alcohol in promotions. Remember also that alcohol moderation continues to rise – 26.6% of drinkers say they never drink or less often than the previous year, compared to just 18.1% in 2016.<sup>24</sup>

This is where products such as the J2O range, London Essence Company crafted soda, and Pepsi MAX® flavoured colas range comes into play. By stocking these

prominently in stores and offering attractive deals on them, retailers can attract those who are moderating their alcohol intake (87%<sup>25</sup> of whom agree that soft drinks are more appealing than low/no alternatives).



<sup>22</sup> FMCG Gurus 2023

<sup>23</sup> Mintel Leisure Outlook Report 2023

<sup>24</sup> Kantar alcovision % of Drinkers, 12month ending to 31st Dec 2023 vs 12month ending 31st Dec 2016

<sup>25</sup> Mintel Attitudes to Low/No Alcohol 2022

# STEP FIVE ADD VALUE TO HYDRATION

A new generation is reshaping the soft drinks market: Generation Z. This group comprises people born between 1997 and 2012,<sup>26</sup> and their behaviour when it comes to soft drinks differs considerably from older generations because they drink considerably more tap water.<sup>27</sup> In fact, nearly a third (31%) of all Gen Z drinks occasions feature tap water, bottled water or flavoured hydration drinks like ice tea compared to a UK average of 24%.<sup>27</sup>

Of course, this brings with it challenges for soft drinks producers and retailers. But it also presents significant opportunities. Bear in mind that plain water offers the lowest price per litre of any soft drink<sup>28</sup> and 53% of shoppers are prepared to buy such products at ambient temperature<sup>29</sup>, so retailers should consider stocking just a few water SKUs in the limited in-aisle chiller space they have and prioritise drinks that offer higher margins.

Drinks like Aqua Libra's range of pure filtered still, sparkling and flavoured waters (available in Cucumber, Mint & Lime, Blood Orange & Mango, Raspberry & Blackcurrant and Watermelon & Strawberry flavours), Lipton Ice Tea and Kombuchas provide further opportunities for retailers to encourage people looking for hydration to trade up. While stocking Robinsons Minis at till points is an effective way of driving sales to people who carry reusable water bottles.



## A SPARKLING OPPORTUNITY

Brits are developing a thirst for unsweetened, natural and hydrating soft drinks. Look no further than the strong growth in sales of Aqua Libra and rival, Dash Water's flavoured sparkling water lines for proof.

Aqua Libra is growing at nearly twice the rate of Dash, thanks to growing retail distribution and more shoppers discovering the brand's delicious range of infused waters. To accelerate growth, we added a Watermelon & Strawberry variant to the core range (Raspberry & Blackcurrant, Blood Orange & Mango and Cucumber, Mint & Lime) in February.

Innovations like this – along with the 2024 launch of Aqua Libra's Pure Filtered Still and Sparkling Water lines – are playing an important role in keeping Gen Zs,<sup>30</sup> who drink significantly more water than older people, engaged with soft drinks.

**AQUA  
LIBRA**

£993.5k	£463.7k	87.5%
Value	Value growth	% value growth
£1,012.8k	£297.5k	40.9%

28

**DA-  
SH**  
WATER



<sup>26</sup> Beresford Research: <https://www.beresfordresearch.com/age-range-by-generation/>

<sup>27</sup> Kantar Usage Panel In Home and Carried Out, including Tap Water, 52 we 4 Aug 24

<sup>28</sup> Nielsen IQ, Total Convenience, Total Soft Drinks Britvic Defined, Value Sales, 52 we 04.01.25

<sup>29</sup> Lumina Intelligence Channel Pulse w/c 28.12.20

<sup>30</sup> Kantar In Home Usage Panel (52 weeks), August 2024



# STEP SIX PUSH PERMISSIBLE CHOICES

So, people want treats and they're increasingly turning to soft drinks to get them. But that doesn't mean they're prepared to forego health considerations. Hence the fact that low-calorie soft drinks have grown at 5.5%<sup>28</sup> in value over the past year, outperforming full sugar products which inched up by 3%.<sup>28</sup> Independents see rapid growth in sugar-free drinks (+9.4%) suggesting demand is there for healthier alternatives.<sup>31</sup>

That's why it's crucial that convenience retailers are well-stocked with sugar-free classics like Pepsi MAX®, Tango Sugar-Free and 7UP Zero Sugar in a variety of formats and with a wide range of flavour alternatives such as the new 7UP Pink Lemonade and Pepsi zero sugar Strawberries 'N' Cream and Cream Soda. With 55% of shoppers only ever buying zero-sugar colas,<sup>32</sup> it's clearly important such products are easy to find in stores and well chilled.

It's also essential to remember that notions of health are changing. Functional health benefits like added vitamins, minerals and natural ingredients are growing needs for consumers as low levels of sugar, salt or fat become hygiene factors.<sup>33</sup>

We're helping retailers tap this growing demand for natural drinks with functional ingredients with our range of Plenish health shots, as well as the Lipton Kombucha we launched in March 2025. A refreshing, lightly sparkling drink with naturally fermented tea and available in three flavours: Raspberry, Mango & Passionfruit and Strawberry & Mint.



## SUGAR-FREE SOFT DRINKS WIN SHARE<sup>28</sup>

LOW-CALORIE  
SALES

**£1.5bn** **+5.5%**

STANDARD  
SALES

**£3.8bn** **+3.0%**



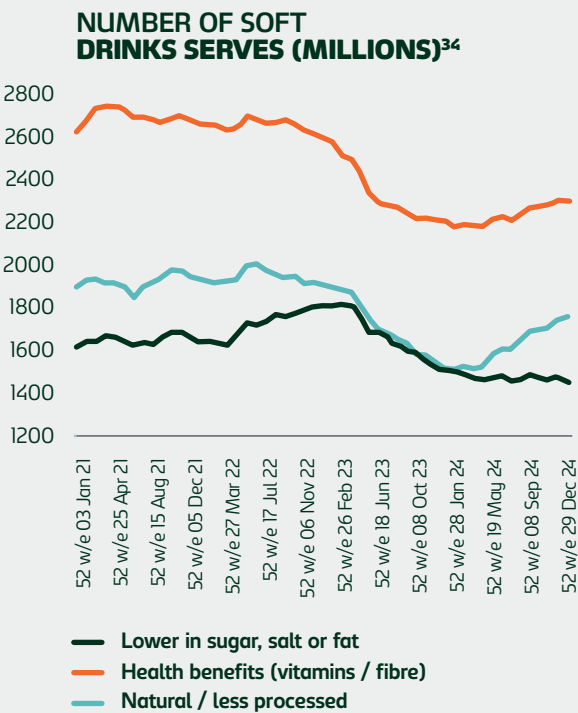
<sup>31</sup> Nielsen IQ, Total Independents, Total Soft Drinks, Britvic Defined, Value Sales, 52we 04.01.25

<sup>32</sup> Kantar In Home Cola, MAT to August 2024

<sup>33</sup> Kantar In Home and carried OOH Usage Panel, Total Soft Drinks, MAT 29.12.24

# HOW HEALTH CONSCIOUSNESS IS CHANGING

Concepts of health are changing, and this is impacting how people view soft drinks. More shoppers are picking up products like our Aqua Libra infused waters and Purdey's Natural Energy drinks because they want to be refreshed by beverages with additional health benefits (like the added vitamins and botanicals in Purdey's) or more natural ingredients.



**HEALTH MEANS DIFFERENT THINGS TO DIFFERENT PEOPLE<sup>35</sup>**

Share of soft drinks serves consumed for health indexed against total

	Healthy lifestyle	Less healthy lifestyle
Low in sugar, salt or fat	ix. 83	ix. 113
Health benefits (vitamins / fibre)	ix. 83	ix. 96
Natural / less processed	ix. 83	ix. 92

No sugar buyers continue to drive category growth through increased consumption<sup>36</sup>



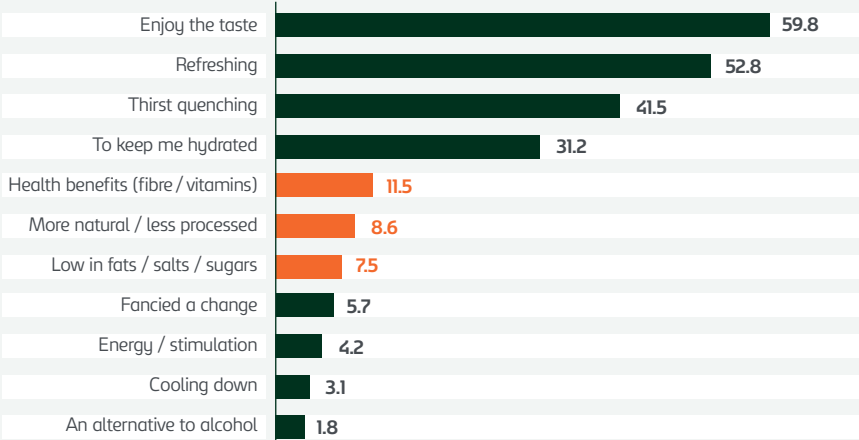
**55%**  
of shoppers now only buy no sugar cola



No sugar shoppers spend **1/3 MORE** than full sugar shoppers

Low and no sugar soft drinks growth sit behind emerging health needs as it is now a hygiene factor

**% CONSUMER NEEDS FROM SOFT DRINKS<sup>37</sup>**



34 Kantar In Home and Carried OOH Usage Panel, Total Soft Drinks, MAT 29.12.24  
35 Kantar Take Home Usage Panel, Total Soft Drinks, August 2024  
36 Kantar In Home Cola, MAT to August 2024  
37 Kantar Take Home Usage Panel, Total Soft Drinks, Data to 4th August 2024



# STEP SEVEN RECRUIT WITH HEALTHY HEROES

This brings us neatly to the final step retailers should take as they move in on the £225m<sup>38</sup> prize we've identified: of course, they need to reel people in with refreshing and delicious drinks, but increasingly they also need to consider the *health credentials of their range*. And, as we've already explored, health can mean different things to different people, at different times of the day.

Health is no longer niche. After all, 69%<sup>39</sup> of Brits say they're trying to live healthier lifestyles and the food and drink they consume plays a key role in helping them achieve this. But strategies are changing. Products with added benefits – such as providing a portion of fruit, veg, added protein, fibre or vitamins – increased share of total drinks occasions by 1.4% points between 2014 and last year;<sup>40</sup> products with lower levels of sugar, calories or fat increased share by 0.2% points.<sup>40</sup>

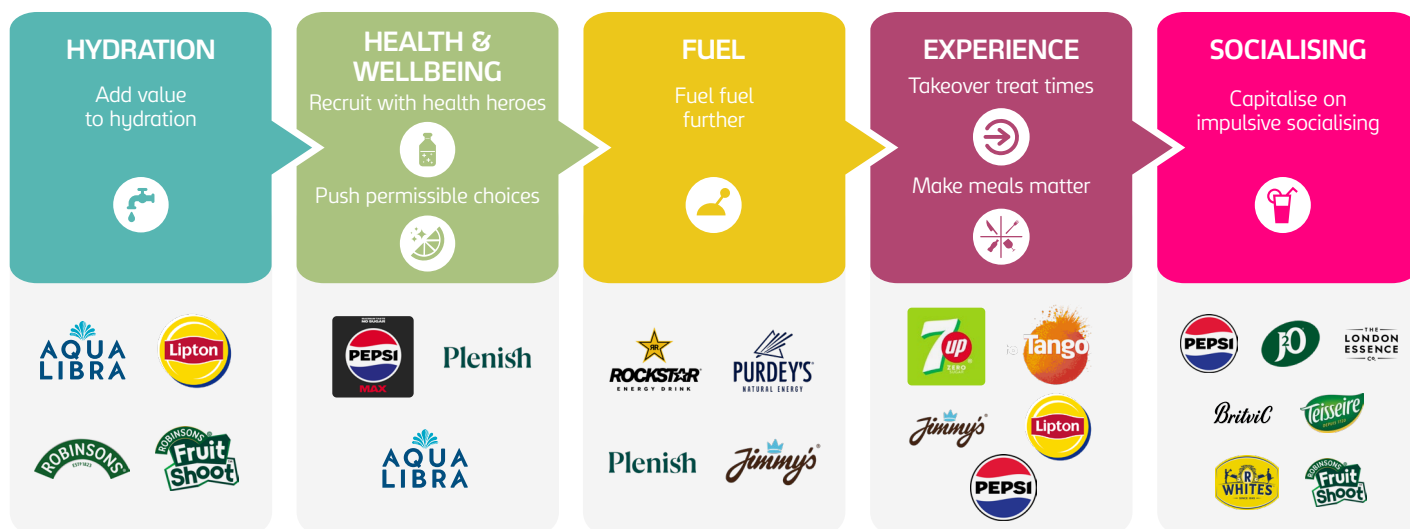
The trend for added benefits is maturing at pace. Just look at the rise in products such as Plenish's Gut Health Shots, M&S's Yay Mushrooms range of drinks containing adaptogenic mushrooms<sup>41</sup> and nootropics drinks brands such as Common.<sup>42</sup> Retailers can capitalise on this trend by pairing functional health drinks with healthy snacks and meals at different times of the day.

Pairing Plenish's health shots with breakfast items can drive incremental growth for retailers and accelerate the 99% growth achieved by health shots in convenience in the past year.<sup>43</sup> Indeed, if shots accounted for the same proportion of sales in convenience as they did in the wider grocery channel, they would deliver an additional £1.3m in sales for the channel.<sup>43</sup>

Kombucha is another opportunity ripe for the taking. Sales have grown by 33%<sup>43</sup> in convenience over the past year and they are poised for further growth following the March launch of the Lipton Kombucha range, which brings a mainstream, recognised brand to the category. Stocking Lipton Kombucha prominently in chillers will help alert shoppers to retail ranges and serve as a beacon for the nascent category.

From Lipton iced teas, kombuchas, Plenish juices and shots through to our range of sugar-free colas and carbonates and Purdey's Natural Energy Drinks, Carlsberg Britvic's healthy heroes have every soft drink occasion covered. Contact us today to unlock £5k<sup>38</sup> per store growth in your business.

**Carlsberg Britvic is well placed to deliver the future fuel for growth, with a brand portfolio that spans critical category growth spaces.**



<sup>38</sup> Quantic Britvic Driver Quantification 2023; 2028 Forecast of £1.1BN- Convenience Fare Share of the Retail Opportunity (£678m) apportioned across 49k stores

<sup>39</sup> Mintel Attitudes Towards Healthy Eating 2022

<sup>40</sup> Kantar Usage Panel – total food & drink servings chose for "health", rolling 52 week periods

<sup>41</sup> <https://www.thegrocer.co.uk/comment-and-opinion/does-the-science-behind-mandss-yay-mushrooms-range-hold-up/699819.article>

<sup>42</sup> <https://www.thegrocer.co.uk/news/common-drinks-raises-six-figure-funding-to-launch-functional-drinks-range/692324.article>

<sup>43</sup> Nielsen IQ, Total Convenience, Total Soft Drinks Britvic Defined, Value sales, 52WE 04.01.25

## Total soft drinks/take home/single serve: Annual changes

	Sales Value	Sales Value Chg YA	Sales Value % Chg YA	Sales (LTRS)	Sales (LTRS) Chg YA	Sales (LTRS) % Chg YA	Sales Units	Sales Units Chg YA	Sales Units % Chg YA
Total soft drinks	5,288,188,884	185,786,467	3.6	2,499,975,173	47,005,941	1.9	3,313,542,450	-15,062,064	-0.5
Take home	1,677,047,734	44,249,434	2.7	1,397,528,677	40,863,463	3.0	804,367,008	-14,852,739	-1.8
Single	3,611,141,150	141,537,034	4.1	1,102,446,496	6,142,478	0.6	2,509,175,441	-209,325	0.0

Nielsen IQ, Total Convenience, Total Soft Drinks Britvic Defined, Value sales, 52WE 04.01.25

## Soft drink category winners & losers

Category	Sales Value	Sales Value Chg YA	Sales Value % Chg YA	Sales (LTRS)	Sales (LTRS) Chg YA	Sales (LTRS) % Chg YA	Sales Units	Sales Units Chg YA	Sales Units % Chg YA
Cola	1093445397	14927159	1.4	563340100	-13753994	-2.4	620698640	-15808109	-2.5
Dairy and dairy substitute	209735736	24113461	13.0	61085443	4061399	7.1	129910169	9295301	7.7
Flavoured water	135094762	14911191	12.4	93672332	4907679	5.5	103676226	6421459	6.6
Fruit carbonates	471878701	8098528	1.7	242702852	-6726920	-2.7	327755960	-3258803	-1.0
Functional water	27566029	-465921	-1.7	13951140	-1649282	-10.6	20450574	-490461	-2.3
Glucose drinks	223246371	-2252668	-1.0	84710975	-3044309	-3.5	134272850	-10613461	-7.3
Juice drinks	275422018	-3020401	-1.1	104987776	-3828480	-3.5	197344322	-11336426	-5.4
Lemonade	51885588	-3267210	-5.9	69890923	-4852319	-6.5	40050595	-3481775	-8.0
Mixers	42403198	-3364150	-7.4	26633841	-1618402	-5.7	28157289	-1662776	-5.6
Non fruit carbonates	95913845	3275191	3.5	58892922	49220	0.1	70763037	-347642	-0.5
Plain water	566716716	57577466	11.3	562421197	61526486	12.3	402165997	16870454	4.4
Pure juice	267033533	13959512	5.5	94070283	-5923435	-5.9	145331492	-3777607	-2.5
RTD coffee	154203044	8305743	5.7	27365593	1620259	6.3	88129692	2586354	3.0
RTD tea	49591552	1748183	3.7	16078900	-615335	-3.7	29977287	-768429	-2.5
Smoothies	97934132	5957358	6.5	19645295	1587406	8.8	48978878	3050558	6.6
Sports drinks	204741499	-55230828	-21.2	75443731	-12415495	-14.1	139639453	-23432723	-14.4
Squashes	74691327	-2814452	-3.6	39973042	-2994496	-7.0	42076271	-1551024	-3.6
Stimulant drinks	1246177130	103498175	9.1	319907461	12081494	3.9	744023130	23495907	3.3
Total soft drinks	5288188884	185,786,467	3.6	2499975173	47005941	1.9	3313542450	-15062064	-0.5

Nielsen IQ, Total Convenience, Total Soft Drinks Britvic Defined, Value sales, 52WE 04.01.25



## Top 10 Brand Winner in Convenience: Ranked by value change vs year ago

Category	Brand	Sales Value	Sales Value Chg Ya	Sales Value % Chg Ya
Stimulant drinks	Monster	504,121,984	61,346,607	13.9
Stimulant drinks	Red Bull	586,785,333	60,654,390	11.5
Plain water	Buxton	120,288,259	16,502,468	15.9
Plain water	Pure Life	30,663,206	10,112,594	49.2
Pure juice	Innocent	46,956,689	9,514,426	25.4
Flavoured water	Volvic	89,256,107	9,482,949	11.9
Plain water	Highland Sping	66,598,797	9,367,920	16.4
Cola	Pepsi	323,611,682	9,275,469	3.0
Fruit carbonates	Dr Pepper	99,740,707	7,520,608	8.2
RTD coffee	Starbucks	77,205,354	6,748,201	9.6

Nielsen IQ, Total Convenience, Total Soft Drinks Britvic Defined, Value sales, 52WE 04.01.25

## Top 10 Brand Performance: Ranked by value

Category	Brand	Sales Value	Sales Value Chg Ya	Sales Value % Chg Ya
Cola	Coca-Cola	756,952,818	5,473,926	0.7
Stimulant drinks	Red Bull	586,785,333	60,654,390	11.5
Stimulant drinks	Monster	504,121,984	61,346,607	13.9
Cola	Pepsi	323,611,682	9,275,469	3.0
Glucose drinks	Lucozade	212,997,079	653,488	0.3
Fruit carbonates	Fanta	150,474,982	-7,304,845	-4.6
Sports drinks	Lucozade	135,099,757	1,826,682	1.4
Plain water	Evian	127,299,265	5,553,872	4.6
Plain water	Buxton	120,288,259	16,502,468	15.9
Fruit carbonates	Dr Pepper	99,740,707	7,520,608	8.2

Nielsen IQ, Total Convenience, Total Soft Drinks Britvic Defined, Value sales, 52WE 04.01.25

## Top 20 NPD - convenience

Category	Brand	Flavour	Sales Value £M's
Stimulant drinks	Monster Juiced	Bad Apple	10.79
Sports drinks	Lucozade Sport	Blue Force	9.09
Glucose drinks	Lucozade Energy	Blue Burst	6.97
Cola	Coca-Cola Zero	Lemon Cola	6.23
Cola	Coca-Cola	Lemon Cola	6.00
Stimulant drinks	Red Bull The Pink Edition Sugar Free	Forest Fruits	5.61
Fruit carbonates	Tango Editions Sugar Free	Mango	3.58
Stimulant drinks	Red Bull The Green Edition	Curuba & Elderflower	3.10
Stimulant drinks	Red Bull The Blue Edition	Juneberry	2.98
Cola	Pepsi Electric Zero Sugar	Cola With Citrus	2.82
Stimulant drinks	Lucozade Alert	Blue Rush	2.35
Stimulant drinks	Red Bull The Winter Edition	Vanilla & Berry	2.22
Stimulant drinks	Monster Energy Reserve	Orange Dreamsicle	2.12
Sports drinks	Prime Hydration	Cherry	1.96
Fruit carbonates	Tango Limited Drop	Raspberry Blast	1.91
Cola	Coca-Cola Zero	Oreo Cola	1.87
Fruit carbonates	Tango Limited Drop	Cherry Blast	1.76
Plain water	Ursu	Original	1.65
Sports drinks	Prime Hydration	Strawberry Lemonade	1.59
Stimulant drinks	Red Bull The Green Edition Sugar Free	Curuba & Elderflower	1.54

Nielsen IQ, Total Convenience, Total Soft Drinks Britvic Defined, Value sales, 52WE 04.01.25

## Manufacturer performance (top ten) convenience GB

	Sales Value YA	Sales Value	Sales Value Chg YA	Sales Value % Chg YA
CCE	1,692,124,917	1,746,273,123	54,148,205	3.2
Red Bull	526,131,711	586,785,821	60,654,110	11.5
Britvic	545,630,405	555,358,629	9,728,224	1.8
SBF GB&I	419,231,140	420,342,316	1,111,176	0.3
Private Label	295,258,111	328,563,856	33,305,744	11.3
Danone	260,393,062	274,079,873	13,686,811	5.3
Nestle Waters	157,002,947	186,652,840	29,649,893	18.9
Barrs	171,722,476	174,969,660	3,247,184	1.9
Innocent	88,439,878	101,877,406	13,437,528	15.2
Arla Foods	70,718,553	77,848,283	7,129,730	10.1

Nielsen IQ, Total Convenience, Total Soft Drinks Britvic Defined, Value sales, 52WE 04.01.25



## Segment performance convenience GB

	Sales Value	Sales Value Chg YA	Sales Value % Chg YA	Sales (LTRS)	Sales (LTRS) Chg YA	Sales (LTRS) % Chg YA
Cola	1,093,445,397	14,927,159	1.4	563,340,100	-13,753,994	-2.4
Dairy and dairy substitute	209,735,736	24,113,461	13.0	61,085,443	4,061,399	7.1
Flavoured water	135,094,762	14,911,191	12.4	93,672,332	4,907,679	5.5
Fruit carbonates	471,878,701	8,098,528	1.7	242,702,852	-6,726,920	-2.7
Functional water	27,566,029	-465,921	-1.7	13,951,140	-1,649,282	-10.6
Glucose drinks	223,246,371	-2,252,668	-1.0	84,710,975	-3,044,309	-3.5
Juice drinks	275,422,018	-3,020,401	-1.1	104,987,776	-3,828,480	-3.5
Lemonade	51,885,588	-3,267,210	-5.9	69,890,923	-4,852,319	-6.5
Mixers	42,403,198	-3,364,150	-7.4	26,633,841	-1,618,402	-5.7
Non fruit carbonates	95,913,845	3,275,191	3.5	58,892,922	49,220	0.1
Plain water	566,716,716	57,577,466	11.3	562,421,197	61,526,486	12.3
Pure juice	267,033,533	13,959,512	5.5	94,070,283	-5,923,435	-5.9
RTD coffee	154,203,044	8,305,743	5.7	27,365,593	1,620,259	6.3
RTD tea	49,591,552	1,748,183	3.7	16,078,900	-615,335	-3.7
Smoothies	97,934,132	5,957,358	6.5	19,645,295	1,587,406	8.8
Sports drinks	204,741,499	-55,230,828	-21.2	75,443,731	-12,415,495	-14.1
Squashes	74,691,327	-2,814,452	-3.6	39,973,042	-2,994,496	-7.0
Stimulant drinks	1,246,177,130	103,498,175	9.1	319,907,461	12,081,494	3.9
<b>Total soft drinks</b>	<b>5,288,188,884</b>	<b>185,786,467</b>	<b>3.6</b>	<b>2,499,975,173</b>	<b>47,005,941</b>	<b>1.9</b>

Nielsen IQ, Total Convenience, Total Soft Drinks Britvic Defined, Value sales, 52WE 04.01.25

## Segment performance Symbols & Independents

	Sales Value	Sales Value Chg YA	Sales Value % Chg YA	Sales (LTRS)	Sales (LTRS) Chg YA	Sales (LTRS) % Chg YA
Cola	479,862,824	-4,174,366	-0.9	248,311,423	-15,114,707	-5.7
Dairy and dairy substitute	99,244,114	10,056,189	11.3	30,100,533	1,695,930	6.0
Flavoured water	59,743,049	4,438,225	8.0	38,390,644	1,465,177	4.0
Fruit carbonates	242,579,791	3,185,476	1.3	129,007,468	-3,765,712	-2.8
Functional water	7,511,125	857,935	12.9	4,264,028	392,088	10.1
Glucose drinks	104,206,045	2,040,279	2.0	39,910,262	308,910	0.8
Juice drinks	131,199,244	-5,004,296	-3.7	51,567,309	-3,816,266	-6.9
Lemonade	22,821,073	-3,939,984	-14.7	28,994,293	-4,733,981	-14.0
Mixers	14,683,412	-2,167,242	-12.9	9,275,588	-1,183,498	-11.3
Non fruit carbonates	55,250,749	1,463,459	2.7	37,804,642	310,432	0.8
Plain water	160,505,666	13,516,571	9.2	141,259,608	7,512,484	5.6
Pure juice	50,527,499	75,626	0.2	19,255,130	-2,768,949	-12.6
RTD coffee	47,714,997	64,150	0.1	7,858,360	-17,611	-0.2
RTD tea	17,236,871	554,575	3.3	5,648,507	-456,394	-7.5
Smoothies	5,249,099	346,877	7.1	990,290	55,314	5.9
Sports drinks	103,090,246	-33,038,556	-24.3	42,311,181	-7,304,132	-14.7
Squashes	30,068,052	-1,989,993	-6.2	16,465,114	-1,724,150	-9.5
Stimulant drinks	698,026,883	52,972,863	8.2	186,700,158	4,061,820	2.2
<b>Total soft drinks</b>	<b>2,328,902,275</b>	<b>38,761,288</b>	<b>1.7</b>	<b>1,041,978,829</b>	<b>-21,945,022</b>	<b>-2.1</b>

Nielsen IQ, Symbols & Independents, Total Soft Drinks Britvic Defined, Value sales, 52WE 04.01.25

## Segment performance Forecourts

	Sales Value	Sales Value Chg YA	Sales Value % Chg YA	Sales (LTRS)	Sales (LTRS) Chg YA	Sales (LTRS) % Chg YA
Cola	93,607,776	-6,562,146	-6.6	31,056,477	-3,955,848	-11.3
Dairy and dairy substitute	10,488,803	-1,710,744	-14.0	2,199,148	-485,674	-18.1
Flavoured water	10,274,531	-636,441	-5.8	4,542,754	-1,103,748	-19.5
Fruit carbonates	33,337,355	-6,816,332	-17.0	10,917,913	-2,767,929	-20.2
Functional water	3,324,897	-779,888	-19.0	1,049,448	-352,952	-25.2
Glucose drinks	19,430,580	-4,038,624	-17.2	4,617,928	-1,595,893	-25.7
Juice drinks	26,098,490	-6,015,234	-18.7	6,787,641	-2,298,228	-25.3
Lemonade	3,067,998	-21,904	-0.7	2,360,214	-310,108	-11.6
Mixers	1,442,968	-245,706	-14.6	520,311	-145,477	-21.9
Non fruit carbonates	5,678,259	-433,944	-7.1	1,977,235	-94,712	-4.6
Plain water	64,014,960	-3,476,206	-5.2	34,635,100	-3,937,330	-10.2
Pure juice	8,597,826	-1,027,818	-10.7	1,695,449	-885,442	-34.3
RTD coffee	14,945,188	-1,165,967	-7.2	1,980,411	-203,364	-9.3
RTD tea	4,452,066	-641,495	-12.6	1,068,498	-299,015	-21.9
Smoothies	1,925,680	-519,927	-21.3	244,067	-128,508	-34.5
Sports drinks	20,819,875	-12,892,325	-38.2	5,173,104	-3,015,475	-36.8
Squashes	1,452,181	-456,314	-23.9	619,682	-240,928	-28.0
Stimulant drinks	162,339,058	-9,756,034	-5.7	32,320,557	-2,669,141	-7.6
<b>Total soft drinks</b>	<b>485,296,499</b>	<b>-57,198,005</b>	<b>-10.5</b>	<b>149,300,187</b>	<b>-20,217,867</b>	<b>-11.9</b>

Nielsen IQ, Multiple Forecourts, Total Soft Drinks Britvic Defined, Value sales, 52WE 04.01.25



## Segment performance Convenience Multiples

	Sales Value	Sales Value Chg YA	Sales Value % Chg YA	Sales (LTRS)	Sales (LTRS) Chg YA	Sales (LTRS) % Chg YA
Cola	83,865,961	1,437,415	1.7	37,970,669	-2,007,367	-5.0
Dairy and dairy substitute	11,833,277	1,528,794	14.8	3,139,273	-24,407	-0.8
Flavoured water	8,796,593	2,538,348	40.6	4,612,278	1,025,814	28.6
Fruit carbonates	37,379,466	-759,830	-2.0	16,151,619	-1,497,570	-8.5
Functional water	7,912,956	266,999	3.5	4,554,852	-471,619	-9.4
Glucose drinks	13,418,818	-463,354	-3.3	4,647,838	-384,594	-7.6
Juice drinks	25,570,967	395,124	1.6	8,362,973	-740,786	-8.1
Lemonade	2,057,993	-338,997	-14.1	3,393,483	-340,817	-9.1
Mixers	2,454,584	-226,094	-8.4	1,258,103	-38,554	-3.0
Non fruit carbonates	6,390,940	180,737	2.9	2,821,041	-65,562	-2.3
Plain water	99,383,705	9,514,018	10.6	47,899,205	3,042,351	6.8
Pure juice	12,526,379	871,963	7.5	3,362,073	8,188	0.2
RTD coffee	10,019,809	-402,019	-3.9	1,362,719	-117,220	-7.9
RTD tea	5,578,612	244,782	4.6	1,494,181	-26,982	-1.8
Smoothies	9,147,010	1,054,038	13.0	1,298,782	77,151	6.3
Sports drinks	15,313,960	1,353,533	9.7	4,955,592	396,461	8.7
Squashes	3,034,724	-174,469	-5.4	1,438,859	-88,959	-5.8
Stimulant drinks	61,618,646	2,935,701	5.0	15,278,163	-318,465	-2.0
<b>Total soft drinks</b>	<b>416,298,472</b>	<b>19,950,924</b>	<b>5.0</b>	<b>166,695,839</b>	<b>-410,876</b>	<b>-0.2</b>

Nielsen IQ, Convenience Multiples, Total Soft Drinks Britvic Defined, Value sales, 52WE 04.01.25

# GLOSSARY

## Carbonates

A drink made from carbonated water to which juice, flavourings and other ingredients have been added

## Cola

Cola flavoured carbonated drinks including cola with flavours such as cherry, twist of lemon etc

## Diet vs standard

Diet Brands and NAS Brands. Diet Brands (e.g. Diet Coke) are items described as Low Calorie/Low Sugar or Caffeine Free and NAS brands = Zero brands (e.g. Pepsi MAX® and Coke Zero) are items described as No Added Sugar, NAS, N.A.S. or Sugar Free. Standard - All other products, including plain water

## Dilutes (also see Squash)

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

## Energy drinks (also see Stimulants)

All energy 'boosting' drinks such as Red Bull and Rockstar. Normally fizzy

## 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 contain fruit

## Flavoured hydration

Sparkling or still flavoured water, juice drinks or iced tea in kids or adult formats

## Fruit flavoured carbonates

Flavours are typically orange, lemon & lime, tropical and other mixed fruit flavours. E.g. Tizer and Dr Pepper are included as these contain fruit flavours and some brands may contain juice e.g. Tango

## Iced coffee

A ready-to-drink packaged coffee beverage, containing coffee, that is usually consumed chilled

## Lemonade

All conventional clear, cloudy or traditional carbonated lemonade. Some with lemon juice and additional ingredients to produce coloured lemonade

## Missions (also shopper missions)

The purpose for which a shopper visits an outlet

## Mixers

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

## Natural energy

Natural Energy are Energy drinks which contain stimulants from a natural source

## Non-fruit flavoured carbonates

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

## Occasions

The reason for consumption, e.g. routine meal together

## Pure juice

A non-carbonated 100% single fruit juice or other juice blend with no added water, sweetener or other additives. Includes all concentrated juices

## Smoothies

Generally drinks described as smoothie, either in brand name or as a descriptor on the packaging

## Sports drinks

Drinks that are designed to replace, sugars, minerals and fluids lost as a result of exercise. Can include powders and dilutables

## Squash (also see Dilutes)

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

## Still Juice drinks

A non-carbonated drink containing fruit juice, plus water and other ingredients

## Stills

Collective term for the non-carbonated segments

## Stimulants (also see Energy drinks)

All energy 'boosting' drinks such as Red Bull and Rockstar. Normally fizzy

## Water

Still or sparkling water with nothing else added

## Water plus / Flavoured water

Sparkling or still flavoured water



**CARLSBERG**  
**BRITVIC**