

BRITVIČ

Convenience & Impulse

Soft Drinks Review 2024



Welcome

to the Britvic Soft Drinks Review

Soft drinks: stability in a volatile world

In 2023, soft drinks once again proved their resilience, relevance, and ability to excite people from all walks of life. They can be affordable treats, sophisticated alternatives to alcohol, energising pick-me-ups, refreshing health supplements and even fashion statements. And as a new wave of brands build sales, soft drinks are becoming an ever-broader church.

As we explore over the following pages, the UK soft drinks market has achieved solid growth driven by a combination of price and innovation. Overall volumes have slipped, although at a slower rate than most other categories. Despite ongoing volatility around the world, costs are becoming more predictable and inflation more manageable. Good old-fashioned cost management, understanding consumer needs and addressing them with exciting new products and compelling marketing campaigns are the name of the game once again.

At Britvic, we're proud to have helped the category grow in 2023. We've added to our portfolio with the acquisition of Jimmy's Iced Coffee and continued to invest in innovations like our clean-label Plenish Barista M*lks and new flavours such as Pepsi MAX® Mango and Tango Editions Sugar Free Paradise Punch. All of these have struck a chord with consumers and added value for us and our partners.

We've focused on connecting with people through our imaginative and relative marketing campaigns. Tango, for example, has another offbeat, irreverent and downright funny ad campaign to thank for much of its success over the past year, while Pepsi has benefitted from a global redesign that references its heritage and helps it stand out from the crowd.

We've also proven our commitment to continuing to grow in a sustainable way. The next chapter in this report outlines how Britvic is continuing to focus on its Healthier People, Healthier Planet strategy through a wide range of initiatives, including our ongoing calorie-

reduction efforts, development of drinks with functional health benefits and efforts to cut our reliance on fossil fuels, as well as our alignment with the United Nations' Sustainable Development Goals.

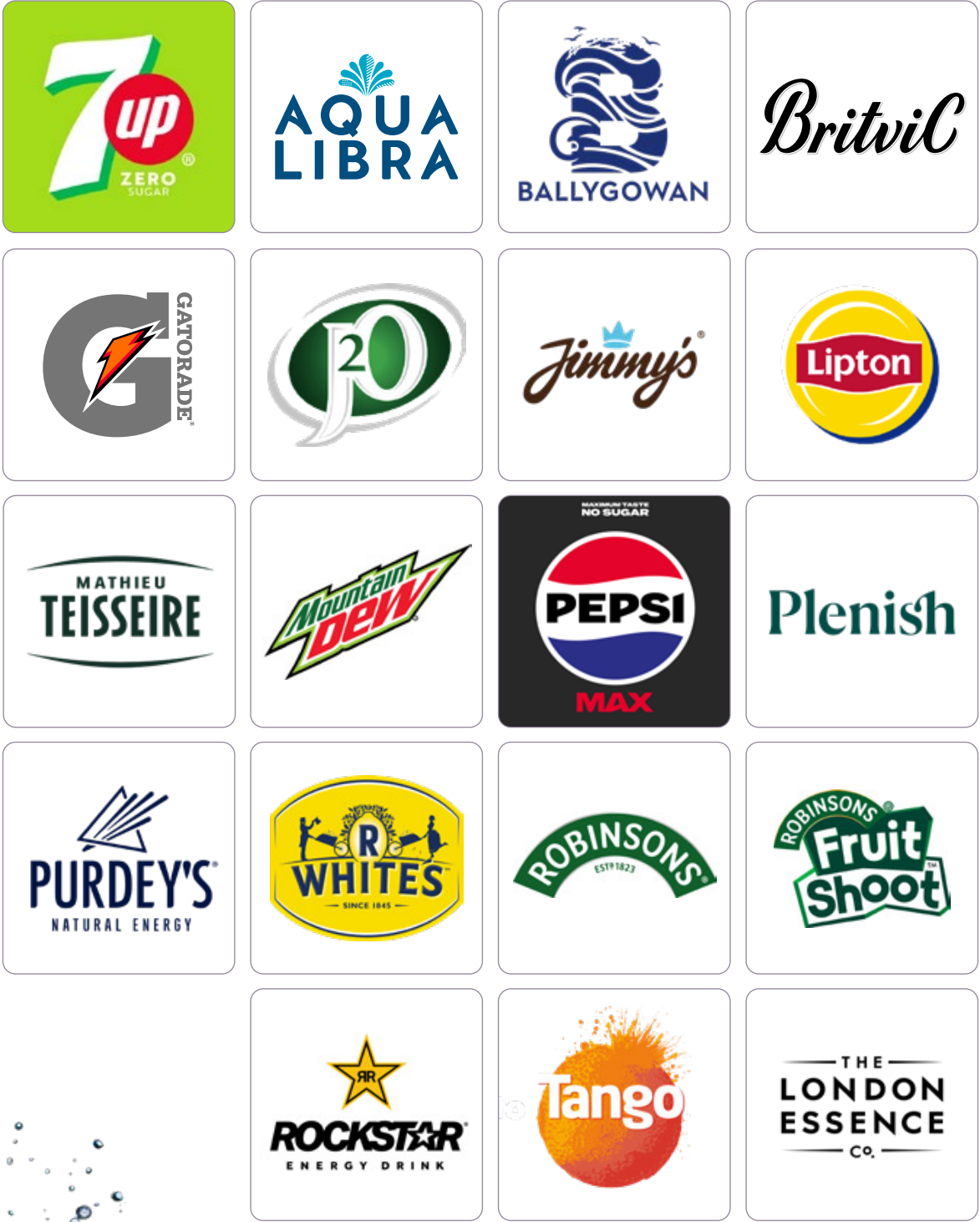
After that, we delve into the dynamics that have been shaping the soft drinks market over the past year, as well as the initiatives of Britvic, our partners, and our peers. We then dig deeper into specific categories and our strategies for unlocking further growth, including our latest innovations, marketing campaigns and merchandising and promotional initiatives.

Despite the uncertainty that exists in the world today, we are looking forward with a sense of renewed strength and optimism. We look forward to continuing to grow one of FMCG's most exciting and vibrant categories and helping people enjoy life's everyday moments. We'll be crossing our fingers for a little more normality; our soft drinks, however, will always be extraordinary.



Kind regards
Paul Graham
Managing Director





Sustainability

Healthier People, Healthier Planet

It's fewer than 50 years since the word *sustainability* was first used in the sense that most people use it today; in short, to “describe human activity in which environmental degradation is minimised”.¹ The soft drinks industry takes this seriously. We are all working towards ambitious targets.

Sustainability shouldn't only be seen in the context of the planet and the creatures humanity shares it with, however. It's widely accepted that sustainability should also be seen in relation to the health of people. “Health and sustainability are mutually enabling and constraining,” state the authors of one influential study.² Healthy people need a healthy planet, and vice versa. The forementioned study recommends the integration of health and sustainability initiatives.

That's what we've done. At Britvic we use the phrase *Healthier People, Healthier Planet* to encapsulate our approach to sustainability. We're proud to be working with our peers across the industry to aim to reduce our impact on the environment and help improve people's health. But what does that mean in practice? And what progress has been made over the past year?



¹ OED - https://www.oed.com/dictionary/sustainable_adj

² Health Promotion International, 8 January 2013 - <https://academic.oup.com/heapro/article/29/3/558/754800>



Healthier people

We're going to start with the people part of the equation, partly because social and economic aspects are often overlooked when it comes to sustainability. Any organisation that's serious about being sustainable must consider these factors in conjunction with the environment. We see helping people live healthier, happier, more fulfilling lives as one of our key duties.

This work takes many forms. At Britvic we have made significant progress in terms of cutting the amount of sugar our products contain. Each 250ml serve we produce in Great Britain contains an average of 12.5 calories³. Globally, that figure stands at 22 calories⁴, meaning that we have already beaten our target of cutting calorie count to fewer than 30 per serve by 2025.

Our peers are also cutting calories. Coca-Cola Europacific Partners (CCEP) cut the sugar content of the drinks it sells across Europe by 4.7% against a 2019 baseline in 2023.⁵ Last year, 48.4% of CCEP drinks sold in Europe were low or no calorie.⁶ Suntory Beverage & Food GB&I says it's on course to have doubled its volume of drinks containing 5g of sugar or fewer per 100ml by 2025 (versus 2015).⁷

Of course, helping people get healthier relies on more than cutting sugar content. We can also fortify with ingredients that offer functional health benefits, such as vitamins or minerals. The imperatives for this are commercial as well as ethical. Nearly half of people say they would prefer to boost their vitamin intake through the food and drink they consume rather than supplements.⁸

Britvic is meeting growing demand for healthier drinks and investing in its wellness brand portfolio. In 2024, we extended our Plenish range with the additions of Plenish Mango Sunshine and Beet Balance, With Mango Sunshine offering 100% of the recommended intake (RI) of vitamin D and Beet Balance designed to support overall women's health with 100% RI of vitamin B6, the two new additions give shoppers even more choice to proactively support their health. The flavours will join Ginger Immunity, Berry Gut Health, Turmeric Recovery and Spirulina Detox, ensuring consumers have a daily shot for a variety of health needs.

There are many more examples of the vibrancy of the wellness drinks space right now. Brands like Hip Pop and Remedy helped fuel kombucha's strong growth in 2023,⁹ as more people picked up the fermented tea for its purported gut health benefits and naturally low sugar content. Retailers see this as a growing opportunity. Tesco has introduced functional health drinks bays, stocking CBD drinks brand Goodrays and vitamin drinks from VitHit alongside kombucha brands Nexba and Remedy.¹⁰



³ <https://www.britvic.com/media/krpdotmg/britvic-annual-report-and-accounts-2023.pdf>

⁴ https://www.britvic.com/media/do0hc0p2/britvic-plc_sustainability-performance-datasheet-2023.pdf. The 2023 figure was independently assured by Deloitte LLP for 2023. Basis of reporting, plus assurance report from Deloitte

⁵ Coca-Cola Europacific Partners - <https://www.cocacolaep.com/sustainability/this-is-forward/forward-on-drinks/#:~:text=We'll%20aim%20for%2050,options%20via%20our%20menu%20deals.>

⁶ Coca-Cola Europacific Partners - <https://www.cocacolaep.com/sustainability/this-is-forward/forward-on-drinks/#:~:text=We'll%20aim%20for%2050,options%20via%20our%20menu%20deals.>

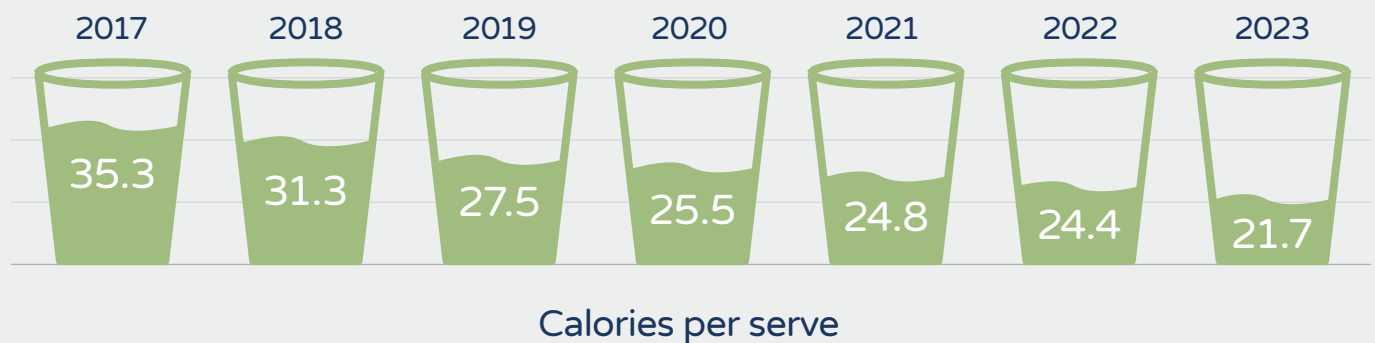
⁷ Suntory Beverage & Food GB&I - <https://www.suntorybeverageandfood-europe.com/en-GB/gbi/sustainability/products/>

⁸ Xampla/The Grocer - <https://www.thegrocer.co.uk/opinion/functional-food-and-drink-claims-must-stand-up-to-growing-scrutiny/676207.article>

⁹ NielsenIQ 52 w/e 7 October 2023 - The Grocer - <https://www.thegrocer.co.uk/category-reports/is-booch-about-to-boom/686297.article>

¹⁰ The Grocer - <https://www.thegrocer.co.uk/soft-drinks/tesco-rolls-out-functional-bays-for-kombucha-and-cbd-drinks/690019.article>

Cutting calories¹¹



Clearly, wellness doesn't only relate to physical health. Mental wellbeing and social inclusivity are also crucial. We are taking steps to promote these both within our organisation and in wider society. For example, in September 2023, Tango entered its second year of partnership with youth charity, The Prince's Trust, to help young people develop essential life skills and access job opportunities.

We're committed to changing this. In May 2023, we announced a multi-year partnership with the wellbeing charity, Bounce Forward, which included our employees nominating almost 150 schools in their home communities to receive fully funded support from the organisation to support pupils' mental resilience and emotional wellbeing.

In the first year of the partnership, Tango donated £100,000 to the Trust to help empower young people with the skills and knowledge to allow them to find work and build brighter futures. In the partnership's second year, which was ushered in with an event hosted by YouTuber and musician Yung Filly, Tango will donate a further £120,000 to support the charity.

Research for Britvic in 2023 also shone a light on the need for greater emotional support in schools. Three in five (58%) parents say they are concerned about their child's mental resilience and emotional wellbeing; and 81% believe mental health should be on the curriculum in primary and secondary schools.¹² Only 33% of teachers say they have the skills to support children with issues around mental wellbeing.¹²



¹¹ https://www.britvic.com/media/do0hc0p2/britvic-plc_sustainability-performance-datasheet-2023.pdf

¹² Opinion poll for Britvic and Bounce Forward - 6 April to 17 April 2023; 2,000 UK parents with children at primary or secondary school; 326 teachers of children at primary or secondary schools

Levelling the field

Despite the progress of recent decades in addressing social inequalities, society still has a long way to go before the field is levelled. So does the food and drink industry: between 2009 and 2019, 42% of venture capital funding in the sector went to firms founded by people from “elite educational backgrounds” – just 2.3% went to all-female teams and only 0.3% went to Black-owned start-ups.¹³

The industry is helping to redress the balance. Sainsbury's, for example, is running the Thrive with Sainsbury's incubator scheme, which offers funding, support and mentorship for Black-led food and drink businesses. In February 2023, it announced the first three businesses to have won a listing at the retailer as part of the scheme.¹⁴

Further examples from the past year include Deliveroo and its restaurant partners' campaign with charity, Albert Kennedy Trust to support vulnerable LGBTQIA+ people facing homelessness, Lidl's sponsorship of Birmingham Pride 2023 (complete with a Lidl Pride bus on which staff members rode) and Ocado's decision to join the Career Accelerator LGBTQIA+ business mentoring programme.¹⁵

At Britvic, we believe we all have a part to play in making the world a more equal and inclusive place. And not just because it's the right thing to do; by ensuring people from all backgrounds and of all points of view are included in all aspects of life, we all stand to benefit.



Our work with the National Autistic Society to support the launch of Robinsons Fruit Shoot's easier to recycle sports caps in 2024 is also pertinent. We developed videos, storyboards and online materials with the National Autistic Society to help neurodivergent children and their families manage the transition to the new cap. We targeted autism-related media, parenting publications and influencers to explain the changes, raise awareness of the challenges faced by those with autism and show how brands can support this community.

The campaign was a huge success, achieving an earned media reach of more than 1.5 million people and a social media reach of 4 million people. Internally, Britvic continues to develop and expand neurodiversity training and continue its commitment to develop inclusive marketing campaigns that resonate with diverse consumer groups, including the neurodivergent community.

¹³ The Grocer - <https://www.thegrocer.co.uk/saturday-essay/why-is-food-and-drink-innovation-only-accessible-to-the-privileged-few/678675.article>

¹⁴ The Grocer - <https://www.thegrocer.co.uk/buying-and-supplying/sainsburys-thrive-scheme-lists-its-first-black-founded-brands/676106.article>

¹⁵ The Grocer - <https://www.thegrocer.co.uk/marketing/15-ways-supermarkets-and-grocery-are-celebrating-pride-month/679697.article>



Thankfully, we're not alone in working to make the world a more inclusive, happier place. Coca-Cola GB, for example, was official sponsor of Pride in London and Brighton Pride in 2023 and teamed up with Gay Times to create Breakthrough with Coke Studio, a campaign giving unsigned LGBTQIA+ musicians the chance to gain the recognition and support they deserve. Coca-Cola is also working with myGwork, the business community for LGBTQIA+ professionals and inclusive employers.

At Britvic, we share these values and are working hard to maintain and build an inclusive culture that embraces all, prioritises wellbeing and rewards dynamism. Examples of how we are doing this can be seen in the work that we're doing with network groups such as B-Proud, which connect and support LGBTQIA+ employees and straight allies throughout our organisation, and B-Seen, which is focused on attracting, retaining and championing employees with disabilities and diverse abilities.

We're also continuing to focus on helping young people build brighter futures by investing in internships, apprenticeships and graduate schemes. Through our partnerships with Solihull College and the charities upReach and KARE Ireland, we are offering a variety of workplace opportunities to people with disabilities and diverse abilities and those from disadvantaged backgrounds. This year, we welcomed seven upReach students to shadow our employees in a variety of roles.¹⁶

To ensure employees feel energised and happy and encourage dialogue about how our organisation evolves, we conduct anonymous employee surveys. Our engagement scores are stable, high and consistently above global benchmarks, standing at 78 in 2023.¹⁷ This indicates that Britvic is a happy, inclusive and engaging place to work where people feel a sense of belonging.



¹⁶ Britvic Job Experience for Students with Special Education Needs - Solihull College & University Centre

¹⁷ Employee Heartbeat is a twice yearly employee survey, providing us with valuable insights on employee engagement, what works well in the organisation, and what we can improve. Employees respond to statements on a five point scale ranging from strongly disagree to strongly agree. Their individual responses are then converted to a number on a rating scale going from 0 (strongly disagree) through 25, 50 and 75 to 100 (strongly agree). The overall score shown is the average of all these ratings

Championing diversity

At Britvic we believe that diversity makes us stronger. That's why we've created five diversity network groups to support colleagues from all backgrounds and of varying abilities.



B-Diverse promotes increased racial, ethical and cultural diversity in the business and supports Black, Asian and ethnically diverse employees in bringing their true selves to work.



B-Seen is passionate about Britvic attracting, retaining and championing employees with disabilities and diverse abilities.



B-Empowered champions gender equality and gender parity. It supports the attraction, development and retention of great female talent.



B-Proud connects and supports LGBTQIA+ employees and straight allies.



B-Well is the name we give our supportive network of Mental Health First Aiders and Wellbeing Warriors. Its aim is to bring together the various support programmes that exist in Britvic, to create the conditions for a healthier and caring work environment, in which we all feel supported and understood. B-Well offers a guiding hand to anyone who may be struggling with mental, emotional or physical wellness issues, as well as being here to help us all manage our energy and recovery in building resilience to cope with life's everyday challenges.



Healthier planet

Healthier people need a healthy planet. At Britvic, we're committed to achieving net zero carbon emissions by 2050, in line with global efforts to restrict global temperatures rising by no more than 1.5°C. We were the first UK soft drinks producer to have this goal approved by the Science Based Targets initiative. So far, we've cut our Scope 1 and Scope 2 market-based emissions by 32.6% since 2017.¹⁸

We're continuing to make progress. With the support of the Department for Energy Security and Net Zero's Industrial Energy Transformation Fund (IETF), we invested £8m in a heat recovery system at our Beckton site (the IETF provided approximately half of this funding). This will cut emissions by an estimated 1,200 tonnes a year – about the same amount as the energy used by 11,500 homes a year.¹⁹

Last year, we worked with solar energy provider Atrato Onsite Energy and Squeaky Energy, to generate and deliver clean energy exclusively for our sites in Great Britain via a 10-year agreement. This agreement covers 75% of the electricity Britvic gets from the National Grid in Great Britain – powering current operations, including its Beckton and Leeds factories, which can produce 2,000 recyclable bottles per minute.

We want to continue to invest in renewable energy sources and energy efficiency projects, to reach net zero throughout our operations, as well as stepping up efforts to become more efficient in terms of packaging and water use and protecting biodiversity.²⁰

Britvic has teamed up with The Rivers Trust to fund wetland restoration projects and using our volunteer days to support litter picks, clearing rivers and tree planting. In 2023, our employees in Great Britain and Ireland contributed more than 6,300 hours to community causes, including those aimed at protecting and improving the natural environments and biodiversity.²⁰

As a business that primarily relies on sales of packaged soft drinks, we continue our support for the roll out of a UK-wide deposit return scheme (DRS), a move that will increase recycling rates, reduce littering and ensure greater availability of quality recycled PET plastic. We welcomed the April announcement that a nationwide DRS will go live across England, Scotland, Northern Ireland and Wales in October 2027. This is a crucial step in building a truly circular economy in which packaging never becomes waste.



¹⁸ <https://sciencebasedtargets.org/target-dashboard>;

Britvic plc Sustainability Performance Datasheet 2023

¹⁹ IETF Phase 2, Autumn 2021: competition winners - GOV.UK (www.gov.uk)

²⁰ Britvic plc Sustainability Performance Datasheet 2023- 788 volunteering days as taken by Britvic employees. Assuming an eight hour working day: 788 x 8 = 6,304 hours

DRS: Lessons from the Emerald Isle

As UK governments and the industry continue to work towards the introduction of a deposit return scheme (DRS) on drinks packaging, Britvic is proud to have been part of a cross-industry board that oversaw the February 2024 launch of DRS over in Ireland.

The scheme covers plastic bottles and aluminium and steel drinks cans and has seen more than 2,000 reverse vending machines installed in supermarkets, convenience stores and forecourts across the country.

Shoppers pay deposits of between €15 and €25 on drinks, which can be redeemed for food and drink vouchers in store.

The aim of the scheme is to increase Irish recycling rates, which was estimated to be between 60% and 70% pre-DRS, to 77% for plastic bottles by 2025 and 90% to 2029.²¹ So far, the scheme has been heralded a roaring success, with more than 20 million containers returned via the DRS by the beginning of April.²²



Meanwhile, we continue to make strides to offer a range of packaging formats. To this end, in January, we launched plain Aqua Libra Still and Sparkling water in 330ml infinitely recyclable aluminium cans. Aqua Libra continues to reinvent hydration, with having served in excess of 1 million serves in just 18 months through the innovative dispense system, The Flavour Tap.³

Through our partnership with environmental services company, Ocean Co, we are supporting projects that create the most impact for communities across the globe, clearing rivers and waterways and collecting plastic to be recycled, upcycled or co-processed through a fully traceable system.

²¹ The Grocer: <https://www.thegrocer.co.uk/deposit-return-schemes/inside-irelands-new-deposit-return-scheme/687901.article#:~:text=Recycling%20rates&text=As%20a%20result%2C%20DRS%20is,works%20for%20three%20years%20now.>

²² <https://dublingazette.com/dublinlocalmatters/news/deposit-return-cans-55533/>

²³ Total serves of Flavour tap through data collected 1/1/23-8/5/24



Another way we're working to reduce packaging waste includes the accelerated roll out of London Essence Company's Freshly Infused founts in pubs and restaurants. This system can yield a reduction in drinks packaging of 99% for our partners, which reduces our water usage and haulage space for transportation.²⁴ Highly concentrated squashes and syrups, such as super strength Robinsons in innovative 89% plant-based packaging concept, Ecopack, is another example of how we're reducing packaging waste.

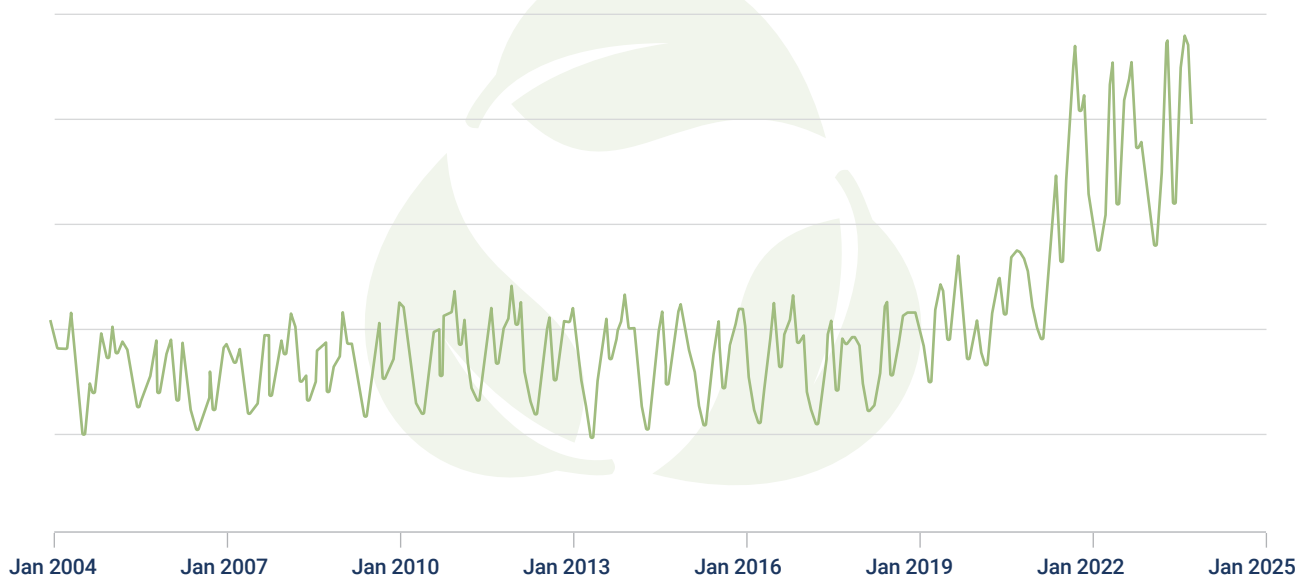
Sustainability is a growing concern for everyone. We will continue to strive to make our operations more sustainable and share stories of the steps we are taking to our consumers, growing numbers of whom are affiliating themselves with brands that represent their values and abandoning those that don't.²⁵ Over the coming chapters, we will share stories of other ways we're engaging with shoppers and driving growth for our partners.



Searching for sustainability

Sustainability matters. Growing concern is illustrated by the surge in Google searches for the term over the past two decades. Searches have peaked in the past three years²⁶ as evidence of the toll humanity is taking on the planet and discourse around the need for change at a global level have mounted.

Interest over time²⁶



²⁴ Based on 1000 cases of LEC NRB Tonic water transitioning to dispense- equal to reduced packaging of 4.6 tonnes

²⁵ Mintel 2024 Global Consumer Trends - https://insights.mintel.com/rs/193-JGD-439/images/Mintel_2024_Global_Consumer_Trends_English.pdf?mkt_tok=MTkzLUpHRC00MzkAAAGPuzHpdt90_082JTAJCI7YNUncIkZbZhvTYJ4c2DzBqE1xyLSSYLfs-X9owpyW5hk8TE1iUOWHa59GIPazrFhqJfHv-BJCJzwKotRX8tHtEB7o

²⁶ <https://trends.google.com/trends/explore?date=all&geo=GB&q=sustainability&hl=en>

Category overview

Performing under pressure

Put enough pressure on anything for long enough and it will change. The past year has shown how this law of physics applies to food and drink. Last February, inflation hit a height not seen since the 1970s¹, and prices continued to rise (although at a falling rate) throughout 2023.² As a consequence, people have reined in spend and volumes have fallen for many categories.³

Despite this pressure, soft drinks have performed well. Overall sales of soft drinks through the UK's out-of-home outlets, supermarkets, convenience stores and discounters grew by 6.5% to just over £20.3bn; volumes slipped by 1.5%.⁴ After the wild swings in sales seen since 2020, this represents a resumption of business as usual for the category.



¹ ONS - <https://www.ons.gov.uk/economy/inflationandpriceindices/bulletins/consumerpriceinflation/february2023>

² ONS - <https://www.ons.gov.uk/economy/inflationandpriceindices/articles/costoflivinginsights/food>

³ The Grocer – Top Products - <https://www.thegrocer.co.uk/reports/rankings/top-products>

⁴ NielsenIQ RMS - 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 vs a year ago



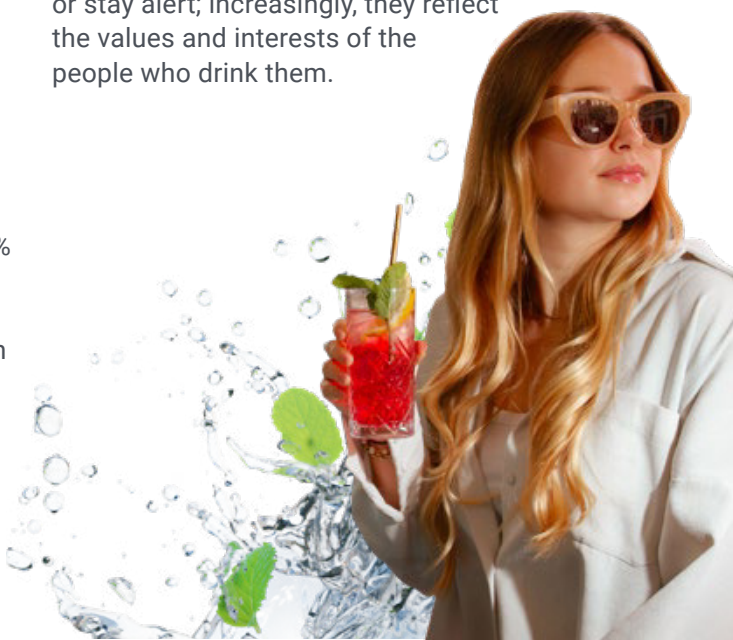
Well, almost. Beneath the headline figures, significant changes are still taking place. With disposable incomes being squeezed hard by inflation, soft drinks volumes saw sharp declines in grocery multiples (down 3.7%)⁵ and licensed venues (down 3.5%)⁶ throughout the year as people switched to cheaper outlets and went out to eat and drink less often. Recent months have been more positive, with grocery volumes growing in 2023's final quarter and volume growth returned to a positive 2.4% in the first quarter of 2024.⁷

The discounters and foodservice – particularly fast food operators – have benefitted most. Soft drinks volumes have grown in these channels by 4.6%⁵ and 0.8%⁶ respectively. While convenience and impulse retailers have seen soft drinks volumes slip by 1.8%,⁵ the category is still fuelling strong growth for petrol forecourts, where soft drinks sales have grown by 9.9% on volumes up 1.6%.⁵

These performances take on a different light when seen in a wider context. As we explored in the 2023 Britvic Soft Drinks Review, category sales boomed in grocery and convenience during the turmoil of Covid and out-of-home saw strong growth as pubs and restaurants

reopened after the pandemic. Crucially, soft drinks value sales are 12.6% higher than they were in 2019 and 3.7% higher in volume⁸.

This is testament to the resilience and ingenuity of producers and retailers, as well as the increasingly diverse roles soft drinks play in people's lives. Soft drinks can be affordable treats, refreshing pick-me-ups and sophisticated alternatives to alcohol. They can help enable a more balanced lifestyle, help people calm down or stay alert; increasingly, they reflect the values and interests of the people who drink them.



Channel hopping⁹

Total soft drinks
£20.3bn, +6.5% value change, -1.5% volume change

Discounters	Convenience & impulse	Grocery multiples	Foodservice outlets	Licensed outlets
£1.2bn	£4.2bn	£7.2bn	£3bn	£4.6bn
Value % change 17.5	Value % change 10.3	Value % change 7.4	Value % change 4.0	Value % change 1.4
Volume % change 4.6	Volume % change -1.8	Volume % change -3.7	Volume % change 0.8	Volume % change -3.5

⁵ NielsenIQ RMS, Total Soft Drinks, Value and Volume Sales, grocery, impulse & convenience and discounters, 52 w/e to 30th Dec 2023

⁶ CGA by NielsenIQ RMS – out of home data, Total Soft Drinks, Value and Volume Sales, 52 w/e 30.12.23

⁷ NielsenIQ RMS, Total Soft Drinks, grocery, impulse & convenience and discounters, volume sales, 12 w/e to 30th March 2024

⁸ Kantar Worldpanel - Combined TH & OOH Purchase Panel data - Total Soft Drinks 52we 22.01.2023 Vs 27.01.2019

⁹ NielsenIQ RMS - 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 vs a year ago

Pulling power

The fact that discounters have seen the strongest growth of any retail channel¹⁰ is not surprising, given the current economic climate. By November 2023, 56.6% of UK consumers reported being moderately or severely affected by the soaring cost of living, up from 53.6% in November 2022.¹¹ The number of people reporting being severely affected rose from 11.4% to 14.4% during this period.¹²

The financial pressure people are under is impacting the out-of-home market as well as retail. In November 2023, 32% of people said they were going out to eat and drink less often because of concerns about the cost-of-living crisis.¹³ As we've seen, the UK's pubs, bars and restaurants have borne the brunt of this, while fast food operators have proven more resilient.

It's crucial that all operators are seen to be offering value. The number of people who identify as being value-led inched up from 75.7% in 2022 to 76.3% last year.¹⁴ As we explore in later chapters, this fact hasn't been missed by retailers or licensed and foodservice operators, all of whom are upping their efforts to keep people coming through their doors with meal deal promotions and loyalty schemes.

Operators increasingly recognise that the soft drinks they stock help determine people's choice of store or venue. That's why Britvic has launched ready-to-drink versions of Tango Ice Blast flavours, Raspberry Blast and Cherry Blast, exclusively into the convenience channel. But bold flavours, striking colours and eye-catching packaging aren't the only ways to attract shoppers.

Despite growing value consciousness, 86% of people still think that good quality has a price and 73% of people are happy to pay more for higher quality.¹⁴ Clearly, value means different things to different people, whether it's a sophisticated mocktail or house cooler served at their favourite bar or the latest offering from a social media sensation. People are still prepared to pay for drinks that tick their boxes.

Just look at the frenzied scenes¹⁵ at stores that were stocking the latest Prime Hydration launches in 2023 for further proof of the remarkable pulling power of soft drinks. Despite a fall in sales for Prime in 2024,¹⁶ retailers are still banking on the brand to create a buzz. Iceland, for example, was keen to spread the word when it became the first UK stockist of Prime Banana & Strawberry in April.¹⁷



10 CGA by NielsenIQ RMS - out-of-home 52 w/e 31.12.23

11 NielsenIQ RMS Homescan Survey - November 2023 - Question: How much is the cost-of-living crisis impacting you at the moment?

12 NielsenIQ RMS Homescan Survey - November 2023 v November 2022 - Question: How much is the cost-of-living crisis impacting you at the moment?

13 NielsenIQ RMS and CGA by NielsenIQ Homescan Survey - November 2023

14 Lumina Intelligence Eating & Drinking Out Panel 52 w/e 25.12.22 v 52 w/e 24.12.23

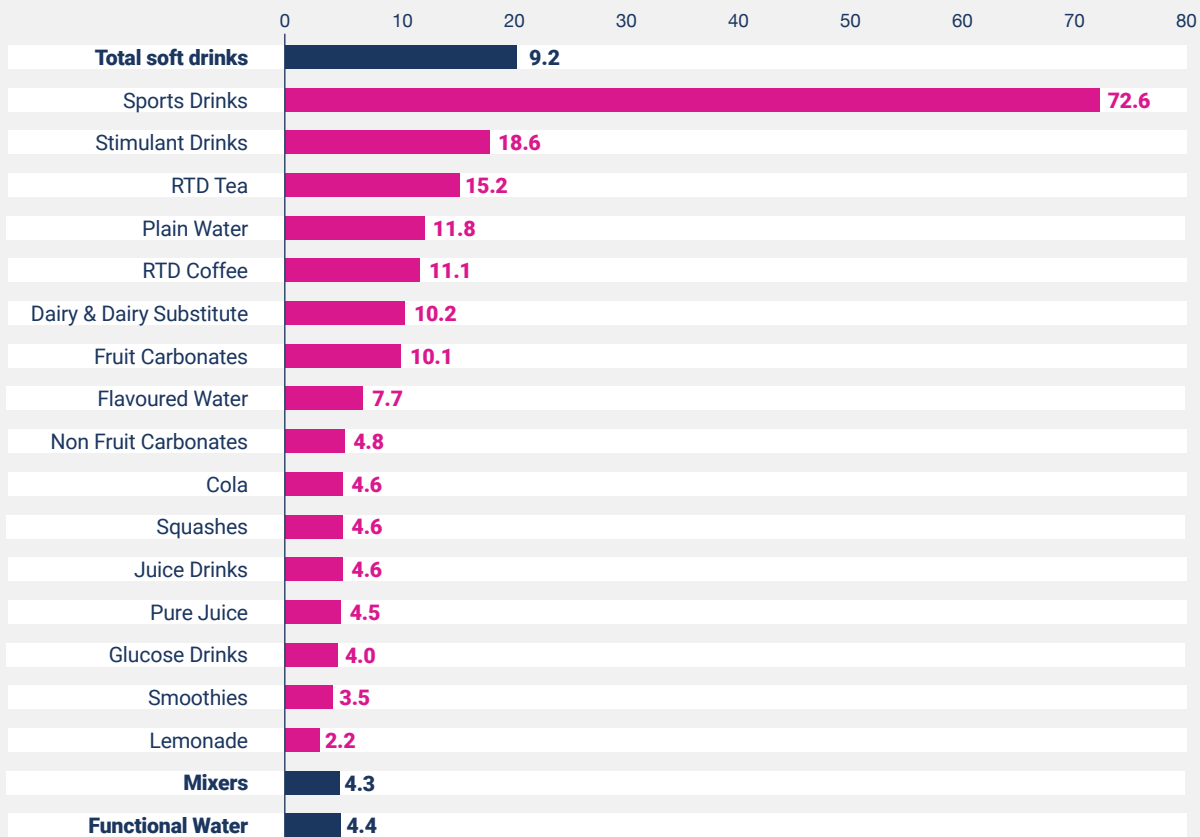
15 The Grocer - <https://www.thegrocer.co.uk/aldi/prime-hydration-drink-back-in-aldi-stores/678341.article>

16 The Grocer - <https://www.thegrocer.co.uk/soft-drinks/prime-sales-in-freefall-with-bottles-reduced-in-tesco-to-just-31p/689987.article>

17 Grocery Gazette - <https://www.grocerygazette.co.uk/2024/04/02/prime-strawberry-iceland/>

Soft drinks sales growth: sector by sector¹⁸

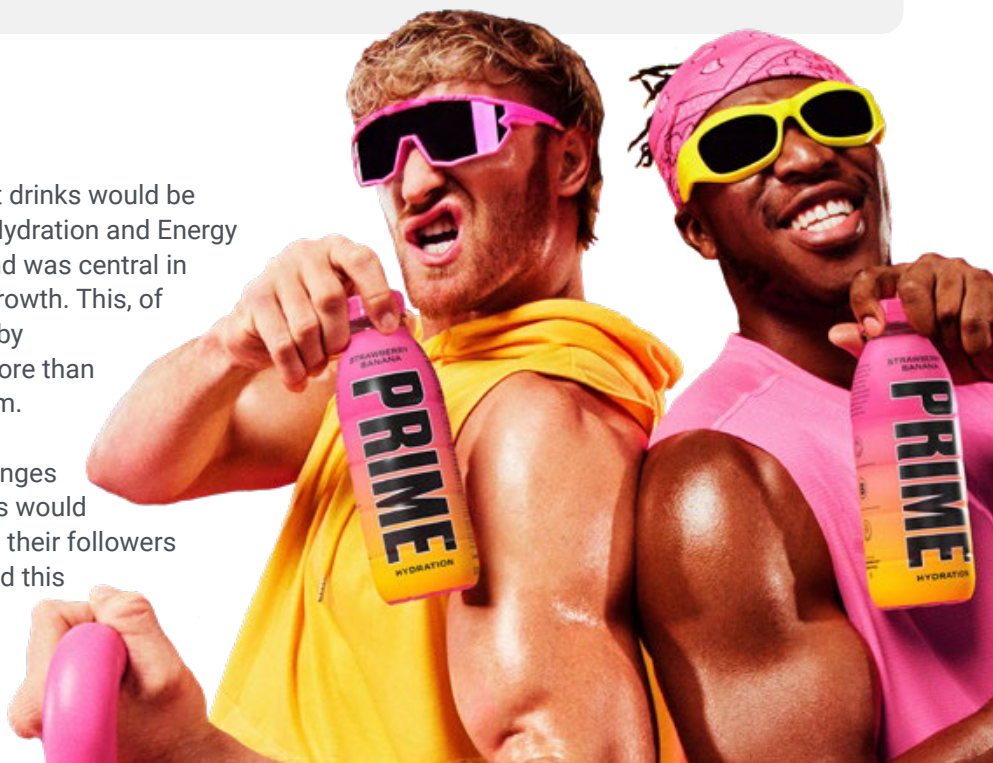
Value % change



Prime numbers

Any discussion about the past year for soft drinks would be incomplete without mention of the Prime Hydration and Energy lines. Prime racked up £55.7m in 2023¹⁹ and was central in driving the sports drinks category's huge growth. This, of course, is thanks to the hype driven online by founders, KSI and Logan Paul, who have more than 60m subscribers on YouTube between them.

The rise of Prime reflects fundamental changes to the world of branding. In the past, brands would recruit celebrities in the hope of converting their followers into buyers. KSI and Logan Paul have turned this upside down. They are the brand. Prime took 1.3% of soft drinks value in grocery, convenience and discounters in 2023.²⁰ However, share has fallen to 0.5% since the start of 2024.²¹



¹⁸ NielsenIQ RMS - 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 vs a year ago

¹⁹ Circana Total Convenience, Total Soft Drinks, Value growth YoY, 52WE 31.12.23

²⁰ NielsenIQ RMS - Total Coverage Inc. Discounters, Total Soft Drinks, Value share of sales, Calendar year 2023 w/e 30.12.2023

²¹ NielsenIQ RMS - Total Coverage Inc. Discounters, Total Soft Drinks, Value share of sales, Latest 12 weeks to 30.03.2024

Having said that, many established FMCG brands could still learn a lot from Prime about creating a buzz online with a steady flow of new products. After all, seven of the top 20 soft drinks launches in 2023 were from Prime.²² And it doesn't stop there. Prime clearly has big ambitions, having registered its logo against beers, wines and spirits, vaping equipment and CBD preparations with the UK Intellectual Property Office in 2023.²³

Limited editions have gained currency among established brands too. Limited Edition Tango Sugar Free Paradise Punch, for example, racked up sales of £4.2m²² after launching in February 2023. What's crucial is that such products drive incremental growth and shoppers continue to buy once the novelty has worn off.



Rockstar Energy® to rock six UK festivals

Rockstar by name; Rockstar by nature! In April, Rockstar Energy® signed a multi-year partnership with Live Nation, organiser of the Reading, Leeds, Parklife, TRNSMT, Creamfields and Wireless music festivals. This marks the next phase of the brand's musical journey, which saw the launch of the Rockstar Energy® Press Play platform and activations with artists including Stormzy and Raye in 2023.

For the first time, Live Nation will welcome one headline partner across the six UK festivals, with the name of each featuring the tag "Rockstar Energy® Drinks Presents..." The partnership will include on-pack promotional Rockstar Energy® VIP Wristbands on selected cans, offering a range of special prizes and perks, including festival and concert tickets, queue jumps and backstage passes.

Festival-goers will be able to grab rapid energy boosts from Rockstar Energy® sampling points at each of the six festivals this summer, helping to enhance the festival experience while cementing the brand's appeal with consumers, particularly those belonging to Generation Z (people born between 1997 and 2010), who are most likely to frequent festivals.²⁴



²² Circana Total Convenience, Total Soft Drinks, Value Sales, 52WE 31.12.23

²³ The Grocer - <https://www.thegrocer.co.uk/new-product-development/prime-planning-extensions-into-vaping-cbd-booze-and-more/686445.article>

²⁴ Pew Research Centre - Defining generations: Where Millennials end and Generation Z begins, 17/01/2019 <https://www.pewresearch.org/fact-tank/2019/01/17/where-millennials-end-and-generation-z-begins/>

Jimmy's joins Britvic

Britvic entered the booming Ready-to-Drink Coffee market in July 2023 with the acquisition of Jimmy's Iced Coffee. In a category that is now growing at 10.4%,²⁵ Jimmy's Iced Coffee is the perfect fit for Britvic, completing our quartet of energy-boosting drinks, which includes power boosts in the shape of Rockstar Energy® and Purdey's Natural Energy Drinks, as well as plant-powered pick-me-ups with Plenish Health Shots.

Since adding Jimmy's to our portfolio, we've boosted the brand's functional credentials with the addition of two new products in collaboration with Myprotein. Available in Original Iced Coffee and Caramel Iced Coffee, the co-branded Myprotein lines pack 5.6 grams of protein per 100ml and have been designed to help convenience retailers cash in on growing demand for protein-enriched drinks.



Why health and product quality still matter

Drumming up excitement with new flavours, celebrity partnerships and store exclusives isn't the only way to drive growth in soft drinks, of course. Demand for premium soft drinks and those that offer additional health benefits or reduced sugar content continues to surge, fuelling growth for a range of Britvic brands including London Essence Company, Plenish and Pepsi MAX®.²⁶

Research shows that the importance of health to people when they're choosing what to eat or drink is partly informed by how confident they're feeling about their finances.²⁷ However, although recent economic shocks have dragged down the number of food and drink products consumed for health reasons, one in five soft drinks is still consumed on health grounds.²⁶

What's more, in each of the final four months of 2023, the importance of health consistently grew. More people bought items for health benefits such as added vitamins and minerals, natural or less processed credentials, or to get one of their five a day.²⁸ This is benefitting soft drinks categories such as plain and infused water, health shots and natural energy drinks.

That's not all: the growing numbers who are moderating their alcohol intake bode well for health-orientated, premium soft drinks. Currently, 46% of drinkers say they're trying to consume less alcohol, yet only one in nine say they're doing this by switching to soft drinks²⁸.

This presents businesses like ours, and the partners we supply, with more opportunities. Read on to discover how we're unlocking them...



²⁶ NielsenIQ RMS - grocery, impulse & convenience and discounters 52 w/e 30.12.23

²⁷ Kantar Usage - total soft drinks 52 w/e 26.12.23

²⁸ Kantar Usage Panel - total food and drink; health needs and servings versus previous year; 12 w/e periods

The year in numbers

£438.7m

of soft drink sales added to convenience in 2023¹

The category is now valued at

£3.3bn²



15.3%

total soft drinks value sales growth in 2023¹

Symbols & Independents saw the fastest value growth

(+16.8% YoY)

adding over

£362.2m to convenience³



Petrol & Travel grew the 2nd fastest

(+14.4%)

adding over

£64.1m

in value sales YoY⁴



Sports drinks was the winning segment in 2023, with value growth of

+64.6% YoY adding

£75.3m

to convenience⁵

The top five soft drink segments in convenience are⁶

1 Stimulants

2 Cola

3 Fruit carbs

4 Plain water

5 Sports drinks

¹ Circana, Total Convenience, Total Soft Drinks Britvic Defined, Value growth YoY, 52WE 31/12/2023

² Circana, Total Convenience, Total Soft Drinks Britvic Defined, Value sales, 52WE 31/12/2023

³ Circana, Symbols & Independents, Total Soft Drinks Britvic Defined, Value & £PPL growth YoY, 52WE 31/12/2023

⁴ Circana, Petrol & Travel, Total Soft Drinks Britvic Defined, Value growth YoY, 52WE 31/12/2023

⁵ Circana, Total Convenience, Total Soft Drinks by Segment Britvic Defined, Value growth YoY, 52WE 31/12/2023

⁶ Circana, Total Convenience, Total Soft Drinks by Segment Britvic Defined, Value sales, 52WE 31/12/2023

The top five largest soft drink segments added

£394.7m

to the convenience channel in 2023⁷



The top three soft drink manufacturers have remained as⁹

Coca-Cola Enterprises

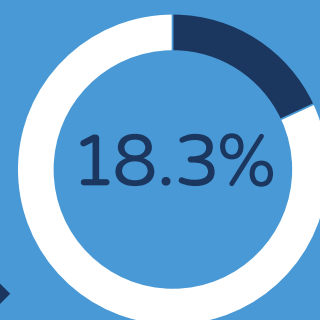
BRITVIC

and



Red Bull

Red Bull has remained the top sub-brand in the convenience channel, with



value growth YoY¹⁰

On-the-go soft drink value sales grew

17.2%

VS 2022 in convenience⁸



Pepsi MAX[®] is still the third biggest sub-brand in convenience, seeing value growth of

13.1%

which equates to

£18.6m¹⁰

New Tango Editions Paradise Punch added

£4.2m

to the convenience channel last year, surpassing Berry Peachy which was the biggest NPD launch of 2022¹



Vs 2022, Total Squash sales inflate to over

£43.1m¹¹

in sales,



⁷ Circana, Total Convenience, Total Soft Drinks by Segment Britvic Defined, Value sales change YoY, 52WE 31/12/2023

⁸ Circana, Total Convenience, Total Immediate Consumption soft drinks Britvic Defined, Value sales growth YoY, 52WE 31/12/2023

⁹ Circana, Total Convenience, Total Soft Drinks by Manufacturer Britvic Defined, Value growth YoY, 52WE 31/12/2023

¹⁰ Circana, Total Convenience, Total Soft Drinks by Super Brand Britvic Defined, Value growth YoY, 52WE 31/12/2023

¹¹ Circana, Total Convenience, Total Squash Britvic Defined, Value growth YoY, 52WE 31/12/2023

Convenience category overview

The unstoppable rise of the kings of convenience



Soft drinks are now bigger than baked goods in convenience retail. They were bought on more occasions than bread loaves and sweet baked items last year for the first time on record.¹ In 2022, soft drinks were bought on 23.6% of trips to c-stores; baked goods were ahead by a whisker at 23.8%.¹ But in 2023, soft drinks surged ahead; bought on 26.1% of trips versus 25% of trips for baked goods.¹

Clearly, this is a milestone for soft drinks producers and the 48,500 convenience retailers operating in the UK today. It also reflects significant and, at times, subtle changes in the way people are living, working and interacting with each other, as well as the economic outlook and values of wider society. So, what's driving this growth and how can convenience retailers continue to benefit from the rise of soft drinks?



¹ Lumina Intelligence Convenience Tracking Programme – 52 w/e 08.01.23 – 07.01.24

Soft drinks sales through c-stores grew by 15.7% to £3.3bn in 2023 alongside encouraging volume and unit growth of 3.3% and 3.0% respectively.² This comes against a backdrop of 4.1% growth to £47.1bn for the convenience channel in 2023 (forecast)⁴. Inflation has played a role in this growth, but so too has investment in store renovation and new store formats capitalising on growth areas including food-to-go, fresh and chilled foods and alcohol. Such activity will help fuel expected compound annual growth for the convenience channel of 2.7% from 2023 to 2026.³

Forecourts are fueling huge growth for the convenience channel. Total sales (of all goods and fuel) through forecourts grew by 2.8% to £4.6bn in 2023 (forecast).⁴ As we explore in the next chapter, alongside inflation, this was driven by rapid transformation of ranges, merchandising, and promotional strategies, the expansion of foodservice into the sector and the rise of electric vehicles. All of this is happening amidst growing

consolidation in the ownership of roadside retail and the expansion of new store formats.

Most key metrics are positive. Average spend per trip has gone up from £6.56 in 2022 to £9.04 in 2023⁵ and the average number of items bought has risen from 2.8 to 3.⁵ Nearly two thirds (60%) of people now use c-stores⁵ but their reasons for doing so are changing. In 2022, a fifth (19.7%) of store visits were to pick up newspapers or magazines; that fell to 15.8% in 2023.⁵ The latest figures show a rise in top up, food-to-go and treat shops.⁵

All this is happening amidst big shifts in the channel's shopper base. Older and less affluent shoppers in the C2, D and E socioeconomic groups are leaving the channel (share is down 4% pts⁶) in search of lower prices.⁶ Younger and more affluent families are increasing share and driving up basket size and spend.⁶ As we're about to explore, all this is driving growth for soft drinks and presenting new opportunities for the category.

Changing channels

All sub-channels saw growth in convenience retail in 2023. Convenience multiples and symbol groups led the pack with respective turnover growth of 6.3% and 4.5% and outlet growth of 4.1% and 2%.⁷

Convenience market value 2023F: £47.1bn (+4.1) and outlets: 48,545 (+1.4)⁴

Unaffiliated independents	Symbol groups	Convenience multiples	Co-operatives	Forecourts
£8.3bn (+2.3%)	£17.6bn (+4.5%)	£9.9bn (+6.3%)	£6.7bn (+2.9%)	£4.6bn (+2.8%)
18,348 (+0.5%)	16,335 (+2.0%)	5,642 (+4.1%)	3,455 (+2.3%)	4,765 (-0.5%)
Inflation is expected to support growth in the independent segment in 2023F as retailers battle inflation, rising costs and value-led shoppers seeking low prices.	The symbol sector is forecast to retain its share boost post pandemic in 2023F as store renovation programs are rolled out for leading groups including Booker.	Convenience multiples are expected to continue to capitalise on value credentials in 2023F, offering shoppers every day low prices and boosting store numbers through transitions.	Co-operatives are forecast to see an up-lift in growth in 2023 as performance post-pandemic normalises. There are strong growth prospects in the expansion of its franchise model.	Forecourt convenience is forecast to see robust turnover growth in 2023F, mostly supported by high inflation as outlet decline continues.

Lumina Intelligence, July 2023

² Circana, Total Convenience, Total Soft Drinks, Value, Vol & Unit, 52WE 31/12/2023 vs. YA

³ Lumina Intelligence Convenience & Wholesale Market Report, July 2023

⁴ Lumina Intelligence Convenience & Wholesale Marketing Report, July 2023

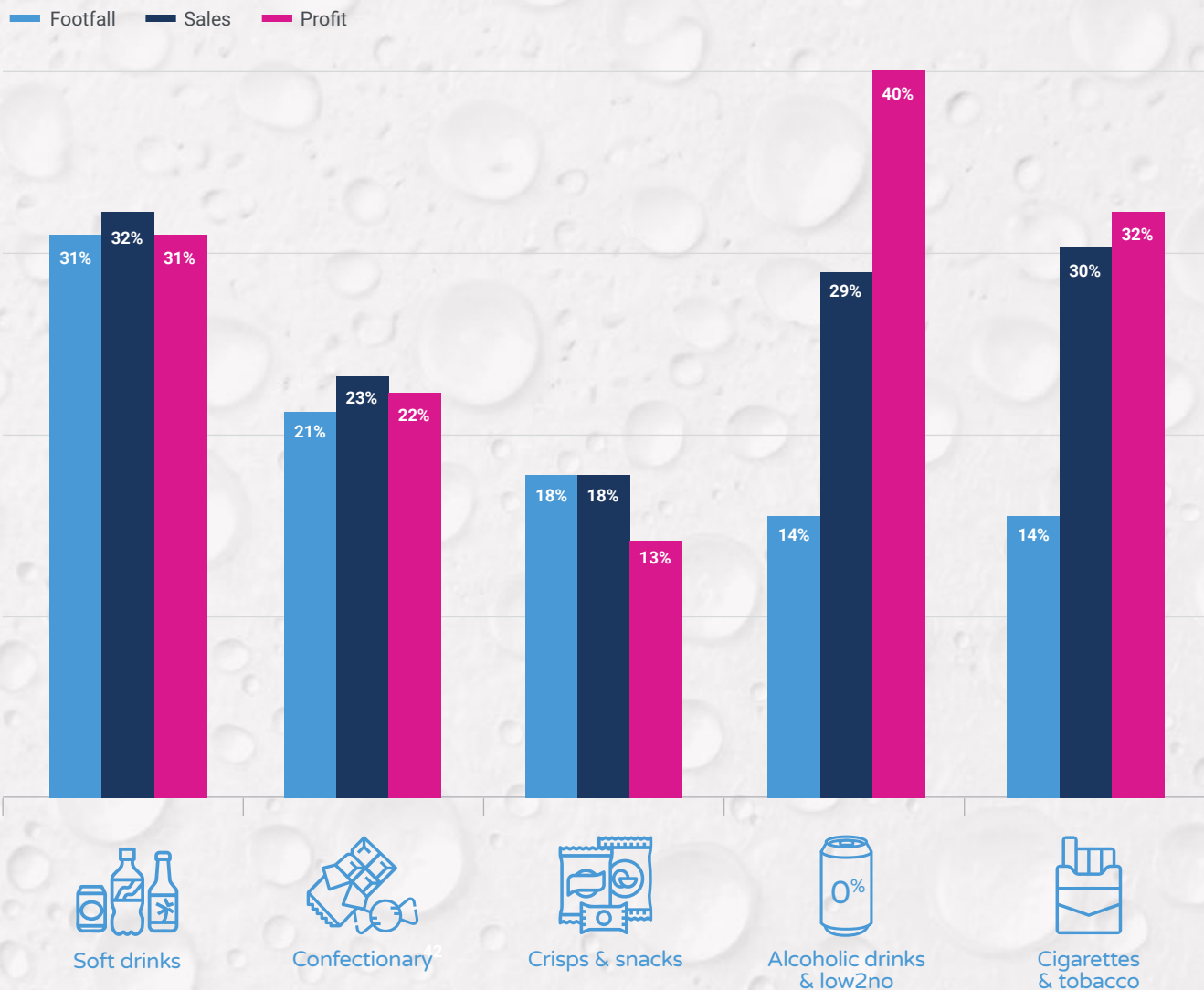
⁵ Lumina Intelligence Convenience Tracking Programme - 52w/e 08.01.23 - 07.01.24

⁶ Lumina Intelligence Convenience Tracking Programme, data collected 12WE 28.05.23

Soft drinks: convenience retailers' top footfall and sales drivers

Nothing's more likely to lure people through the doors of a convenience store than soft drinks. Soft drinks is the number one impulse category cited by almost three in ten retailers to drive footfall, sales and profit⁷.

Total convenience retail: Top 5 categories generating the most of store's footfall / sales / profit*

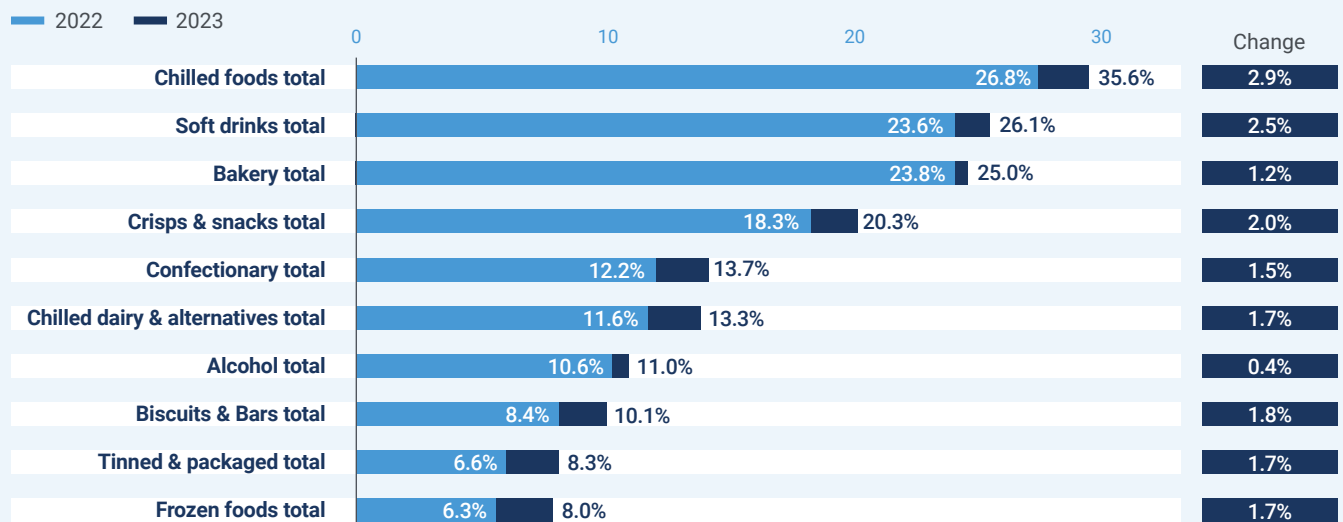


*Note: The definition of profit is subject to retailer interpretation

One in four convenience baskets features soft drinks⁸

Soft drinks were bought on over a quarter (26.1%) of visits to UK c-stores in 2023⁸, up from 23.6% in 2022.⁸ That makes soft drinks the second most purchased product in c-stores after chilled foods, a category that encompasses everything from ready meals to raw meat. Soft drinks is the most bought impulse category in convenience retail, appearing in more than twice as many shopping baskets as alcohol, which was bought on 11% of store visits in 2023.⁸

Basket analysis



To continue to capitalise on soft drinks' growth, it's crucial retailers understand the fundamental reasons people buy them. It will be no surprise that most drinks sold through c-stores are packaged in formats best suited for immediate, rather than deferred, consumption.⁹ They're also growing at a faster rate, having surged by 17.2% to £2.5bn, with units up 4%.⁹ Whereas, sales of deferred consumption formats grew by just 10% to £833.4m, with unit sales remaining flat year-on-year.⁹

As we've seen, soft drinks are cited as the number one footfall and sales driver for convenience retail¹⁰, accounting for 31% of all shopping missions and 32% of sales.¹⁰ Shoppers are visiting c-stores to buy soft drinks to satisfy a wide range of needs – "for a treat" is the number one reason claimed by half of shoppers, followed by 'for snacks' for over a quarter of shoppers.¹¹ It's therefore important that retailers stock a wide range of chilled soft drinks that are clearly visible, as well as positioning and promoting them with food, to drive up spend.

So too is ensuring they continue to offer exciting flavours and drinks that satisfy a variety of consumer needs. Limited edition flavours play a key role in generating excitement among shoppers, as the performances of Tango Sugar Free's Limited Editions show. Tango Editions Sugar Free Paradise Punch achieved sales of £4.2m last year,⁹ and Tango Sugar Free Berry Peachy racked up £3.4m in 2022.⁹ This year's launches, Tango Cherry Blast & Raspberry Blast and Tango Editions Mango are set for similar success.



⁸ Lumina Intelligence Tracking Programme - 52 w/e 08.01.23 - 07.01.24

⁹ Circana Convenience, Britvic Defined Soft Drinks, Value and Unit growth, YOY, 52WE 31.12.23

¹⁰ Lumina Intelligence Retailer Attitudes and Behaviours Study, July 2023

¹¹ Lumina Intelligence Convenience Tracking Programme, 52WE 31.12.23

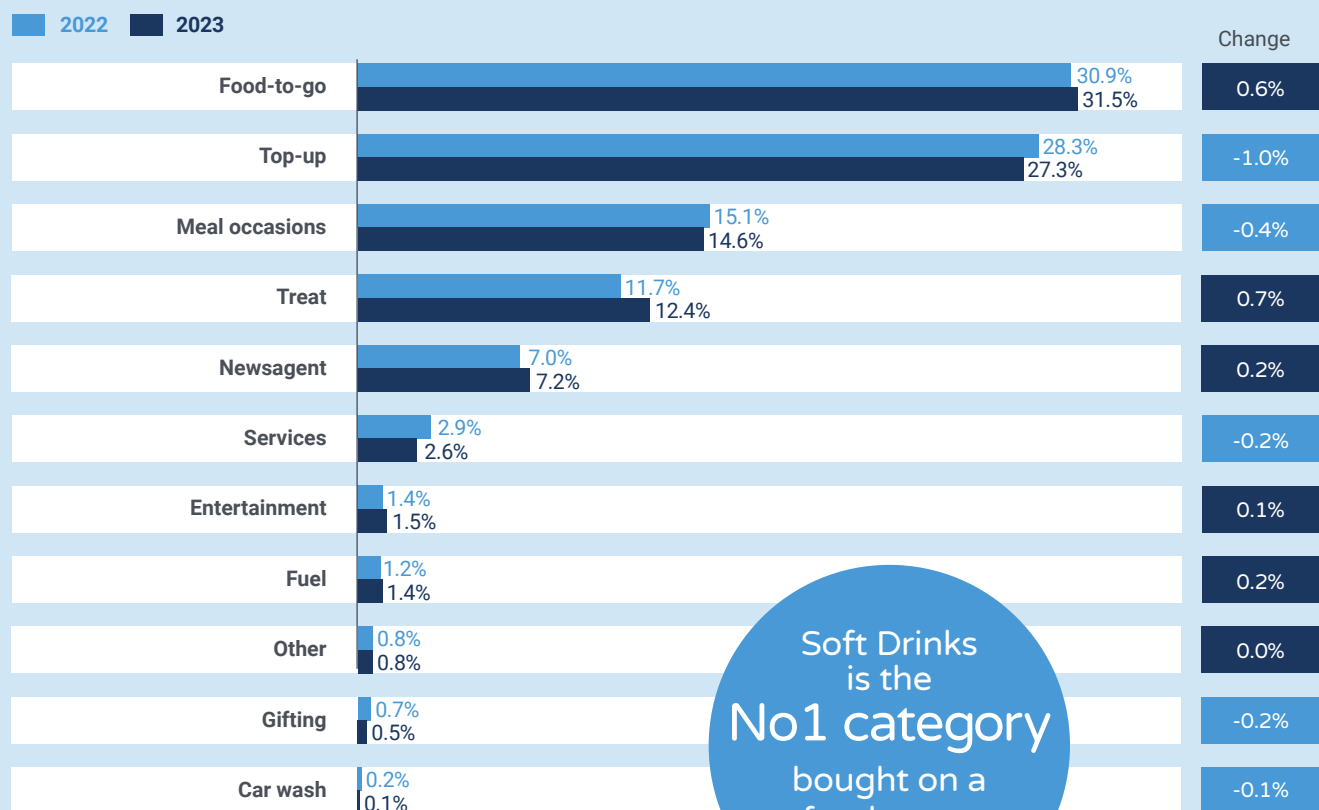
There are encouraging signs that products like these, combined with retailers' efforts to make soft drinks more visible in store, are striking a chord. Soft drinks were the most bought items in food-to-go visits, featuring in 48.6% of baskets and growing in importance across breakfast and lunch.⁸ Food-to-go and "treats", saw the greatest growth in share of soft drinks occasions in 2023, growing respectively by 0.6% pts to 31.5% and 0.7% pts to 12.4% last year.¹¹ The use of meal deals and link deals with snacks is a key driver of this.

Positioning interesting, refreshing, chilled drinks at prominent spots in store is helping to drive impulse sales and satisfy demand for treats on-the-go. However,

it's also evident that more could be done to encourage sales of drinks in deferred formats; see the flat unit sales below and the fact that sales to shoppers on top up and meal occasion missions fell respectively by 1% pts to 27.3% and 0.4% pts to 14.6%.¹¹ To address this Britvic is partnering with retailers to offer exciting evening meal deals featuring our leading brands. For example, the Co-op has been offering its members 4x330ml cans of Pepsi MAX[®] with two pizzas and a side for £10 (£12 for non-members). Initiatives like this helped to make Pepsi MAX[®] the fastest growing sugar-free cola in convenience in 2023.¹² Similarly, price marked packs and work by the Britvic field team to bring fixtures to life in stores are helping to encourage shoppers to consider Robinsons.

Soft drinks, share of mission⁸

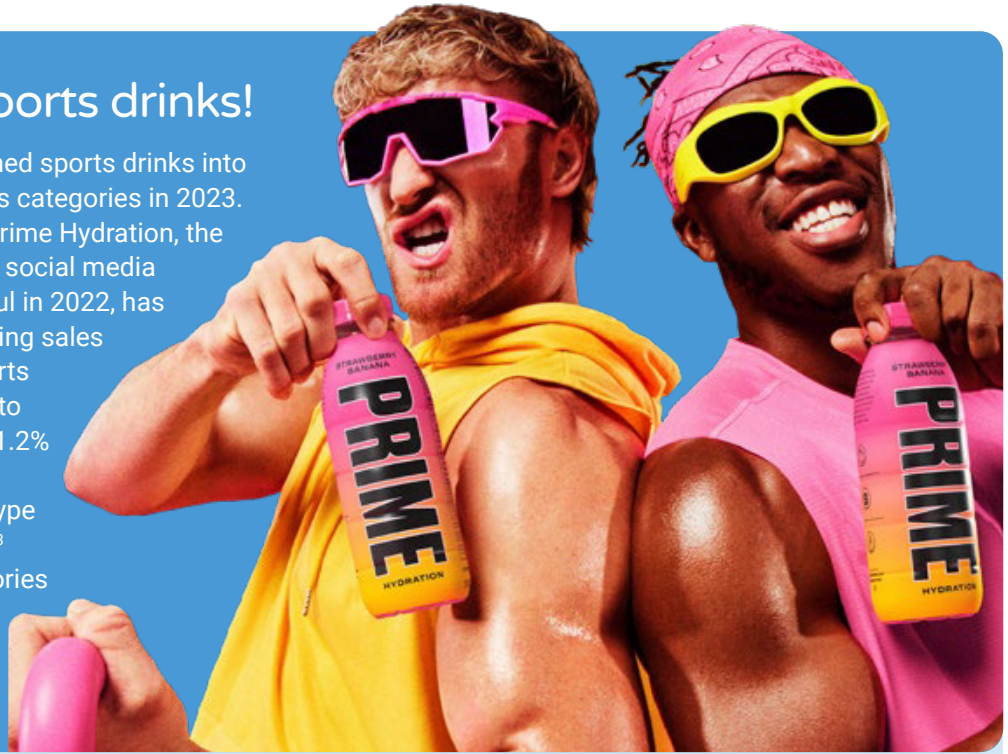
Food-to-go and Treat became more important missions for Soft Drink shoppers at the expense of Top Up and Meal Occasions.



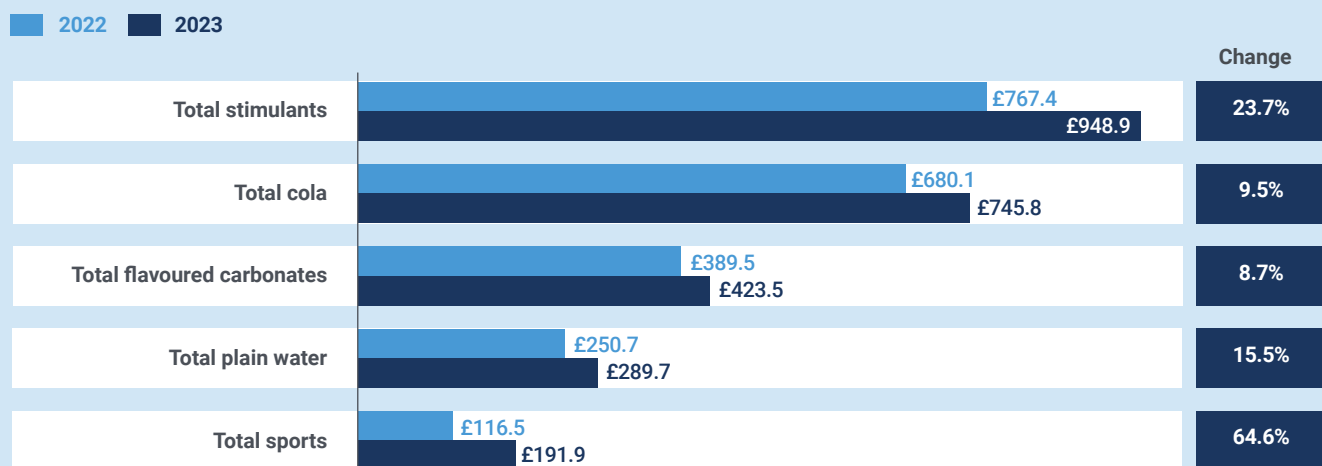
Soft Drinks
is the
No1 category
bought on a
food-to-go
mission⁸

Slam dunk for sports drinks!

Convenience retailers welcomed sports drinks into their top five bestselling drinks categories in 2023. No prizes for guessing why: Prime Hydration, the soft drinks brand launched by social media sensations KSI and Logan Paul in 2022, has taken the UK by storm, achieving sales worth £55.7m last year.¹³ Sports drinks sales surged by 64.6% to £191.9m and units went up 21.2% to overtake juice drinks and become the fifth bestselling type subcategory in convenience.¹³ Overall, the top five subcategories delivered growth worth £394.7m.¹³



Top five sub-categories, value growth & percentage change¹³



Top of the pops

Innovation plays a key role in soft drinks. In 2023, 'the top 20 drinks launches' generated combined sales of £36.5m for convenience retailers.¹³ The top three were responsible for 38.9% of the figure.¹³ Fanta Grapefruit & Pineapple, the new line that replaced Lilt in February 2023, delivered sales worth £5.6m. Red Bull Mixed Fruit racked up £4.4m and Tango Editions Sugar Free Paradise Punch hit sales of £4.2m.¹³

What might surprise some is the absence of Prime in the top five. In fact, seven of the top 20 launches belonged to the social media sensation and between them they racked up sales of £7.7m, an average of £1.1m each.¹³ Prime has clearly generated excitement and driven shoppers into stores. The challenge now is maintaining that excitement and encouraging repeat sales.

¹³ Circana Convenience, Britvic Defined Soft Drinks, Value and Unit growth, YoY, 52WE 31.12.23

¹⁴ Circana Convenience, Britvic Defined Soft Drinks, Value Sales, 52WE 31.12.23

Top five launches¹³

Sports drinks went to the top of the podium for percentage growth in 2023.¹⁴ Value sales grew by 64.6% on units up 21.2%, bringing sports drinks into convenience retail's top five selling drinks sectors.¹⁴ Stimulants also outperformed the wider market, with value sales growing by 23.7% year on year and adding the most value (£181.5m) to convenience.¹⁴ Units grew by 12.2%.¹⁵ Of course, growth in sports drinks and stimulants is partly driven by the success of Prime.

New additions to the Rockstar Energy® range, Rockstar Energy® Refresh Strawberry & Lime and Watermelon & Kiwi have racked up £1.9m¹⁴ since launch in 2022. These drinks, along with the Purdey's Natural Energy range, are satisfying growing demand for drinks that do more than quench thirst. Increasingly, people are looking for drinks that energise, satisfy specific health needs and pique interest with exotic and unusual flavour profiles.

Promotions play an important role in driving trial purchases

of new products. Particularly among shoppers aged between 18 and 24 years old, 71% of whom buy soft drinks on impulse and 57% of whom buy when drinks are on promotion.¹⁵ These shoppers are also more likely to be impacted by instore displays and merchandising that promotes soft drinks alongside other categories, such as chilled food, confectionery and snacks.¹⁵ That's why we're working with retail partners to perfect our promotions and drive more growth. One example of this is the recently announced partnership that Rockstar Energy® will run across select Live Nation festivals in the UK and will see the brand featured as headline partner of six major festivals beloved by Gen-Z in the UK, including Parklife, Wireless, TRNSMT, Reading and Leeds and Creamfields.

To find out how we're fuelling growth in one of convenience retail's most promising sub-categories, and what retailers from all parts of the market can learn from this sector, read on...

Why blue is the new black in cola

Sometimes categories need shaking up. That's exactly what Pepsi and Britvic aim to do to cola this summer with the launch of the UK's first *blue* cola, Pepsi Electric.

This innovative new cola delivers zesty, refreshing, citrusy flavour notes and, when positioned in prominent spots in chillers, will be eye catching and create a buzz in stores. Pepsi Electric won 97% approval ratings in consumer testing¹⁶ and is due for launch in 500ml PET bottles in May. How's that for a bolt from the blue?



¹⁵ Lumina Intelligence Convenience & Wholesale Market Report, July 2023

¹⁶ Ada Zappi Early Concept Test – Q2 2023

Convenience deep dive

How forecourts can fuel £36m¹ growth with soft drinks

Forecourt operators are going places. They're moving on from purely fueling vehicles and selling quick drinks and bites to eat on-the-go. New opportunities are growing as people stay at forecourts for longer while their electric vehicles charge. People are also visiting forecourts for a wider variety of reasons, such as buying meals for later and top-up shops. The channel is coming of age.



¹ Calculated by dividing the £306.9 soft drinks value in Circana, Roadside Petrol Multiples, Value Sales 2023 by the % of baskets from Lumina CTP (29.5%), Forecourts, 52 weeks to 04.02.24 & increasing to 33%

² ACS Forecourt Report 2023 - Experian's V2 2023 database release. August 2023

There are²

and

8,354

7,398

fuel forecourt sites
in the UK

have shops



All this presents significant opportunities for soft drinks, the channels best selling food and drink category.³ Soft drinks are an engine of growth for forecourts.⁴ They're bought on more than a quarter (29.5%) of forecourt visits.⁵ We calculate that by raising that number to one in every three baskets, operators can unlock an opportunity worth £36m.⁶ That's more than £4,900 a year in incremental sales per outlet.⁷

The following pages aren't only for forecourt retailers. With the roll out of electric vehicle charging infrastructure accelerating across a wide range of locations - including supermarkets, neighbourhood convenience stores and other retail sites⁸ - it's clear that many convenience operators could apply the lessons explored here to their own outlets. But they all need to start with a question: Why are my shoppers visiting the convenience store in a forecourt?

For forecourts, the answer seems obvious: for fuel, of course! But people's reasons are more varied than that. Demonstrating this, one in four (26.6%) visitors on a convenience mission to purchase items in a forecourt store arrive on foot as a local trip⁵. Of those using forecourts as a convenient pit stop for food and drink fuel is bought on just 8.8% of visits⁵. The most common reason people visit a forecourt shop is for food-to-go.⁵

Food-to-go missions account for 21.6%⁵ of total forecourt shop visits and, partly thanks to the widespread use of mechanics such as meal deals, 32.3% of soft drinks visits are attributed to people on food-to-go missions.⁵ Soft drinks also overtrade in fuel missions.⁵

There are also several missions in which soft drinks under index. For example, 17.4% of shop visits to forecourts are planned top-up shops but 16.2% of soft drinks visits are on these occasions;⁵ 9.8% of shop visits are to buy newspapers or magazines but only 5.5% of soft drinks are bought with these items;⁵ 6.1% of shop visits are to pick up meals for later while only 4.2% of soft drinks visits are to people on these missions.⁵ These missions represent significant growth opportunities for soft drinks producers and retailers.

32.3%
of soft drinks sales are
attributed to people on
food-to-go missions.⁵



³ ACS Forecourt Report 2023 - NielsenIQ Scantrack 2023. Data reflects Multiple Forecourt Retailers only

⁴ Circana, Total Soft Drinks Britvic Defined, Roadside Petrol Multiples, Value + Unit Sales % Change, 2023

⁵ Lumina CTP, Forecourts, 52 weeks to 04.02.24

⁶ Calculated by dividing the £306.9 soft drinks value in Circana, Roadside Petrol Multiples, Value Sales 2023 by the % of baskets from Lumina CTP (29.5%), Forecourts, 52 weeks to 04.02.24 & increasing to 33%

⁷ Calculated by dividing £36m by the 7.4k forecourts with C-stores in operation in the UK - Experian V2 database release, September 2022

⁸ <https://www.edie.net/uk-supermarkets-charge-ahead-with-ev-infrastructure-additions/>

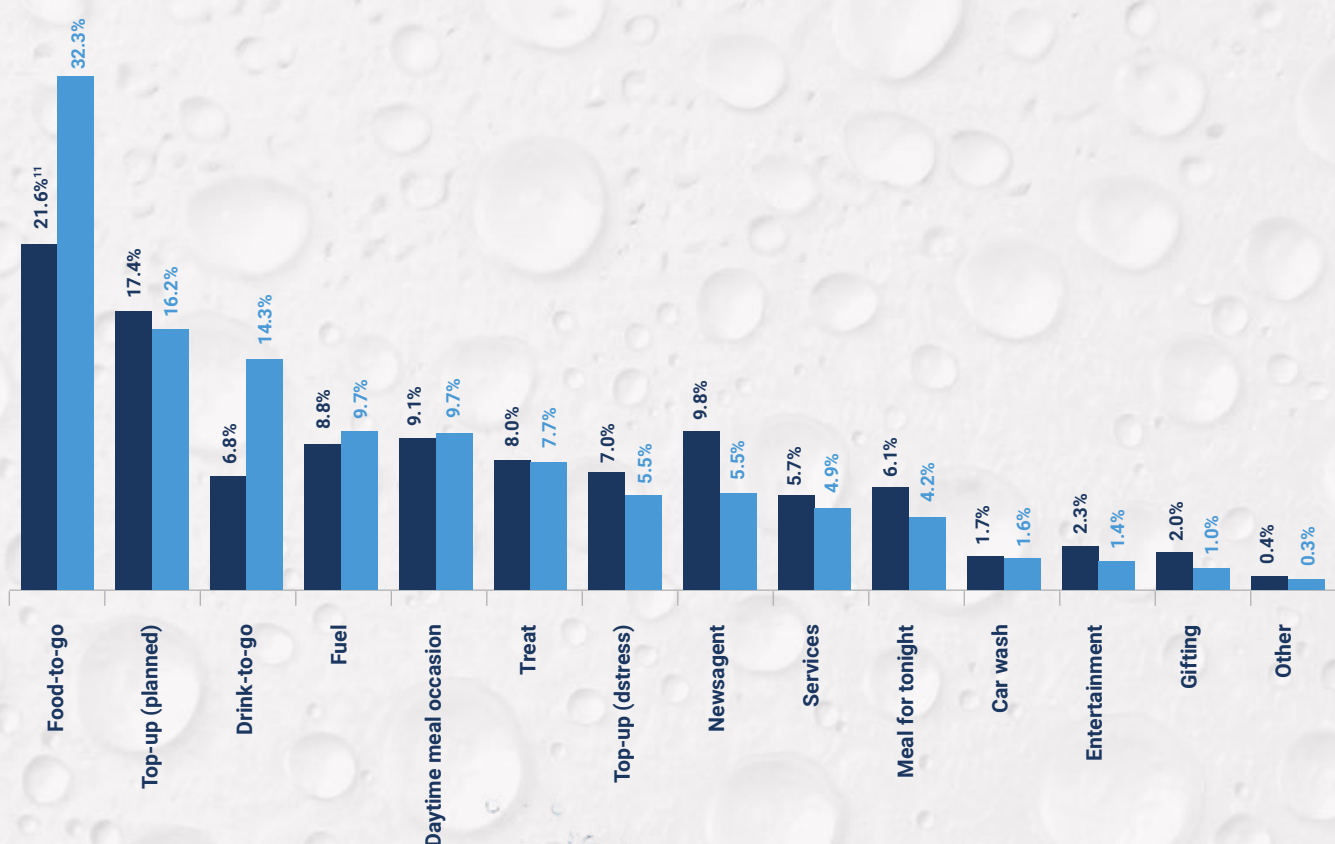
Why do people visit the forecourt shop?

Think fuel is the top reason people visit forecourt shops? Think again.

Fuel stops are the fourth most common reason for visiting roadside retailers, accounting for 8.8% of visits, behind stops for newspapers or magazines (9.8%), planned top-up shops (17.4%) and food-to-go (21.6%).⁵ As shown below, soft drinks are more likely to be bought on food-to-go, fuel and treat missions and less likely to be bought on occasions when people are on top-up or news missions. Encouraging shoppers to pick up drinks on these occasions with promotions and savvy merchandising will fuel further growth.

Share of shopper missions⁵

■ Forecourt shopper ■ Soft drink shopper



5 to Drive

RECHARGING
THE ENERGY
EVOLUTIONMOTORING
GEN Z'SDRIVING
HEALTHFUELLING
WITH FOODMORE
MILES FROM
DEFERRED

Recharging the Energy Evolution

We've identified several routes to soft drinks' £36m growth prize. Most of that figure comes from just one drinks category: energy drinks, which includes both classic energy and natural stimulants, which are already worth £109m to the channel,⁹ despite the fact that only 2.1% of forecourt shoppers currently buy them.¹⁰ By increasing that number, retailers can unlock further revenue to take their slice of the pie.

While 11.5% of convenience market spend on energy drinks was through roadside petrol multiples in 2023,¹¹ we're certain the channel can drive further growth if retailers apply data-driven insights to their approach.

It's important to consider people's reasons for visiting forecourts. Research shows that many are doing so because they want an energy boost. In fact, people are twice as likely to be looking for an energy boost in forecourts than they are when they visit outlets in the wider convenience retail sector.¹² Despite this, and as we've seen, the number of shoppers who buy energy drinks from forecourts remains surprisingly low.

Energy drinks' importance for the channel comes from the fact that those who do buy them are loyal and buy them regularly. Broadening the appeal of energy drinks to attract more people and to encompass a greater variety of consumption occasions will deliver much of the growth we've identified. Championing sugar-free energy drinks, merchandising them in prime impulse spots in-store and linking with social media to engage consumers will play a key role.

It's worth noting that 63% of spend on energy drinks in forecourts takes place between 9am and 2pm,¹² a fact that makes sense given the need many of us have for a pick-me-up at the beginning of the day or in the midst of a post-lunch slump. This suggests that energy drinks have a bigger role to play at other times, such as the homebound commute and evenings.

Different occasions demand different drinks. Classic energy drinks flavours such as Red Bull Original or Rockstar Energy® Original are perfect for those key morning energy boosts. Fruit flavour variants like Red Bull Editions or Rockstar Energy® Refresh Watermelon & Kiwi make great accompaniments for lunch and snacks later in the day, as well as standalone refreshments.



9 Circana, Total Stimulants Britvic Defined, Roadside Petrol Multiples, Value, 52we 31.12.23 vs. YA

10 Kantar WPO Out of Home Forecourts 52 w/e 18/02/2024

11 Circana, Total Stimulants Britvic Defined, Roadside Petrol Multiples, Value Share %, 52we 31.12.23

12 Lumina Intelligence Convenience Tracking Programme 52 w/e 04.02.24

Demand for products perceived as being natural or less processed is on the rise too. More than a third (34%) of people who do not consume energy drinks say there should be more natural alternatives available.¹³ We see significant potential in homebound post-work journeys and evening consumption for natural, lighter energy drinks.

Purdey's Natural Energy Drinks, a range of sparkling fruit juice blends infused with botanicals and B Vitamins, are ideally placed for occasions such as this. Clearly signposting the range and running promotions to drive trial will help retailers realise energy drinks' full potential by attracting more people into the category and encouraging consumption on a wider variety of occasions.



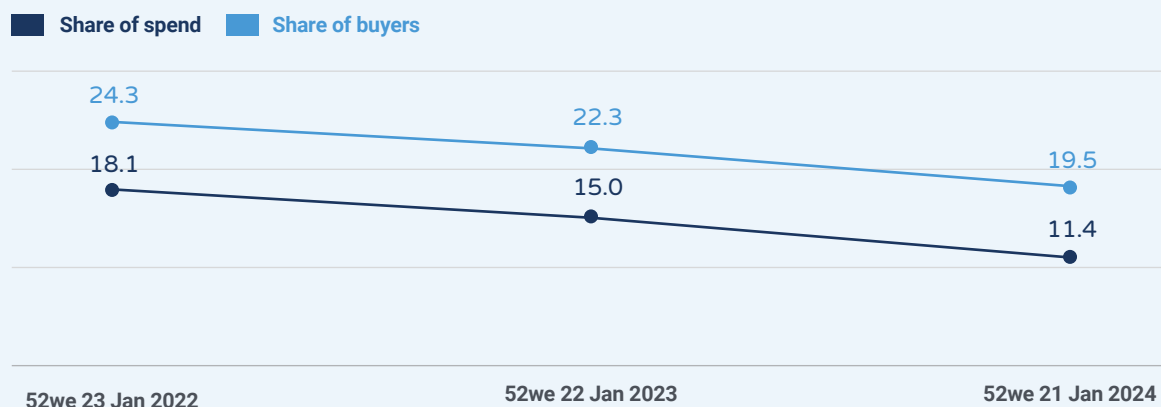
Motoring Gen-Z

Forecourt operators need to up their efforts to attract younger consumers. Share of spend in forecourts of people aged between 20 and 34 has crashed from 18.1% in 2022¹⁴ to just 11.4% in the year ending January 2024,¹⁴ despite share of shoppers belonging to this age group being 24.3% in 2022¹⁴ and 19.5% in 2024.¹⁴ Clearly, more needs to be done to encourage Generation Z to spend in forecourts.

We're doing this with activities such as the 2023 partnership with Rockstar Energy® and global rap superstar, Stormzy, the multi-year partnership Rockstar Energy® signed with festival organiser Live Nation in April, the launch of Tango Blast flavours and the 'You Probs Prefer Pepsi' campaign. Forecourt operators should aim to encourage younger shoppers into their outlets via social media activations showcasing their chilled drinks ranges and offering deals.



52 w/e share of soft drink value & buyers by shoppers aged 20-34 in forecourts¹⁴



¹³ Mintel Sports & Energy Drinks 2023

¹⁴ Kantar WPO Forecourt Shopper Spend and Buyer Shares - 52w 21.01.24



Driving health

The UK's growing health consciousness has been one of the defining trends of the food, drink and leisure industries in recent years. The value of the UK gyms and health club market hit a record high in 2023 and the number of people who are active gym members increased by 3.9% year-on-year.¹⁵ And it's clear that people want to continue their good work when they're outside the gym by consuming healthier food and drink.

This presents a huge opportunity for soft drinks. Nearly half of shoppers (45%) now judge the value of food and drink in terms of the added nutritional benefits they offer¹⁶ and two thirds (65%) say that added health benefits would make them want to consume more soft drinks.¹⁷ Hence why functional health drinks are one of the most dynamic and fast-moving categories in grocery right now.

How healthy (or not) the products on shelves are, plays an increasingly important role in how much shoppers are prepared to pay for them. Health may not be the #1 attitude across soft drinks shoppers in forecourts, but it is the one to see the greatest increase with 59% claiming to be very health led (up 3%pts YoY).¹⁸ By catering for the trend towards health consciousness with a wider range of soft drinks, forecourt operators can unlock further growth.

Products such as health shots, kombucha, kefir and drinks infused with CBD, adaptogens and natural sources are all commanding growing share of shelf space, so it's crucial that brands and retailers communicate these clearly and accurately.



We have the Plenish range of cold pressed juices and health shots to help give drinkers a healthy lift, whilst Aqua Libra's infused, Still and Sparkling UK-sourced waters (packaged in infinitely recyclable aluminum cans) provide convenient, healthy hydration. Jimmy's Iced Coffee MyProtein, meanwhile, is on hand to give shoppers a refreshing boost when they need it most.

Ensuring such products are clearly visible and chilled in-store is crucial if retailers are to realise the full opportunity. For more tips on how to capitalise on demand for healthier drinks, log on to the 'At Your Convenience' online platform www.atyourconvenience.com.



¹⁵ Health Club Management - <https://www.healthclubmanagement.co.uk/health-club-management-features/Insight-The-shape-of-now/36493>

¹⁶ Mintel Recession and the cost-of-living crisis - January 2023

¹⁷ Mintel Carbonated Soft Drink 2022

¹⁸ Lumina Intelligence Convenience Tracking Programme 52 w/e 31.03.23



Fuelling with food

Nearly half (44%) of forecourt food-to-go missions currently include a soft drink purchase.¹⁹ By encouraging more shoppers to pick up a drink when they're grabbing a bite to eat, even increasing soft drink purchases with food to one in two food-to-go occasions, retailers can unlock significant growth. But how?

Soft drink spend on snacking missions, which currently accounts for 31% more spend than in on-the-go lunch missions in UK forecourts¹⁹, is a key opportunity. Offering permanent link deals with popular snacks and soft drinks and ensuring both products are clearly sign-posted and stocked together in high footfall locations (and perfectly chilled in the case of soft drinks!) will pay big dividends.



With food offerings diversifying, it also pays to think closely about the kind of drinks you're offering as accompaniments to on-the-go snacks and meals. Nothing beats the classic combo of Pepsi MAX® or 7UP and a bag of crisps, of course, but there are plenty more pairings that can drive up basket spend such as Jimmy's Iced Coffee with pastries for morning snacks, or Aqua Libra with fresh fruit.

Time of day is another key consideration. It's worth noting that 71% of food-to-go missions in forecourts and convenience stores take place between 9:00 and 14:00,¹⁹ so pairing healthy snacks such as fresh fruit, yoghurts or cereal bars with products such as Plenish juice shots or Hip Pop Gut Lovin' Soda presents another lucrative opportunity for retailers.

Lunchtime is another key event, of course, accounting for 28% of total food-to go spend in forecourts.¹⁹ Nevertheless, there's still plenty of mileage for growth for operators, with lunch only accounting for 23% of food-to-go soft drinks sales.¹⁹ Our research shows that merchandising lunch items and soft drinks together with crystal clear communications on price and ranging in-store plays a crucial role in driving success at lunchtime. In fact, 'ease of shop' is 49% more important than 'range' at driving shoppers into stores.²⁰

The importance of clear communication, compelling ranges and competitive pricing is growing. As the rising cost of living continues to bite, younger people are buying fewer soft drinks with food-to-go. People aged 18 to 34 account for 48% of food-to-go purchase occasions but only 33% of total occasions, highlighting the importance of maximising engagement with this group.¹⁹

Stocking the sorts of drinks that appeal to this group – such as Rockstar Energy® for those looking for a pick-me-up, Dash Water for a natural livener or Plenish Health Shots for a breakfast accompaniment with a kick – plays a key role. So too does pairing drinks with a wider range of food types, because the sandwich no longer rules supreme when it comes to food-to-go.

In fact, just one in five lunch missions feature both a soft drinks and a sandwich.²⁰ Pairing soft drinks with fresh fruit and healthy snacks, ice creams, confectionery, paninis, pizza slices and hot dogs is helping to drive growth for our partners. And as forecourt dwell time continues to grow as electric vehicle ownership increases, the range of hot food and soft drinks pairing opportunities is growing too.



¹⁹ Lumina Intelligence Convenience Tracking Programme 52 w/e 04.02.24

²⁰ Lumina Intelligence Convenience Tracking Programme 52 w/e 03.03.24

Bigger breakfasts

Breakfast is big business for forecourts. It's growing too: the proportion of people who bought breakfast while travelling or commuting has risen by 0.3% pts to 11% of all breakfast occasions in the past year and 10% of all food-to-go missions in forecourts are for breakfast (double the number in wider convenience).²¹

Operators are cashing in. A fifth (20%) of food-to-go new product development launched in the first quarter of 2024 was for breakfast.²² With bakery the number one category at breakfast²¹, we suggest pairing items such as croissants and pain au chocolate with Jimmy's Iced Coffee to maximise spend. Alternatively, Plenish Health Shots are a perfect accompaniment to fresh fruit, overnight oats and yoghurts.



More Miles from Deferred

People don't just buy food and drink from forecourts to consume on-the-go or while they're charging their electric vehicle. Growing numbers are picking up meals for the night ahead. Forecourts could be doing more to tap into this opportunity. On average, shoppers are paying £10.44 for a 'meal for tonight' with a soft drink but are currently only spending £7.18 in forecourts.²³ This presents a massive 45% growth opportunity.²³

We have the insights to help retailers realise this. Frozen & chilled foods are purchased for 'meal for tonight',²³ so merchandising larger sharing bottles and multipacks of 7UP, Tango and Dr Pepper with frozen pizzas and ready meals and offering link deals can help drive growth. Indeed, Britvic launched a new four-pack of 330ml cans of Pepsi MAX[®] to tap into this opportunity. Offering shoppers the chance to trade up with deals on products such as J2O and London Essence Company drinks can also pay off.

Specific events such as sports tournaments and cultural events, as well as seasonal opportunities, can pay handsomely when it comes to realising the deferred drinks opportunity. With several high-profile sports tournaments kicking off this summer (as well as the Great British barbecue season), retailers can cash in as people get together by stocking larger formats and multipacks of soft drinks.

We believe that forecourt operators can realise more growth by increasing drinks presence in top-up missions baskets in forecourts.²¹ The size of the prize in 'meal-for-tonight' illustrates a key fact: not all soft drinks bought from forecourts are for quenching thirst on-the-go. With forecourts expected to continue to evolve at pace over coming years, the opportunities to drive growth in soft drinks will grow too.



²¹ Lumina Intelligence Convenience Tracking Programme 52 w/e 04.02.24

²² Lumina Intelligence UK Food to Go Market Report 2024; Q1 2024

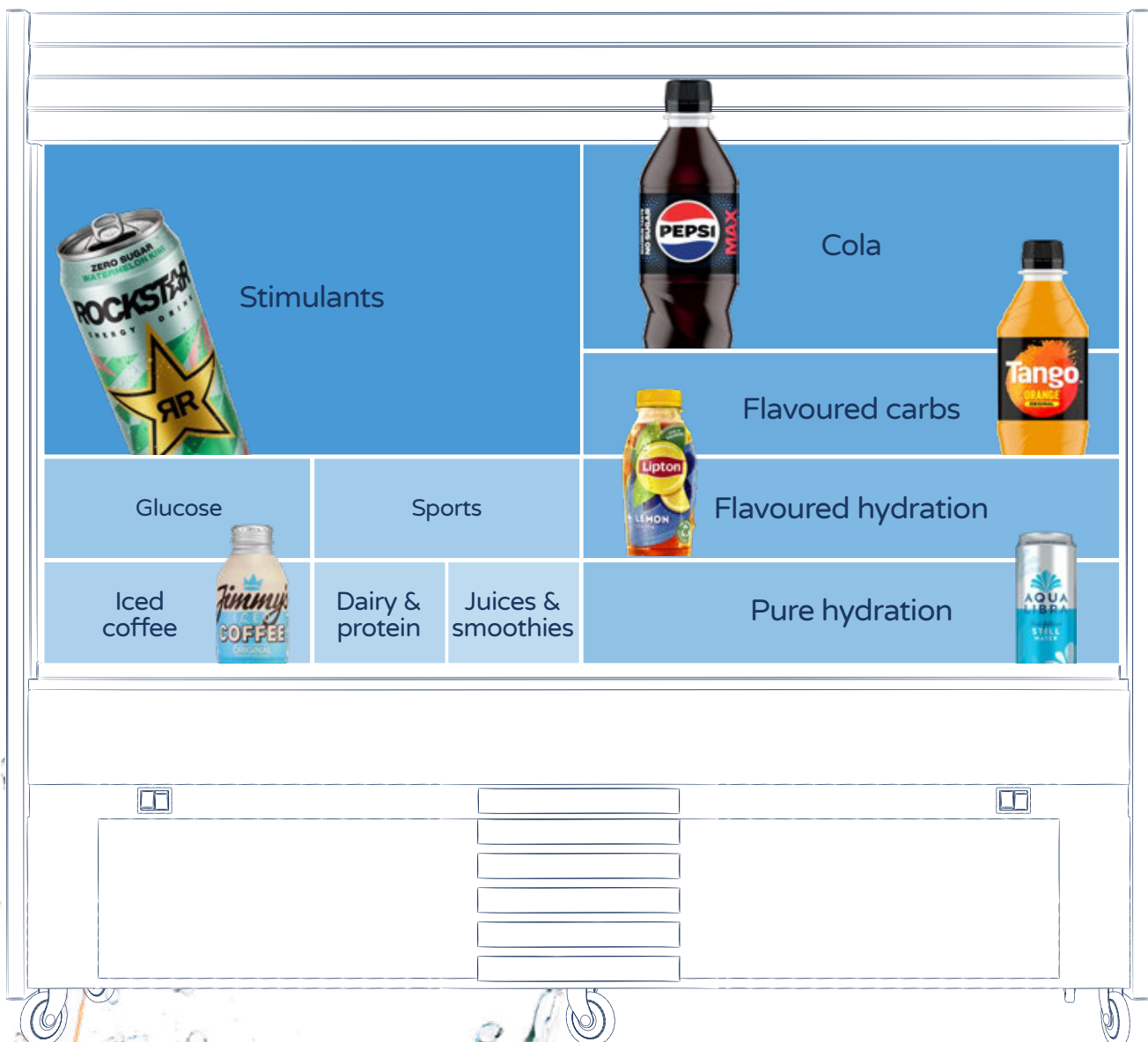
²³ Lumina Intelligence Convenience Tracking Programme 2023

How to help shoppers bag a deal (and drive growth for your business)

Clear communication is crucial when it comes to helping people complete their missions. It's key that retailers communicate promotions clearly along the path to purchase, merchandise products included in deals together and ensure that prices are not easily missed. Try stocking larger bottles of Pepsi MAX®, Fanta and 7UP in chillers alongside pizzas and ready meals to drive growth in meal-for-tonight shoppers.

In the chiller we suggest energy (Stimulants, Glucose & Sports) and carbonates (Cola and Flavoured Carbonates) are beacon categories. Heroing key brands such as Red Bull, Monster, Lucozade, Dr Pepper, Fanta, Tango, Coca Cola and Pepsi. Alongside these category staples, ensuring hydration need is covered with plain, flavoured and functional varieties offering choice with brands such as Aqua Libra, Lipton and Robinsons Ready-To-Drink.

For more tips on how to capitalise on demand for healthier drinks visit www.atyourconvenience.com
Why not try the below plan on for size?



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

	Value/£m	Value growth actual YA/£m	Value growth % YA	Litres	Litres growth actual YA	Litres growth % YA
Total soft drinks	£3,299,604,480	£438,739,712	15.3%	1,500,202,752	43,593,472	3.0%
Total take home	£833,383,104	£76,072,768	10.0%	677,034,496	8,956,416	1.3%
Total on the go	£2,465,670,912	£362,433,920	17.2%	823,156,032	34,632,128	4.4%

Circana, Total Convenience, Total Soft Drinks Britvic Defined, Value & Litres, 52WE 31/12/2023 vs. YA

Soft Drink category winners & losers

2023 categories in growth	Value	Value Growth Actual YA	Value Growth % YA
Total stimulants	£948,872,640	£181,508,736	23.7%
Total sports	£191,858,576	£75,310,376	64.6%
Total cola	£745,828,800	£64,974,464	9.5%
Total plain water	£289,703,616	£38,970,144	15.5%
Total flavoured carbonates	£423,518,816	£33,979,508	8.7%
Total fruit carbs	£347,466,560	£23,167,104	7.1%
Total glucose	£155,140,272	£16,467,680	11.9%
Total non-fruit carbs	£76,052,256	£10,812,404	16.6%
Total water plus	£129,927,216	£8,105,016	6.7%
Total juice drinks	£188,555,648	£7,638,224	4.2%
Total pure juice	£82,955,128	£5,943,080	7.7%
Total iced tea	£28,011,770	£4,872,586	21.1%
Total squash	£43,132,644	£2,387,160	5.9%

Circana, Total Convenience, Total Soft Drinks Britvic Defined, Value, 52WE 31/12/2023 vs. YA

2023 categories in decline	Value	Value Growth Actual YA	Value Growth % YA
Total smoothies	£15,629,061	-£542,818	-3.4%
Total traditional mixers	£20,575,716	-£1,092,318	-5.0%

Circana, Total Convenience, Total Soft Drinks Britvic Defined, Value, 52WE 31/12/2023 vs. YA

Top 10 brand winner in convenience: Ranked by value change vs year ago

	Value YA	Value/£m	Value growth actual YA/£m	Value growth % YA
Total Red Bull	£340,393,469	£402,681,465	£62,287,996	18.3%
Total Prime	£567,252	£55,651,187	£55,083,935	9710.7%
Total Coca Cola	£304,891,500	£346,870,081	£41,978,581	13.8%
Total Monster Juice	£71,493,431	£97,486,293	£25,992,863	36.4%
Total Monster Energy	£99,879,644	£123,654,218	£23,774,574	23.8%
Total Monster Ultra	£53,687,939	£74,736,641	£21,048,702	39.2%
Total Pepsi Max®	£141,643,862	£160,230,719	£18,586,857	13.1%
Total Lucozade Energy	£126,597,689	£143,112,816	£16,515,127	13.0%
Total Evian	£60,057,823	£76,191,572	£16,133,749	26.9%
Total Buxton	£51,075,157	£63,446,080	£12,370,923	24.2%

Circana, Total Convenience, Total Soft Drinks Britvic Defined, Value, 52WE 31/12/2023 vs. YA

Top 25 NPD

	Value
Total Fanta Fruit Carbs Grapefruit/Pineapple	£5,550,104
Total Red Bull Stimulants Mixed Fruit	£4,448,676
Total Tango Sugar Free Fruit Carbs Punch	£4,201,836
Total Lucozade Sport Zero Sports Berry	£2,222,981
Total Boost Sport Sports Mango/Raspberry	£1,817,818
Total Lucozade Energy Stimulants Lemon	£1,665,285
Total Prime Stimulants Strawberry/Watermelon	£1,590,315
Total Prime Stimulants Raspberry	£1,380,222
Total Prime Stimulants Ice Pop	£1,377,936
Total Red Bull Stimulants Apple/Fig	£1,366,686
Total Prime Sports Glowberry	£1,275,699
Total Barrs Fruit Carbs Mixed Fruit	£1,269,819
Total Jacks Pure Juice Orange	£1,249,455
Total Rockstar Refresh Stimulants Lime/Strawberry	£1,233,731
Total Prime Stimulants Mango/Orange	£1,114,695
Total Trinketto Juice Drinks Assorted	£1,059,163
Total Prime Stimulants Lemon/Lime	£962,102
Total Oasis Zero Juice Drinks Fruit	£949,251
Total Prime Stimulants Tropical Punch	£931,696
Total Lucozade Sport Zero Sports Citrus	£815,559
Total Volvic Touch of Fruit Sf Water Plus Kiwi/Lime	£807,295
Total Rockstar Refresh Stimulants Kiwi/Watermelon	£703,762
Total Lucozade Sport Zero Sports Orange/Peach	£703,323
Total Prime Sports Lemonade	£662,985
Total Naked Machine Smoothies Apple/Banana/Guava/Mango/Passionfruit	£645,172

Circana, Total Convenience, Total Soft Drinks Britvic Defined, Value, 52WE 31/12/2023

Manufacturer performance (top ten) Convenience GB

	Value	Value Growth Actual YA	Value Growth % YA
Total CC Enterprises Ltd	£1,092,805,888	£117,448,320	12.0%
Total Red Bull Ltd	£347,469,440	£35,243,360	11.3%
Total Britvic UK PLC	£338,996,566	£51,006,821	17.7%
Total Suntory Beverage & Food GB&I	£255,852,160	£26,668,400	11.6%
Total Danone Waters Ltd	£165,169,939	£28,846,548	21.2%
Total A G Barr PLC	£129,039,768	-£1,653,840	-1.3%
Total Own Label Ltd	£121,997,552	£531,912	0.4%
Total Nestle Waters Ltd	£66,300,072	£32,566,034	96.5%
Total Refresco Beverages Ltd	£35,610,039	£4,961,574	16.2%
Total Boost Drinks Ltd	£33,281,597	£7,734,989	30.3%

Circana, Total Convenience, Total Soft Drinks Britvic Defined, Value, 52WE 31/12/2023 vs. YA

Segment performance convenience GB

	Value	Value growth actual YA	Value growth % YA	Litres	Litres Growth Actual YA	Litres Growth % YA
Total soft drinks	£3,299,604,480	£438,739,712	15.3%	1,500,202,752	43,593,472	3.0%
Total stimulants	£948,872,640	£181,508,736	23.7%	259,388,832	29,805,408	13.0%
Total sports	£191,858,576	£75,310,376	64.6%	69,052,992	12,027,784	21.1%
Total cola	£745,828,800	£64,974,464	9.5%	381,936,608	5,636,736	1.5%
Total plain water	£289,703,616	£38,970,144	15.5%	215,014,576	4,708,448	2.2%
Total fruit carbs	£347,466,560	£23,167,104	7.1%	183,860,704	1,679,168	0.9%
Total glucose	£155,140,272	£16,467,680	11.9%	57,126,660	797,476	1.4%
Total non-fruit carbs	£76,052,256	£10,812,404	16.6%	54,182,608	4,642,336	9.4%
Total water plus	£129,927,216	£8,105,016	6.7%	75,931,016	-6,270,648	-7.6%
Total juice drinks	£188,555,648	£7,638,224	4.2%	75,331,864	-2,433,056	-3.1%
Total pure juice	£82,955,128	£5,943,080	7.7%	33,943,180	-1,133,964	-3.2%
Total ice tea	£28,011,770	£4,872,586	21.1%	11,032,538	2,061,603	23.0%
Total squash	£43,132,644	£2,387,160	5.9%	24,421,736	-1,626,200	-6.2%

Circana, Convenience, Total Soft Drinks Britvic Defined, Value & Litres, 52WE 31/12/2023 vs. YA

Segment performance High Street

	Value	Value growth actual YA	Value growth % YA	Litres	Litres Growth Actual YA	Litres Growth % YA
Total soft drinks	£276,126,048	£12,434,624	4.7%	136,315,104	-4,494,208	-3.2%
Total stimulants	£66,597,856	£8,367,004	14.4%	19,205,534	955,848	5.2%
Total sports	£14,754,137	£5,464,748	58.8%	4,848,630	1,368,807	39.3%
Total cola	£72,656,408	-£3,019,280	-4.0%	39,831,632	-5,195,136	-11.5%
Total plain water	£19,765,438	£2,278,616	13.0%	18,036,152	1,747,337	10.7%
Total fruit carbs	£29,862,630	-£522,362	-1.7%	17,771,016	-273,798	-1.5%
Total glucose	£12,840,298	-£817,550	-6.0%	5,100,653	-822,931	-13.9%
Total non-fruit carbs	£4,632,463	-£48,051	-1.0%	3,035,870	-105,081	-3.3%
Total water plus	£14,672,041	£389,181	2.7%	8,731,260	-744,375	-7.9%
Total juice drinks	£16,950,594	-£643,940	-3.7%	7,048,373	-484,598	-6.4%
Total pure juice	£9,731,739	£880,271	9.9%	3,941,587	263,646	7.2%
Total ice tea	£1,972,292	£375,377	23.5%	678,685	60,915	9.9%
Total squash	£3,736,429	£18,848	0.5%	2,306,609	-144,889	-5.9%

Circana, High Street, Total Soft Drinks Britvic Defined, Value & Litres, 52WE 31/12/2023 vs. YA

Segment performance Symbols & Independents

	Value	Value growth actual YA	Value growth % YA	Litres	Litres Growth Actual YA	Litres Growth % YA
Total soft drinks	£2,513,839,616	£362,182,400	16.8%	1,198,691,968	39,708,160	3.4%
Total stimulants	£749,527,104	£153,778,240	25.8%	212,106,272	26,144,128	14.1%
Total sports	£154,563,408	£63,123,048	69.0%	58,394,028	9,538,292	19.5%
Total cola	£582,856,384	£62,232,352	12.0%	312,332,032	11,268,224	3.7%
Total plain water	£164,256,048	£14,624,080	9.8%	144,041,152	-3,145,440	-2.1%
Total fruit carbs	£278,000,480	£20,076,592	7.8%	153,467,376	1,865,808	1.2%
Total glucose	£121,600,776	£16,295,360	15.5%	46,544,760	1,733,252	3.9%
Total non-fruit carbs	£65,907,904	£10,056,640	18.0%	49,361,920	4,619,388	10.3%
Total water plus	£83,645,160	£7,720,336	10.2%	54,718,420	-4,463,204	-7.5%
Total juice drinks	£143,332,336	£6,277,232	4.6%	60,624,272	-1,934,096	-3.1%
Total pure juice	£59,801,688	£5,109,216	9.3%	26,986,606	-1,036,714	-3.7%
Total ice tea	£18,353,590	£2,438,361	15.3%	8,293,225	1,604,911	24.0%
Total squash	£38,110,468	£2,195,008	6.1%	21,660,278	-1,434,412	-6.2%

Circana, Symbols & Independents, Total Soft Drinks Britvic Defined, Value & Litres, 52WE 31/12/2023 vs. YA

Segment performance Petrol & Travel

	Value	Value growth actual YA	Value growth % YA	Litres	Litres Growth Actual YA	Litres Growth % YA
Total soft drinks	£509,638,880	£64,122,624	14.4%	165,195,616	8,379,392	5.3%
Total stimulants	£132,747,664	£19,363,520	17.1%	28,077,022	2,705,430	10.7%
Total sports	£22,541,020	£6,722,573	42.5%	5,810,334	1,120,683	23.9%
Total cola	£90,316,056	£5,761,416	6.8%	29,772,940	-436,350	-1.4%
Total plain water	£105,682,136	£22,067,448	26.4%	52,937,280	6,106,552	13.0%
Total fruit carbs	£39,603,444	£3,612,848	10.0%	12,622,314	87,154	0.7%
Total glucose	£20,699,190	£989,860	5.0%	5,481,249	-112,844	-2.0%
Total non-fruit carbs	£5,511,886	£803,814	17.1%	1,784,819	128,030	7.7%
Total water plus	£31,610,012	-£4,500	-0.0%	12,481,335	-1,063,069	-7.8%
Total juice drinks	£28,272,722	£2,004,924	7.6%	7,659,220	-14,360	-0.2%
Total pure juice	£13,421,702	-£46,408	-0.3%	3,014,987	-360,899	-10.7%
Total ice tea	£7,685,890	£2,058,849	36.6%	2,060,628	395,776	23.8%
Total squash	£1,285,750	£173,308	15.6%	454,849	-46,898	-9.3%

Circana, Petrol & Travel, Total Soft Drinks Britvic Defined, Value & Litres, 52WE 31/12/2023 vs. YA

Segment performance Roadside Petrol Multiples

	Value	Value growth actual YA	Value growth % YA	Litres	Litres Growth Actual YA	Litres Growth % YA
Total soft drinks	£306,856,704	£27,581,376	9.9%	103,036,488	1,654,432	1.6%
Total stimulants	£109,309,960	£14,928,080	15.8%	23,586,790	1,886,874	8.7%
Total sports	£17,501,546	£5,107,578	41.2%	4,645,165	823,718	21.6%
Total cola	£57,203,896	£891,648	1.6%	21,234,250	-816,158	-3.7%
Total plain water	£38,790,616	£3,447,856	9.8%	24,364,490	1,048,820	4.5%
Total fruit carbs	£22,489,684	£1,610,512	7.7%	8,162,491	82,280	1.0%
Total glucose	£14,624,323	£347,552	2.4%	4,061,669	-178,932	-4.2%
Total non-fruit carbs	£2,666,969	£424,191	18.9%	1,002,896	64,062	6.8%
Total water plus	£11,495,617	£543,395	5.0%	5,628,146	-575,126	-9.3%
Total juice drinks	£16,078,799	-£123,825	-0.8%	4,641,028	-293,958	-6.0%
Total pure juice	£7,403,544	£67,933	0.9%	2,061,704	-174,977	-7.8%
Total ice tea	£3,126,598	£412,013	15.2%	896,640	88,626	11.0%
Total squash	£832,170	£2,801	0.3%	408,918	-32,574	-7.4%

Circana, Roadside Petrol Multiples, Total Soft Drinks Britvic Defined, Value & Litres, 52WE 31/12/2023 vs. YA

Segment performance Travel

	Value	Value growth actual YA	Value growth % YA	Litres	Litres Growth Actual YA	Litres Growth % YA
Total soft drinks	£202,782,160	£36,541,216	22.0%	62,159,132	6,724,960	12.1%
Total stimulants	£23,437,706	£4,435,446	23.3%	4,490,232	818,557	22.3%
Total sports	£5,039,475	£1,614,996	47.2%	1,165,169	296,965	34.2%
Total cola	£33,112,160	£4,869,766	17.2%	8,538,690	379,808	4.7%
Total plain water	£66,891,516	£18,619,592	38.6%	28,572,790	5,057,732	21.5%
Total fruit carbs	£17,113,762	£2,002,340	13.3%	4,459,823	4,874	0.1%
Total glucose	£6,074,868	£642,309	11.8%	1,419,580	66,088	4.9%
Total non-fruit carbs	£2,844,917	£379,623	15.4%	781,923	63,968	8.9%
Total water plus	£20,114,396	£547,894	-2.7%	6,853,189	-487,944	-6.6%
Total juice drinks	£12,193,924	£2,128,750	21.1%	3,018,192	279,598	10.2%
Total pure juice	£6,018,158	£114,341	-1.9%	953,284	-185,922	-16.3%
Total ice tea	£4,559,292	£1,646,837	56.5%	1,163,988	307,150	35.8%
Total squash	£453,580	£170,507	60.2%	45,932	-14,325	-23.8%

Circana, Travel, Total Soft Drinks Britvic Defined, Value & Litres, 52WE 31/12/2023 vs. YA

Glossary

Cola

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

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

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, cherry, lime, blackcurrant, apple, pineapple and grapefruit, lemon, lemon and lime, tropical and other mixed fruit flavours. Excludes non fruit carbonates such Dr Pepper and Irn Bru

Iced coffee

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

Juice drinks

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

Lemonade

All conventional clear and cloudy or traditional, carbonated lemonade; flavoured with lemon juice and additional fruit flavours 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 (other)

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

Smoothies

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

Sports drinks

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

Squash (also see Dilutes)

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

Stills

Collective term for the non-carbonated segments

Stimulants

All 'energy boosting' drinks such as Red Bull, normally fizzy

Water

Still or sparkling water with nothing else added

Water plus / Flavoured water

Sparkling or still flavoured water



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