

CONVENIENCE & IMPULSE

2017

BRITVIČ

Soft Drinks Review



W E L C O M E



Welcome to the 2018 Britvic Soft Drinks Review. There is no doubt that it has been another interesting year for our category as manufacturers really got to grips with the impending soft drinks industry levy and how best to navigate it.

It feels to me like the industry has got ahead of the game and last year we saw a huge amount of innovation and reformulation across the board, probably more so than was expected. Health remains front of mind for consumers when choosing a soft drink and I am proud that our industry is playing its part in removing millions of calories from people's diets and offering them great tasting, healthier soft drinks solutions. But, health and sugar are not the only stories playing out in soft drinks. Last year saw a continuation of key trends such as premiumisation and convenience, as well as the emergence of some newer talking points affecting the category like zero proof alcohol and the growing focus on sustainability.

At Britvic, we are committed to making a positive difference to the world around us and have recently launched our sustainability platform 'A Healthier Everyday' where, amongst many other things, we have committed to reducing the amount of materials we use across all packaging formats and ensuring that 15% of our PET comes from recycled or renewable materials.

Finally, we are also very excited to be introducing you to our new soft drinks category vision 'Drink Differently', which plots the roadmap to unlocking category growth. As always, we hope you find this document useful and look forward to hearing any feedback on how we can continue to improve and evolve it.

Kind Regards,

Paul Graham
GB Managing Director



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TOTAL SOFT DRINKS



In 2017, the soft drinks industry demonstrated its ability to evolve in an ever-changing world, continuing to remain relevant in everyone's daily lives.

The upcoming 2018 soft drinks industry levy was on everyone's agenda and numerous high-profile product reformulations, innovations and health-led activations, reflected the categories ability to adapt to changing market circumstances.

The increasing demand for health and wellness, convenience and experience, provided great opportunities for differentiation, which the industry is evolving quickly to capture across all channels.

Health hits the headlines

Health continued to be one of the defining trends for soft drinks in 2017. Low and no sugar variants grew in carbonates categories, while water and water plus, continued to experienced strong growth as consumers searched for healthier hydration solutions.

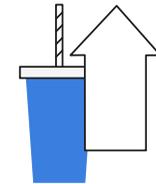
As the industry geared up for the introduction of the soft drinks industry levy, significant innovation in the form of product reformulation took place. The extent of this was widely viewed as well above expectation and cemented soft drinks as the leading category amongst its peers.

The result of these reformulations meant the industry's predicted exposure to the levy fell by over £200m¹.



£15.2bn²

The estimated total value of UK soft drink sales



+1.4%²

Total market growth for the year

£6.9bn²

Carbonates remain the largest segment worth

+£88m²

Mixers contributed the most value growth

+30%²

Smoothies were the fastest growing segment

2.6bn litres²

Water & Water Plus combined are the most consumed

Full Sugar Value

£4,772m³

-1.0%

Low Calorie Value

£2,997m³

+7.6%

Britvic has removed

20bn calories⁴

annualised since 2013

Source:

- Nielsen Scantrack, Sugar Levy Market Segmentation, March 2016 v March 2018
- Nielsen & CGA Combined Market Read, Value Sales, 52 Wk to Dec 2017

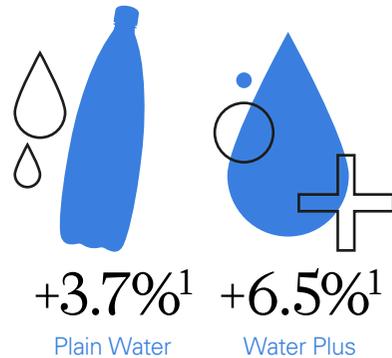
- Nielsen Scantrack, Value Sales, 52 Wk to Dec 2017
- Britvic plc Annual Report and Accounts 2017

TOTAL SOFT DRINKS CONTINUED

“We passionately feel that non-drinkers at social occasions should be able to enjoy exceptional drinks, so we created our own!”

Ounal Bailey

Co-Founder Wisehead Productions.



Water, water everywhere

Water has long been heralded as a success story in soft drinks and is now the largest volume segment in the category growing at +6.1%².

2017 saw significant innovation, with leading brands seeking to build on the benefits of hydration, with products bringing excitement or functionality to plain water. The flavoured water segment was invigorated by many exciting new entrants. Robinsons Refresh'd gave consumers a tasty way to hydrate, low in sugar and using naturally sourced ingredients.

In addition, a new segment emerged for consumers to experience 100% naturally infused sparkling water products. While this segment is new in the UK, its potential is huge with global sales doubling in the last 4 years³.



**ROBINSONS
REFRESH'D**
WAS NAMED THE
No 1
**SOFT
DRINKS**
NPD LAUNCH
IN 2017

No alcohol – no problem

With the growing number of people abstaining from or reducing their alcohol intake, 2017 was a transformational year with low and no alcohol sales growing +20.1% to £35m². The soft drinks industry aimed to seize this opportunity by increasing range and visibility of great tasting, sophisticated adult drinks.

Super premium beverages, termed 'zero-proof', were developed to mimic the positive cues of the alcohol without any compromise. These products will play an increasingly important role for premium outlets who want to create a high-end range to drive distinctiveness. Ensuring these products are visible, endorsed by staff and activated as appealing alternatives to alcohol will deliver premium growth.

Convenience is king

The growing demand for on-the-go solutions to fit into consumers busy lifestyles continues to accelerate. IGD predicts that the food-to-go market, currently worth £17.4bn, will grow to £23.5bn by 2022⁴. Operators in all channels are aware that having a great soft drinks offer is critical to success for capturing both 'drink only' and 'food-to-go' which make up 75% of all out-of-home missions*.

Soft drinks play an integral role in these occasions, but partnering better with food across the growing breakfast, brunch and snacking occasions will unlock significant headroom for soft drinks.

Source:

1. Nielsen & CGA Combined Market Read, Value Sales, 52 Wk to Dec 2017
2. Nielsen & CGA, Total Market, MAT TY to Dec 2017
3. Nielsen, Total Coverage, Value Sales, MAT TY to July 2017
4. IGD Food To Go Report, 2017

TOTAL SOFT DRINKS CONTINUED



Paying a premium

Consumers expectations for healthier, more convenient and more experiential solutions have presented an opportunity for operators to differentiate and add value.

At a total market level, value and volume sales of soft drinks grew at similar rates, but this trend masked the fact that the soft drinks category took steps to deliver the premium opportunity, developing ranges through premium NPD accounting for 43% of all launches, up from 30% in 2016¹.

In the licensed sector, premium soft drinks were a key growth driver up +32%. But more opportunity still exists, as premium share is still low at 7% versus spirits 30% & beer 43%².

Sustainable soft drinks

The wider environmental impact of the packaged food and drink industry was increasingly in the spotlight. With global recycling rates currently low and litter a growing concern, the increasing consumption of single use plastic and its end of life impact on the environment has rightly been called in to question.

The soft drinks industry has a role to play in minimising the impact of its activities on the environment. It must work hard to understand the causes of plastic waste, educate the consumers to recycle wherever possible and drive innovative packaging solutions which reduce the use of less sustainable materials.

Britvic have recently launched their sustainability platform 'A Healthier Everyday' to help achieve such goals.

Future soft drinks opportunities

In 2017, the soft drinks industry has demonstrated its ability to evolve within a dynamic environment and deliver strong performance. While the category has performed well, Britvic believe there is even greater potential for the future to inspire the entire industry to think differently.

Britvic have developed 'Drink Differently', fresh thinking for soft drinks growth. This is the Britvic vision for the future of the soft drinks category, with the potential to deliver £2.6bn of incremental soft drinks growth over 5 years.

5 category growth drivers have been identified capable of delivering sensational soft drinks, for every consumer, on every mission, in every occasion.



www.britvic.com/sustainable-business/healthier-people



Created for **kids**



Especially for **adults**



Inspired **lifestyle** choices



Elevated **food** moments



Sensational **social** experiences

Source:

- Nielsen Scantrack, Total Coverage, Value Sales, MAT TY to Nov 2017
- CGA On Premise Measurement Service, MAT TY to 30.12.17

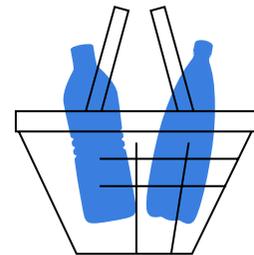
CHANNEL PERFORMANCE

The convenience channel continues to grow in 2017

2

2017 was yet another positive year of performance for the convenience channel. As a result of rising inflation, commodity price and retail expansion, the sector grew by 3.3% to be worth £39.2bn¹. That is ahead of the last two years and the total market, with four of the five key sectors all seeing value sales growth.

Multiples led the value growth at +7.9%¹ and strengthened its No2 position within the channel whilst symbols remained the biggest sector with the second largest value growth of +3.2%¹.



£39.2bn

Total value of convenience market

+3.3%¹
growth YA



45,652²

Convenience Stores numbers 2017

this means there are
+215 stores vs 2016¹
which is a +0.5% increase

344

Increase in the number of 'multiple' stores in 2017¹

+8.3%

CHANNEL SALES¹

■ Size ■ Share ■ Share growth

Convenience forecourts



YA: -0.3%

Co-operatives



YA: -0.4%

Unaffiliated independents



YA: -0.2%

C-store Multis



YA: +0.8%

Symbol groups



YA: -0.1%

Source:

1. IGD The UK Convenience Market 2017.

2. Adjusted numbers – Forecourts double-count covers stores operated under fascias that are also counted under symbols, multiples or co-operatives

**CHANNEL
PERFORMANCE**
CONTINUED

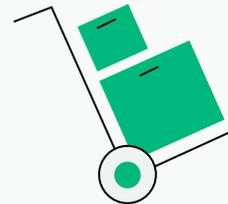
THE WHOLESALE CHANNEL REMAINS A £27.7BN MARKET¹

The wholesale market now accounts for £27.7bn, (taking in to account the removal of P&H), having experienced growth of +1.5%, driven by inflation. This was largely attributed to growth in the foodservice channel as retail sales overall were more challenging, with tobacco sales falling sharply. Soft drinks was the second fastest growing area in the retail sector seeing 8.6% growth¹.



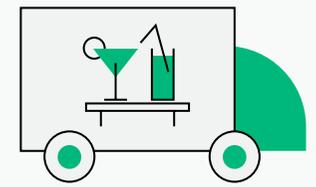
£8,674m*

Delivered grocery wholesalers



£11,491m

Primarily cash & carry



£7,511m**

Delivered foodservice wholesaler

* Includes £75m supplied from delivered wholesalers to foodservice catering and hospitality.

** Includes £113m supplied from delivered foodservice into retailers.

Source:

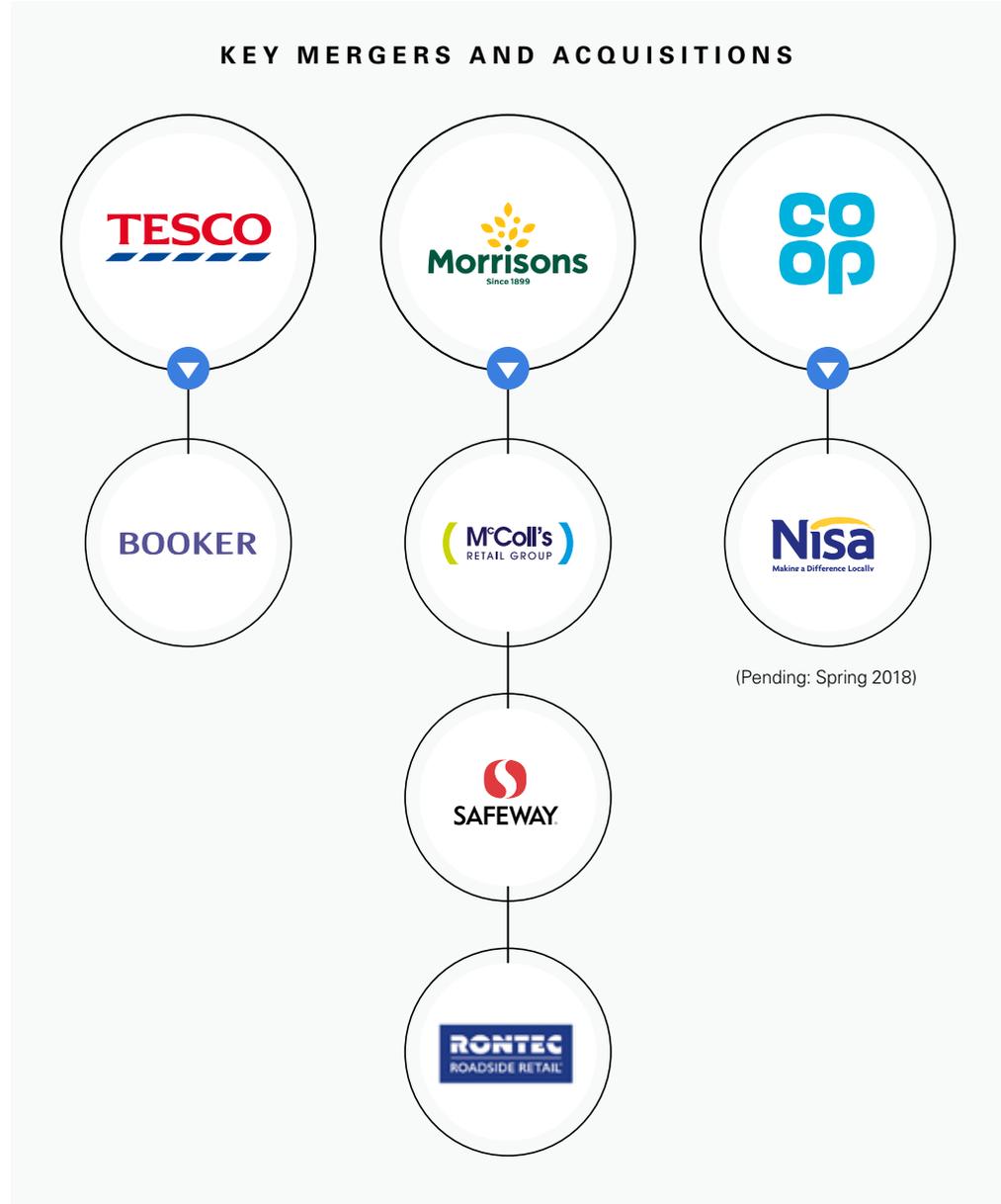
1. IGD UK grocery & foodservice wholesaling 2018



Step changing market consolidation hit the headlines

Several mergers and acquisitions were announced in 2017 which are set to change the shape of the convenience channel for years to come. The merger of Tesco with Booker heralded a landmark change to convenience, while further announcements from McColl's on its deal with Morrisons to supply its entire estate, as well as plans to revive the Safeway brand as part of a roll out

across its stores, signalled further shifts within the channel. There was still more to come as Morrisons announced its partnerships with Rontec and Co-op bought Nisa as part of its takeover, subject to approval from the Competitions & Markets Authority (CMA). With many of the changes yet to be implemented, it is impossible to say what this will mean for the channel moving forwards, though the landscape of convenience is likely to evolve as a result.



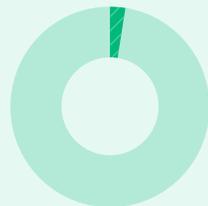
THE YEAR IN NUMBERS

TOTAL VALUE OF SOFT DRINKS IN CONVENIENCE & IMPULSE¹

£2.1bn
+2.3%

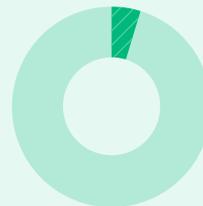
SUB-CHANNEL SOFT DRINKS PERFORMANCE IN C&I

SYMBOLS & INDEPENDENTS



£1.47bn
+0.5% value growth²

PETROL & TRAVEL



£358.5m
+4.9% value growth³

HIGH ST



£278.2m
+8.8% value growth⁴

Source:

1. IRI Marketplace Total Convenience GB 52 weeks to the 24 Dec 2017

2. IRI Marketplace Symbols & Independents GB 52 weeks to the 24th Dec 2017

3. IRI Marketplace Petrol & Travel GB 52 weeks to the 24th Dec 2017

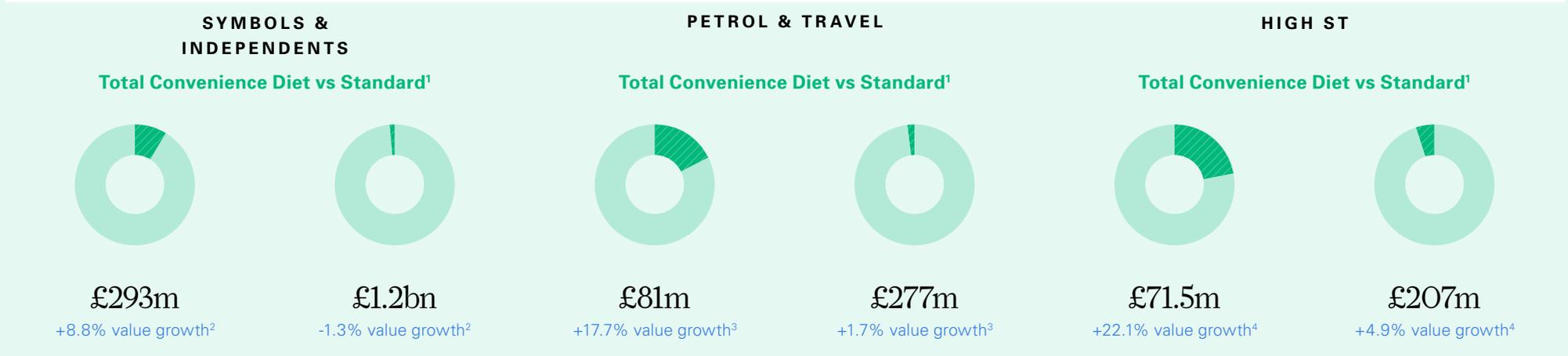
4. IRI Marketplace High St GB 52 weeks to the 24th Dec 2017

THE YEAR IN NUMBERS

DIET VS STANDARD TOTAL CONVENIENCE¹

DIET			STANDARD		
GROWTH	ABSOLUTE GROWTH	SIZE	GROWTH	ABSOLUTE GROWTH	SIZE
+12.3%	£48.9m	£446m	-0.1%	-£1.6m	£1.6bn

SUB-CHANNEL DIET VS STANDARD



Source:

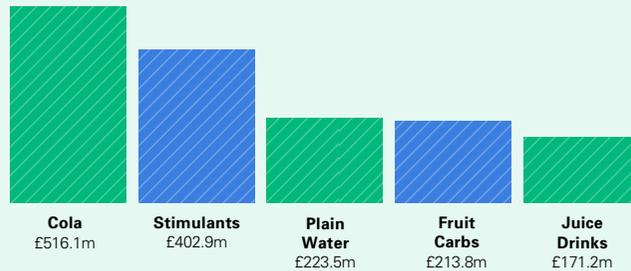
1. IRI Marketplace Total Convenience GB 52 weeks to the 24 Dec 2017
 2. IRI Marketplace Symbols & Independents GB 52 weeks to the 24th Dec 2017

3. IRI Marketplace Petrol & Travel GB 52 weeks to the 24th Dec 2017
 4. IRI Marketplace High St GB 52 weeks to the 24th Dec 2017

THE YEAR IN NUMBERS

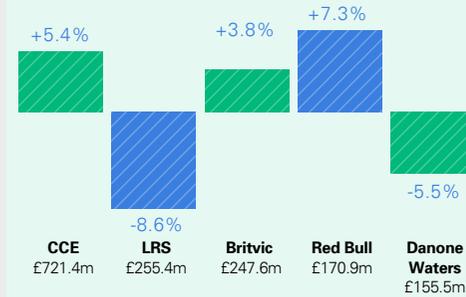
TOP 5 SEGMENTS IN VALUE

Based on sales value



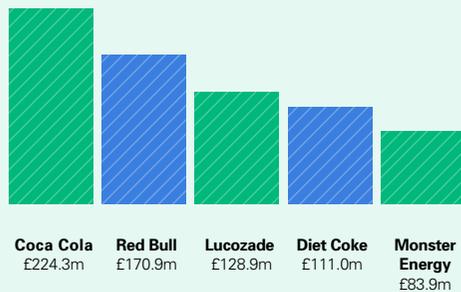
TOP 5 DISTRIBUTORS

% Growth/Value Sales



TOP 5 BRANDS

Ranked by Value sales



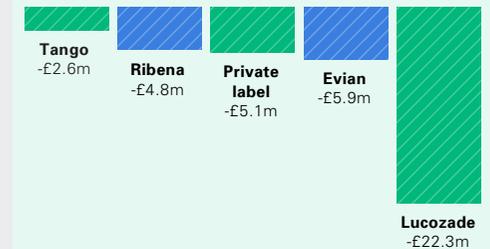
TOP 5 BRANDS IN GROWTH IN TOP 25 BRANDS

Ranked by the biggest Value ABS diff vs YA



TOP 5 BRANDS IN DECLINE IN TOP 25 BRAND

Ranked by the lowest 'Value ABS diff vs. YA'



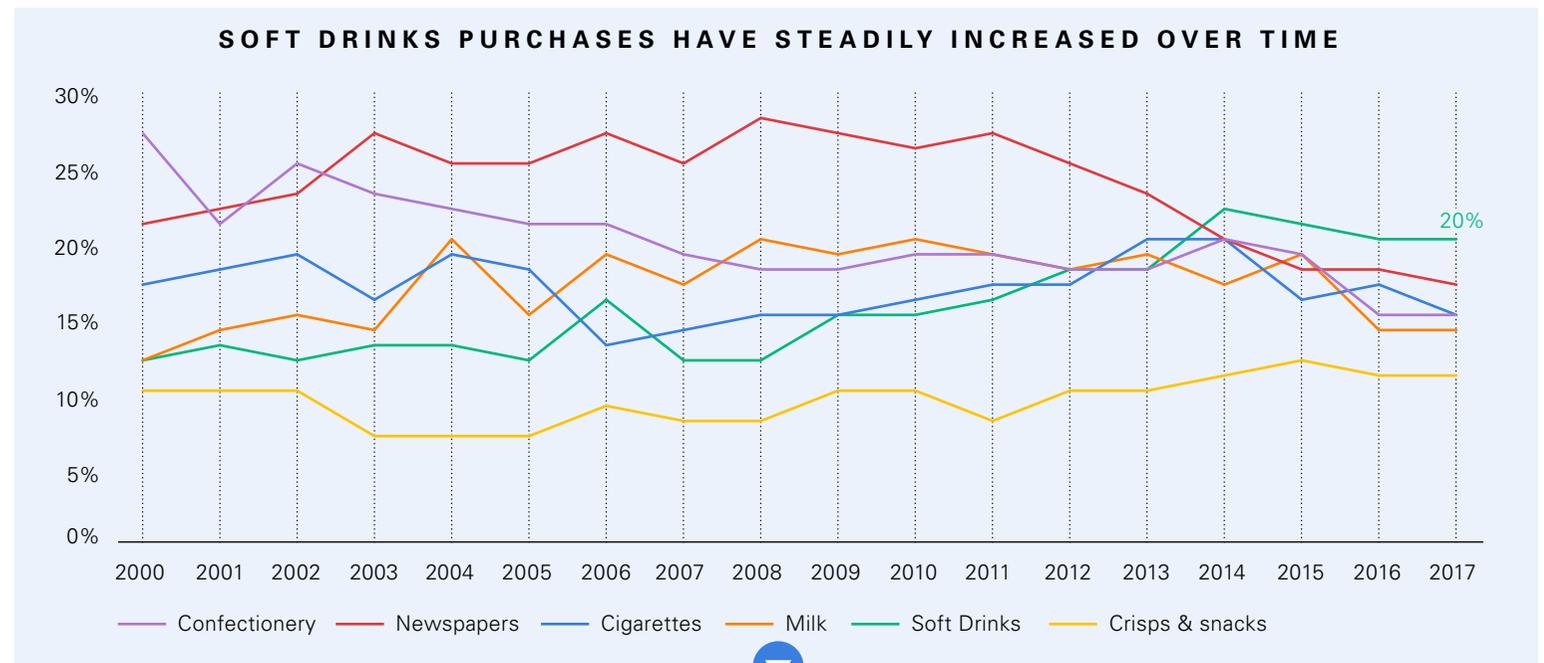
Source: IRI Total Marketplace Total Convenience GB: 52weeks to the 24th of Dec 2017

REVIEW SUMMARY

SOFT DRINKS RISE AGAIN IN IMPORTANCE

Soft drinks was one of the top performing categories across convenience in 2017, growing by +2.3%¹, and maintaining its position as the largest segment in terms of total number of units bought². A soft drink featured in 20% of all baskets³, ranking it as the No.1 category in terms of basket penetration, ahead of the likes of newspapers and milk for the fourth year running.

Purchasing a soft drink remained the No.3 main reason for visiting a store overall, however, when split by age, it was actually the No.1 main reason for visiting a store for the younger generations⁴. In fact, if you look at Generation Z (16-24 year olds), nearly half of all shoppers bought a soft drink (43%) when visiting, increasing to over half when they are on a food to go mission⁴. Given food to go maintained its importance in the channel (ranked No.3),⁴ it made them an important shopper for retailers to attract.





1

Soft drinks are the No1 category in terms of basket penetration³



1/5 of all baskets that go through a c-store contain a soft drink³.
In **Forecourts** this is even higher at **23%**³

Source:
1. IRI Marketplace Total Convenience GB: 52 weeks to the 24th December 2017.

2. Nielsen, Britvic Quarterly Bigger Picture report. Total Impulse, Unit Sales (M), MAT Period ending 30.12.2017

3. HIM CTP 2000-2017
4. HIM CTP 2017

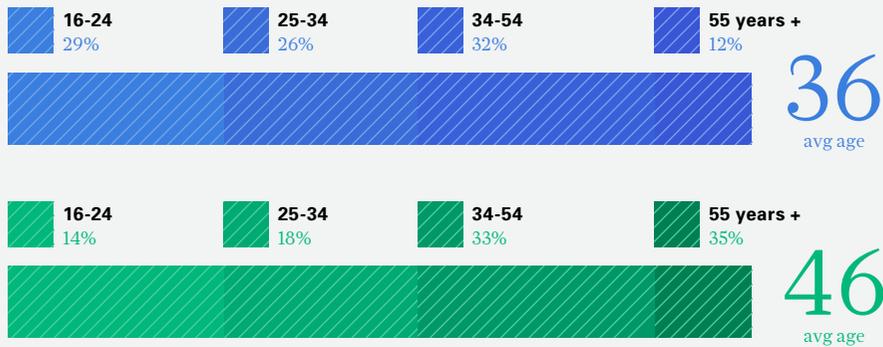
REVIEW SUMMARY
CONTINUED

SOFT DRINK SHOPPER IS MORE VALUABLE TO A C-STORE¹

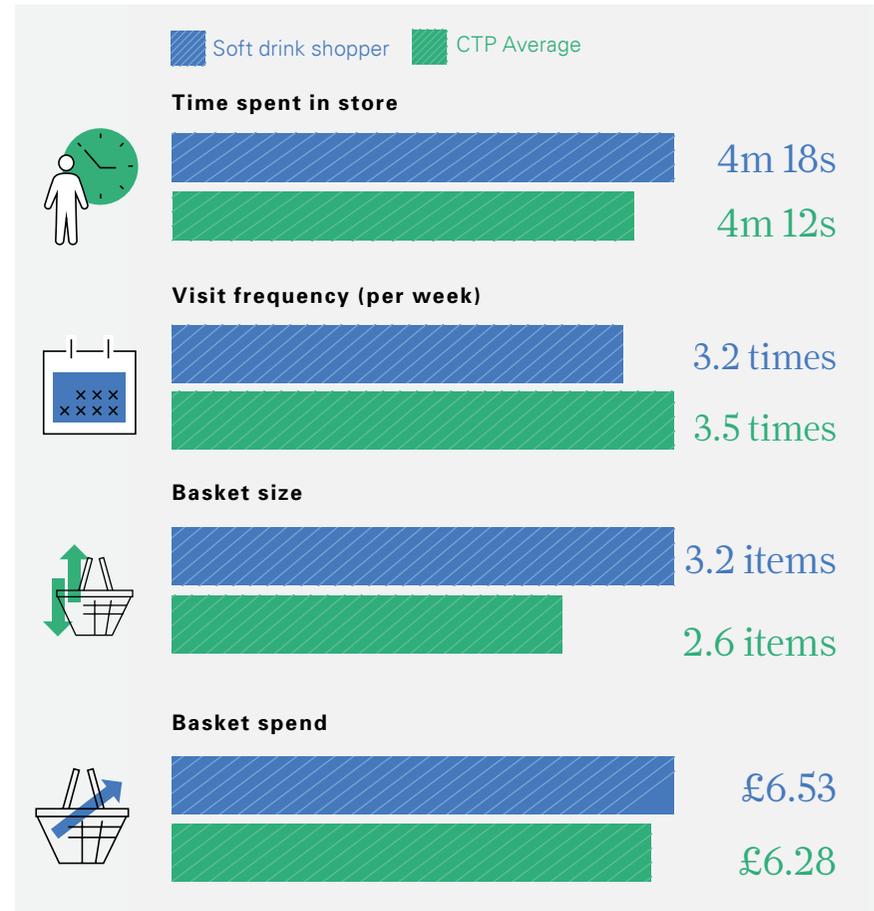
BASKET SIZE AND SPEND OVER TIME CTP AVERAGE

Age	16-24	25-34	35-54	55+
Basket size	3.0	3.2	3.3	3.8
Basket spend	£5.76	£6.18	£7.05	£7.89

AGE OF SHOPPER



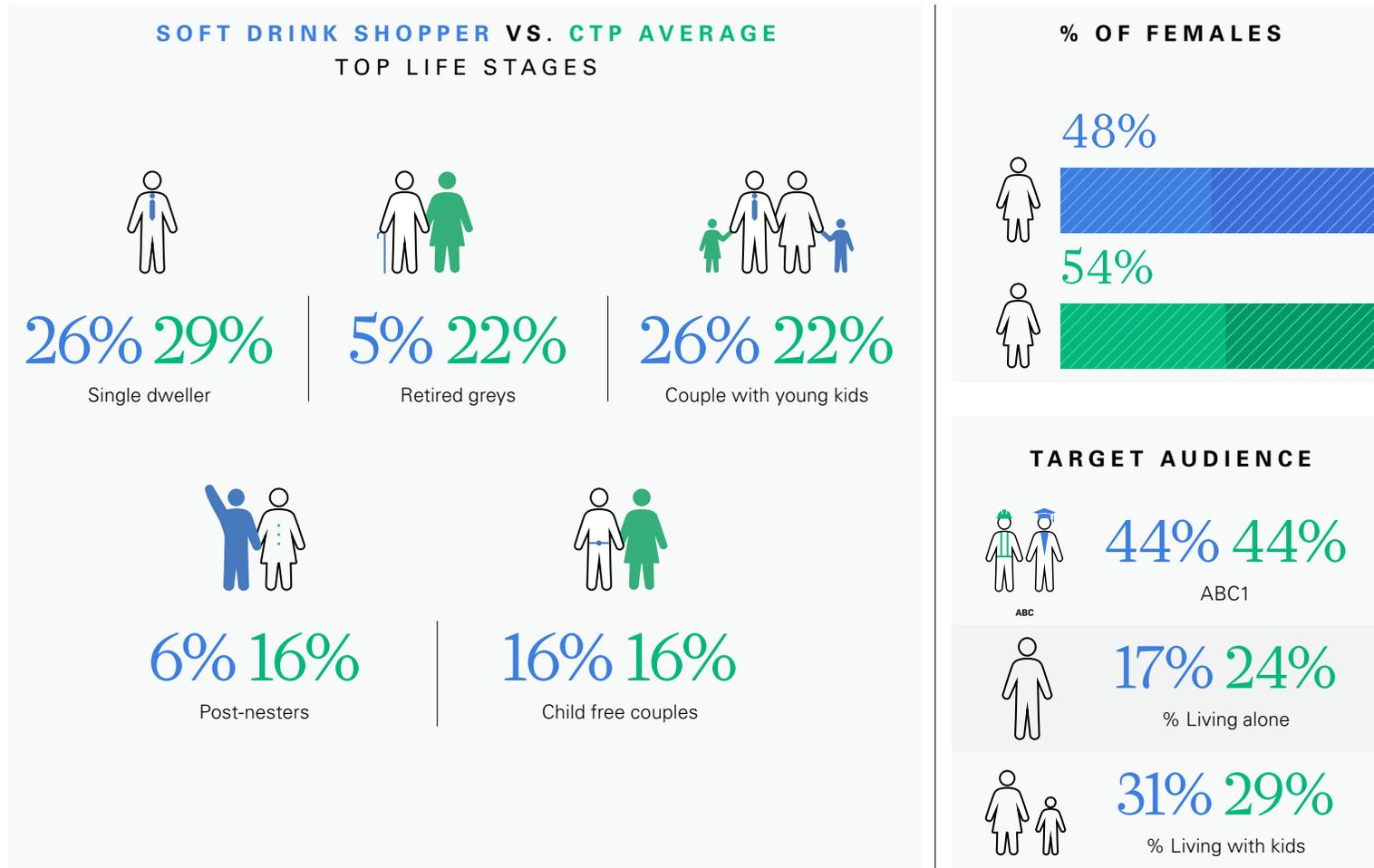
THE SOFT DRINKS SHOPPER VS THE AVERAGE SHOPPER



Source:
1. HIM CTP 2017

REVIEW SUMMARY
CONTINUED

WHO IS THE SOFT DRINKS SHOPPER IN 2017¹



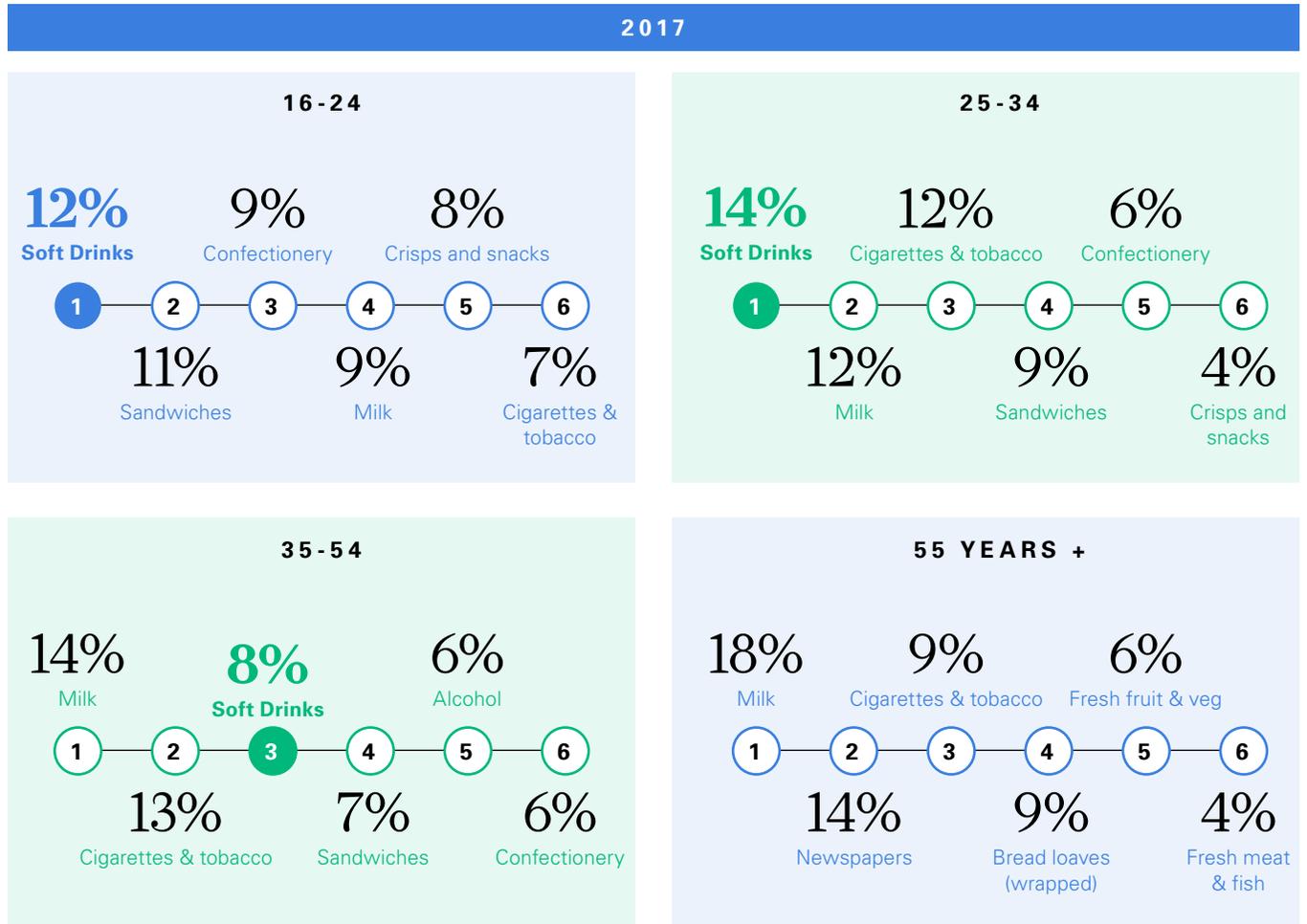
Source:
1. HIM CTP 2017

REVIEW SUMMARY
CONTINUED

SOFT DRINKS ARE THE THIRD BIGGEST FOOTFALL DRIVER TO A C-STORE¹

	CTP 2016	CTP 2017
	14% Milk	14% Milk
	11% Cigarettes & Tobacco	11% Cigarettes & Tobacco
	10% Soft drinks	7% Soft drinks
	8% Newspapers & magazines	7% Newspapers & magazines
	5% Sandwiches	6% Sandwiches
	7% Bread loaves (wrapped)	6% Bread loaves (wrapped)

NO 1 FOR BOTH 16-24 AND 25-34 YEAR OLDS



Source:
1. HIM CTP 2017

REVIEW
SUMMARY
 CONTINUED

Soft Drinks are key to driving retailers to depot

The importance of the category was mirrored in wholesale, where soft drinks was cited as the main reason for visiting a depot, ahead of tobacco and beer & cider¹. Research showed that soft drinks retailers also typically spent more than the average retailer in depot, highlighting their importance.

TOP 3 MAIN REASONS FOR VISITING A DEPOT¹



Source:
 1. HIM Retailer Cash & Carry Wholesale 2017



What Were the Key Soft Drinks Influences from 2017 and What Are the Key Considerations for 2018?



CONVENIENCE HARNESSES HEALTH OPPORTUNITY



The overall health trend continued to play a key role in convenience. As more consumers opted for healthier solutions, sales of diet¹ soft drinks, (including low calorie and low sugar drinks) drove absolute value sales growth across all the sub channels¹ increasing by +12.3% and adding £49m value sales¹. This was in comparison to the standard (all other drinks) sector, albeit still four times larger than diet, it declined by -0.1%. This trend was particularly prevalent in the immediate refreshment segment with growth coming through from diet at +12% with decline in standard at -0.8%¹. Whilst in top up there was growth in all other drinks, diet still outshone this performance with +13% value growth¹.

While the health trend was certainly established in convenience, consumers continued to demand choice and as a result, despite seeing a decline, all other soft drinks still accounted for a large proportion of sales with 79% of value coming from this sub sector¹. In line with this, value sales of all other soft drinks brands were up in 2017 with both cola brands seeing growth, with Coca Cola Regular at +2.4% and Pepsi Regular at +4.1%¹.

This trend was particularly evident within symbols and independents, as well as petrol and travel sectors. However, looking ahead, as consumers continue to move towards healthier solutions and the soft drinks industry levy is implemented, we can expect to see this shift continue with greater growth coming through from diet segment.

+12.3%

Sales growth of diet soft drinks¹

+12%

Sales growth of immediate diet soft drinks¹

+13%

Sales growth of top-up diet soft drinks¹



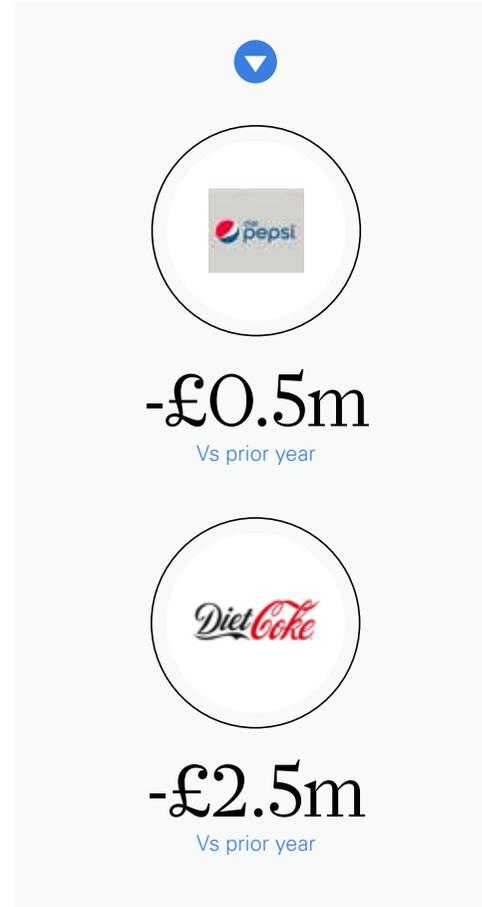
Source:

1. IRI Marketplace Total Convenience GB: 52 weeks to the 24th December 2017

2

COLA CONTINUES TO ADD FIZZ TO SOFT DRINK SALES

Last year, the biggest sub categories continued to grow in convenience and this was no exception for the largest of them all, cola. 2017 saw cola grow by £21m (+4.2% value growth) with 76% of this growth coming through from the diet segment (+6.9%)¹. As consumer demand continued to move towards healthier soft drinks, leading low calorie cola brands benefitted with Pepsi Max growing the most in absolute value, up £10.9m vs prior year and Coke Zero up £7.9m¹. However, not all diet cola brands saw the same trajectory with Diet Coke declining by -2.2%¹.



Source:

1. IRI Marketplace Total Convenience GB: 52 weeks to the 24th December 2017

3

STIMULANTS SPEED UP WHILST GLUCOSE AND SPORTS STARTS TO LOSE ENERGY

2 017 was a tale of three energy segments (sport, stimulant and glucose) experiencing very different performances. The second largest segment in soft drinks (stimulants) saw the biggest absolute growth in all soft drinks sub categories, up £31m¹ and driven predominantly by strong performance of Monster, Rockstar and Red Bull Energy brands¹.

Only 11% of value in stimulants came from low calorie products¹, indicating that the sub category was a lot further behind others in terms of its health perceptions, but remains an opportunity for the future. In fact, low calorie

sales in stimulants did see growth of nearly 9.8%¹ and also natural energy brands, such as Purdey's, grew +48% and became a £3m brand in the convenience market¹.

On the flipside, both the sport (-5.8%) and glucose segments (-14%) saw significant decline¹. This was driven in particular by Lucozade which saw -3.3% value decline of Lucozade Sport (-£1.6m)¹. Lucozade Glucose also declined (-£22m) within the same year its reformulated recipe was brought to market¹.

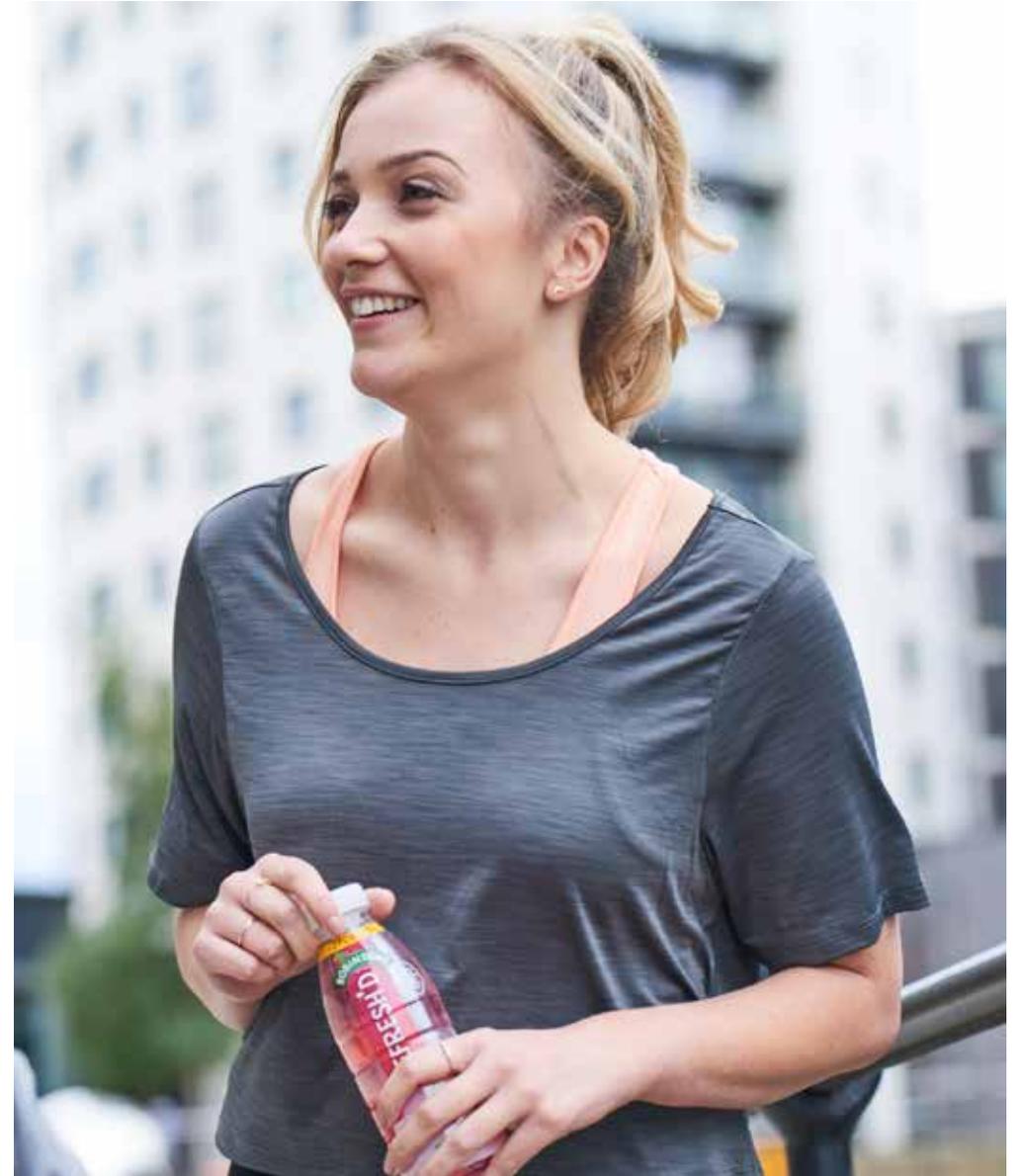


Source:
1. IRI Marketplace Total Convenience GB: 52 weeks to the 24th December 2017

4

**PLAIN WATER
CONTINUES TO
GROW AND WATER
PLUS ADDS SOME
FLAVOUR TO
PERFORMANCE**

The trend of recent years also continued in 2017 with growth of plain water adding +£4.8m value sales (+2.2%) making it the 3rd largest sub category in convenience¹. However, this positive performance was significantly outshone by the smaller, water plus sub category. Despite only being the 7th largest sub category, it was the 3rd highest in absolute value growth, adding £13.7m and growing at 13.3%¹. Three brands, Rubicon Spring, Glaceau Smartwater and Robinsons Refresh'd, contributed at least £3.7m¹ in absolute value growth each as shoppers looked for water with something extra, be it added functionality or a bit more flavour. The emergence of this trend and rising sub category was further evidenced by Robinsons Refresh'd being named as the No.1 soft drinks launch of 2017 in the total market².



Source:

1. IRI Marketplace Total Convenience GB: 52 weeks to the 24th December 2017
2. Nielsen: Total Coverage NPD: data to 23.12.17

5

TRADITIONAL TOP UP CATEGORIES WERE ALSO BUOYANT

In 2017 top-up categories represented 26% of the value sales in soft drinks but delivered 55% of the growth. The performance of sub categories such as mixers and dilutes that sit in top-up ambient fixture rather than the immediate refreshment chiller indicated that the top-up shopping mission performed particularly well. A great example of this is the 'gin effect' which hit the convenience market and saw sales of mixers enjoy +16.5% absolute growth (£2.4m), with Fever Tree contributing half of this¹. It was also a strong year for dilutes which saw the value growth of +6.3%, driven predominately by the positive performance of Vimto and Robinsons in the channel¹.



+£0.7m
Robinsons NAS Squash¹

+£1.1m
Fevertree¹

Source:
1. IRI Marketplace Total Convenience GB: 52 weeks to the 24th December 2017

6

RIGHT CHOICE, RIGHT VALUE CONTINUED IN 2017

As predicted in the Britvic 2016 Soft Drinks Review, competition within convenience continued to increase. It was essential for retailers to drive the right choice and offer value to shoppers. This was across everything from stocking the right range, and giving the right space for appropriate new products, as well as providing value added offerings such as price marked packs (PMPs).

In 2017, we saw sales of PMPs contribute over 56% of value sales¹ in the symbols and independents channel and increase its proportion versus 2016. Percentage growth in PMPs also outshone standard packs indicating that both retailers and consumers were backing them even more than the previous year¹.

The emergence of several new PMPs into market, including the Britvic PMP £1 or 2 for £1.50 dual promo, offered choice to the consumer through its availability across a wide range of its immediate refreshment portfolio.

In terms of new products, we also saw a trend towards premiumisation in the sector. 25% of new product launches were premium versus 20% in 2016². Whilst convenience saw an increase, it was well behind the grocery multiples which saw a move from 30% to 43% of new premium products being launched². This highlights that there has been less of an uptake of premium products in the convenience channel and remains an opportunity for the future.



Source:

1. IRI Marketplace Total Convenience GB: 52 weeks to the 24th December 2017
2. Nielsen Scantrack, Total Grocery Mults & Impulse, 52 weeks to 25.11.17 (Premium is defined as having more than 200 price index to its segment).

FUTURE OUTLOOK

THE FUTURE FORECAST FOR CONVENIENCE



oft drinks is an incredibly important category for all retailers operating within the convenience channel. As trends in the market change over time, it is important for retailers to adapt to support future soft drinks growth and ensure their offering is fit for purpose.

Britvic has identified a number of key trends through its Drink Differently category vision including some important growth drivers that will help retailers capitalise on these opportunities and deliver soft drinks sales success in 2018 and beyond.

PURPOSE		ACTIVATION PLATFORMS							
<p>CREATED FOR KIDS</p>	<p>CREATE TASTY, HEALTHY & EXCITING SOFT DRINKS WHICH ARE LOVED BY KIDS AND TRUSTED BY PARENTS</p>	<p>CREATED FOR KIDS</p> <table border="1"> <tr> <td>COOL FOR KIDS</td> <td>KIDS' DRINK FOR EVERY OCCASION</td> <td>GROW UP WITH EVERY KID</td> <td>HELP PARENTS SAY YES</td> </tr> </table>				COOL FOR KIDS	KIDS' DRINK FOR EVERY OCCASION	GROW UP WITH EVERY KID	HELP PARENTS SAY YES
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<p>ESPECIALLY FOR ADULTS</p>	<p>MOTIVATE MORE ADULTS TO CHOOSE SOFT DRINKS, BECOMING THEIR PREFERRED CHOICE ON MORE OCCASIONS</p>	<p>ESPECIALLY FOR ADULTS</p> <table border="1"> <tr> <td>ENERGY FOR LIFE</td> <td>CRAFTED WITH CARE</td> <td>HEALTHY HEROES</td> <td>WONDERFUL WARMERS</td> </tr> </table>				ENERGY FOR LIFE	CRAFTED WITH CARE	HEALTHY HEROES	WONDERFUL WARMERS
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TAILOR MY FLAVOUR	MAGICAL MIXED DRINKS	PROGRESSIVELY PREMIUM							

76%

Of UK adults had food on-the-go²

10bn

Food to go trips³

45%

Of shoppers were on a food to go mission in 2017¹

1 TARGETING SOFT DRINKS MISSIONS MORE EFFECTIVELY

Top up remains the No.1 mission across Convenience¹. This is followed by food to go (No.3) and meal for tonight (No.6)¹. These mission trends have remained fairly steady over time but should be an increasing area of focus for retailers as they look to capitalise on the category, as soft drinks continue to play an important part in all of these missions.

Food to go 2.0
76% of all UK consumers had food to go in the last month². There have been 10bn food to go occasions in the last year³, yet soft drinks were only bought on 26% of occasions⁴. Therefore, there remains a big opportunity to link more soft drinks with food to go. In fact, food to go is a key mission for soft drinks. In 2017, 45% of shoppers were on a food to go mission when buying a soft drink¹. However, shoppers aged over 24 are less engaged than the younger generation as 59% of Generation Z who have bought a soft drink are on a food-to-go mission¹. So, it's important to appeal to this shopper, which is more demanding in terms of fast speed of service and availability of products, in order to satisfy their needs.

Food to go set to flourish in forecourts
While mission trends have remained pretty consistent within total convenience in recent years, there has been a significant shift in forecourts. According to HIM CTP 2017, the 'fuel' mission has now moved below both 'food to go' and 'top up' as the main mission¹.

Social Food Solutions
19% of adults do not drink alcohol, with a slightly higher proportion of women (22%) than men (17%) being teetotal⁵.
32% of consumers said they have limited or reduced the amount of alcohol they have drunk in the last 12 months (Nov 2016)⁵. This presents an opportunity for retailers to tap into this trend using relevant soft drink socialising solutions.

CATEGORY DRIVER



ACTIVATION PLATFORM

FOOD TO GO 2.0

SOCIAL FOOD SOLUTIONS

Source:
1. HIM CTP 2017
2. MCA Food To Go Market Report 2018, sample of 2086 UK 16+ aged consumers

3. Kantar Worldpanel, Out of Home Purchase, 52we, 25 Feb 18 (excluding; Takeaway, restaurants, pubs, bars & hotels)

4. Kantar Worldpanel, Out of Home Purchase, 52 we, 31 Dec 17
5. Mintel: Attitudes towards Low and non alcoholic drink – UK – February 2017

What does this mean for retailers?

Ensuring unmissable availability and focusing on initiatives, like linking meal deals with soft drinks and food via relevant innovation, communication and activation are ways of driving this opportunity harder to deliver future soft drinks growth in the food-to-go category.

Tactics such as more off shelf feature displays, seasonal promotions and creating occasions such as big night in, meal for tonight and sports events, will help raise visibility of soft drinks in store, making the most of the opportunity in social food occasions.

Shining the light on forecourts

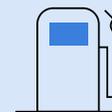
Versus the CTP average of 7%, soft drinks is stated as the main reason for visiting store by 10% of forecourt shoppers¹, meaning they hold even more importance in this channel. Forecourts tend to overtrade in sub categories such as glucose stimulants (37% of value in petrol roadside multiples vs 30% total convenience²) where the energy mission plays an important role. However, in the last year there has been some switching out of the glucose stimulants sub category in forecourts into the likes of water, water plus and carbonates categories³. This is another indication that shoppers were looking towards more healthier choices.

Forecourt retailers need to ensure that as well as catering for the traditional energy mission, they also need to consider their range offering in terms of health. Stocking a wider selection of no added sugar options across energy, carbonates, water and water plus sub categories, as well as considering healthier options from brands that offer more natural energy, will be key to capitalising on this trend.

THE SIGNIFICANCE OF THE FUEL MISSION HAS FALLEN IN RECENT YEARS¹

Forecourt main shopper missions YOY change (2013-2017)

FOOD-TO-GO	TOP-UP (TOTAL)	FUEL	NEWS-AGENT	TREAT
23%	21%	18% 2017	17%	12%
▲	▲	▼	▼	▲
22%	12%	33% 2013	20%	7%



The significance of the fuel mission has decreased significantly since 2013, with mission penetration almost halving¹.



Shoppers are still purchasing fuel, but their main reason for visiting is changing and shoppers are using forecourts more often as convenience stores. As more forecourts tap into the food to go trend, 70% are now offering hot food to go in comparison to 47% in traditional convenience stores¹. As they become greater destinations, 22% of forecourts are also now offering a specific area for eating and drinking, way ahead of convenience stores at 4%¹.

Source:

1. HIM CTP 2017
2. IRI Marketplace Roadside-Petrol Multiples GB 52 weeks to the 24th December 2017
3. Kantar Worldpanel, OOH, Multiple Forecourts (Britvic defined), Switching 52 w/e 03.12.17

2 CONSUMER DEMAND FOR HEALTH WITHOUT COMPROMISE ON TASTE

The convenience channel has a high proportion of its sales in the standard category. With the announcement of the soft drinks industry levy, there have been several reformulations already brought to market. However, the current picture shows that there is an estimated £447m litres at risk of the impact of the levy in convenience¹.

When asked, 47% of shoppers said they expect to see soft drinks prices rise, however 50% of shoppers think that healthier options typically cost more².

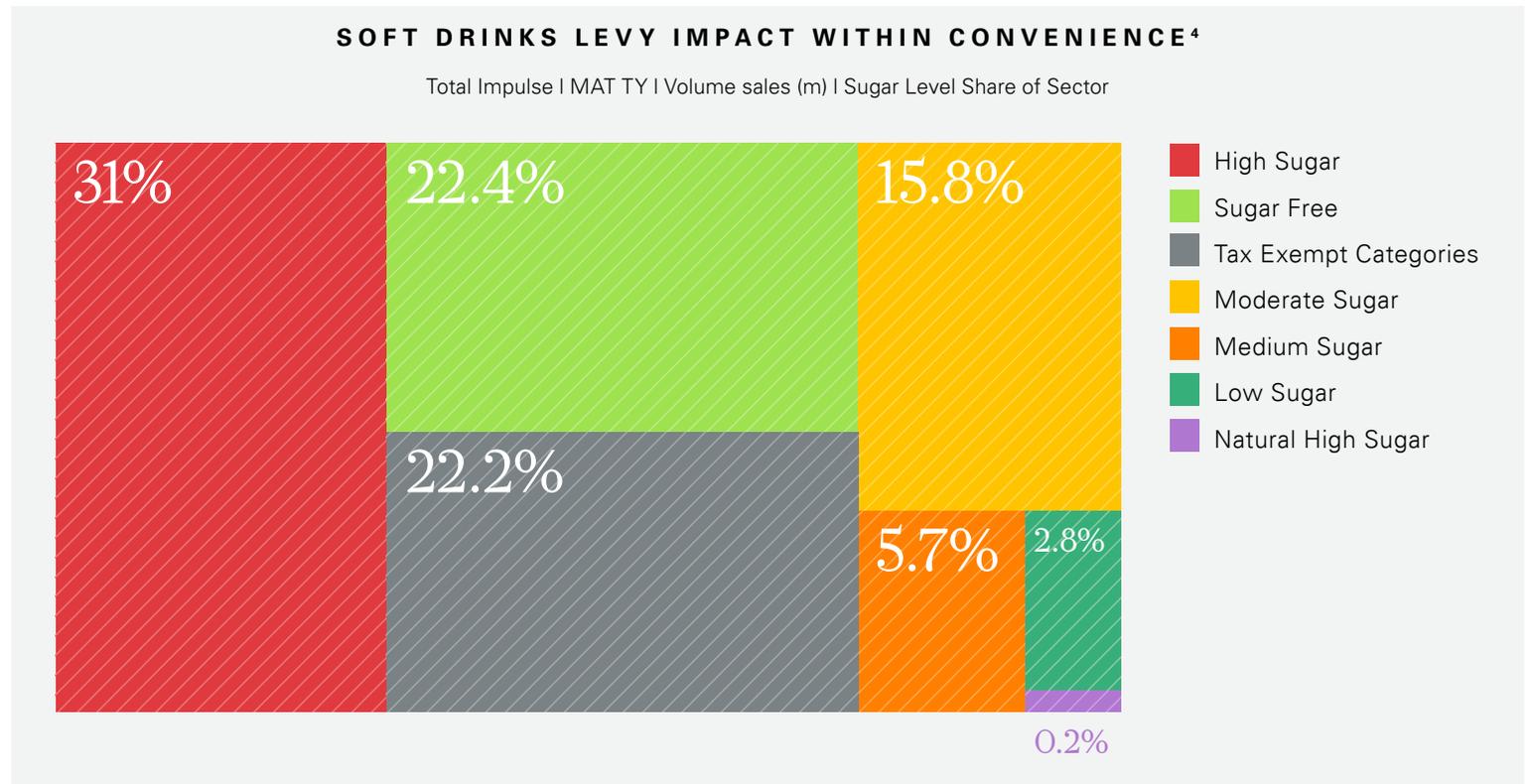
When looking for a healthy soft drink, 50% of consumers look at sugar content, 31% look at calories, 28% whether its natural and 19% whether it is fresh².

As in 2017, the majority of growth either at a top line level, or within most sub categories, was driven by the diet sector³. This shows that the health trend, as well as the subsequent shift towards more perceived healthier products and sub categories, is having an impact on the channel.

What does this mean for retailers?

Retailers will need to ensure that they keep up with the trends being seen in the market and ensure their ranges are fit for purpose. Doing so will also help offset the exposure of volume that is liable for the soft drinks industry levy.

Retailers should consider dedicating enough space to emerging healthier categories like water, water plus, cleaner healthier energy and no added sugar carbonates, to tap into these health trends, as described in these following drivers.

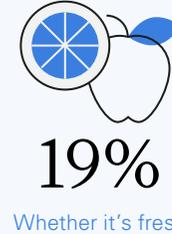


Source:

1. Nielsen Scantrack, Total Impulse, Volume sales £m, Britvic definition, MAT we 17.02.18 (includes Cola, Energy and Stims, Fruit Carbs, Lemonade, Juice Drinks, Non Fruit Carbs)
2. HIM online survey 2017

3. IRI Marketplace Total Convenience GB 52 weeks to the 24th Dec 2017
4. Nielsen Scantrack data, Britvic definition, Total Impulse, vol sales (m), Sugar Level Share of Sector, MAT, WE 17.02.18

WHEN LOOKING FOR A HEALTHY SOFT DRINK, WHICH OF THE FOLLOWING DO YOU CONSIDER? ⁵



CATEGORY DRIVER



ACTIVATION PLATFORM

HYDRATION FOR THE NATION

TASTE WITHOUT COMPROMISE

SUSTAINABLE SOFT DRINKS

CATEGORY DRIVER



ACTIVATION PLATFORM

ENERGY FOR LIFE

Hydration for the nation

Water plus continues to be an undertrade in convenience despite water plus seeing more value growth than plain water in convenience¹ so it is important for retailers to focus on this growing sub category and stock soft drink solutions that hydrate, taste great and offer more natural ingredients.

Taste without compromise

Taste is the No.1 factor when choosing a soft drink², but consumers are increasingly looking for healthier choices too. Therefore retailers need to consider this and maximise the opportunity by providing a range of healthy drinks, which don't compromise on taste. If switching from a full sugar soft drink, 23% of shoppers would look to switch to a diet equivalent version of their favourite brand². As a result, to take advantage of this trend, it's essential that retailers stock more low sugar options of popular brands. Choice is still important for consumers, however, if retailers get it right, they will be attracting a more valuable shopper as the sugar free shopper visits stores more often and buys more volume than the full sugar shopper³.

Energy for life

In convenience energy drinks makes up 30% of total sales which makes this an important subsector in convenience¹. However, with penetration in this sub category the third lowest in soft drinks and plateauing⁴, there is limited growth from existing shoppers. An emerging sub-category, including brands like Purdey's and SunSoul, was notable in 2017 as more natural energy products appeared on shelf. Purdey's led the way, worth £3.3m, adding £1m absolute value YOY, and growing +48% YOY¹, with a launch into cans in late 2017 to support future growth in a format more associated with energy.

Source:

1. IRI Marketplace Total Convenience GB: 52 weeks to the 24th December 2017.
2. Britvic Health research 2015
3. Kantar Worldpanel, Take Home Purchase, 52we, 28 Jan 18, Total Carbonates

4. Kantar OOH Panel, 52 weeks, Total Market, Data to w.e 25.02.18
5. HIM online survey 2017

3 YOUNGER GENERATIONS TO BREATHE NEW LIFE INTO SOFT DRINKS

A ccording to the IGD, the post millennial generation has a higher predisposition to shop in convenience stores across a range of missions¹. Soft drinks consumption peaks between those aged 5-24.² Therefore, not only does the younger adult generation consume more soft drinks², they are also more likely to be on a food- to-go mission than any other age groups³. This means that soft drinks is a key category for the younger generation and it is therefore important to future proof ranges to match the trends and expectations that they have. This can vary widely from the demands and missions of general shoppers.

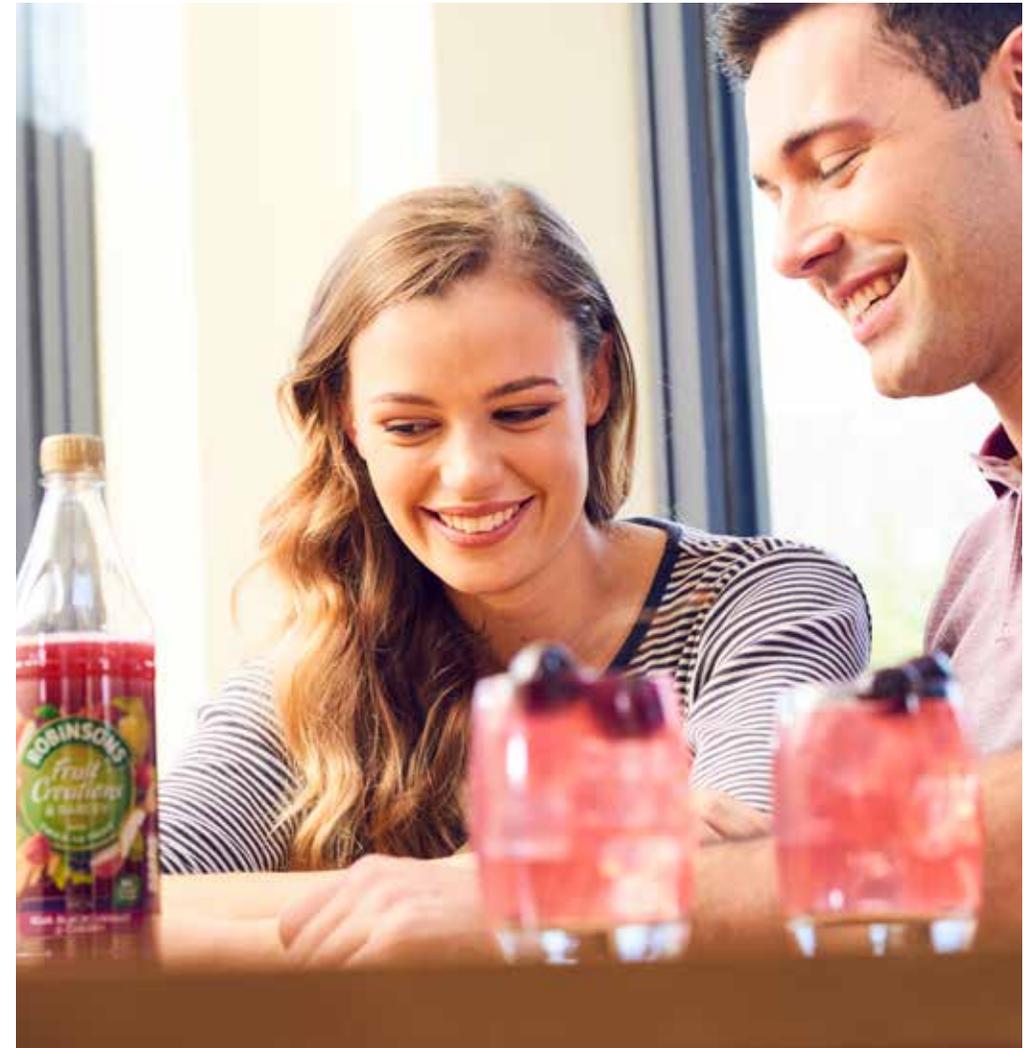
What does this mean for retailers?

Soft drinks is the main reason for Gen Z to visit a c- store³. With the trend towards even busier on-the-go lifestyles and more shopping in convenience stores throughout out the day, it's important that the availability of soft drinks is maintained all day, every day.

Retailers can attract Generation Z shoppers through a quality food-to-go solution by offering a good selection of chilled soft drinks with food via meal deals or promotions. Retailers should make sure these offers are attractive and visible via point of sale and in store activity to help grab the attention of shoppers

As health continues to be a focus for most shoppers, but not at the expense of taste, retailers should offer a strong breadth of choice, including both low and no sugar options, as well as drinks that offer more sustained energy, appealing to a wide range of shopper needs.

Having a quality in store experience is particularly important for the younger generation so retailers should give just as much attention to the service customers receive from staff, as the store environment, layout and range of soft drinks on offer to cater for the demands of younger shoppers.



Source:

1. IGD the UK convenience market 2017
2. Kantar Worldpanel, At-home & carried Out Usage, 52we, 13 Aug 17
3. HIM CTP 2017

DEFINITIONS / GLOSSARY

Convenience – In the Britvic C&I report data, IRI total Convenience read covers: High Street stores, Symbols and Indies, Petrol Multiple Forecourts and Travel stores.

Soft Drinks Formats – Immediate Refreshment - includes all products that are 600ml or less and also includes Water/Water Plus products with a sports cap upto and including 1L. Deferred (Top Up) = All other sizes

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. Coke Zero) are items described as No Added Sugar, NAS, N.A.S, or Sugar Free. Standard - All Other Products including Plain Water.

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

Cold Hot Drinks – Includes cold soft drinks that are tea based such as Lipton Iced Tea .

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

Glucose – A Energy drink which is glucose based such as Lucozade energy

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.

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

Pure Juice – 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.

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

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

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

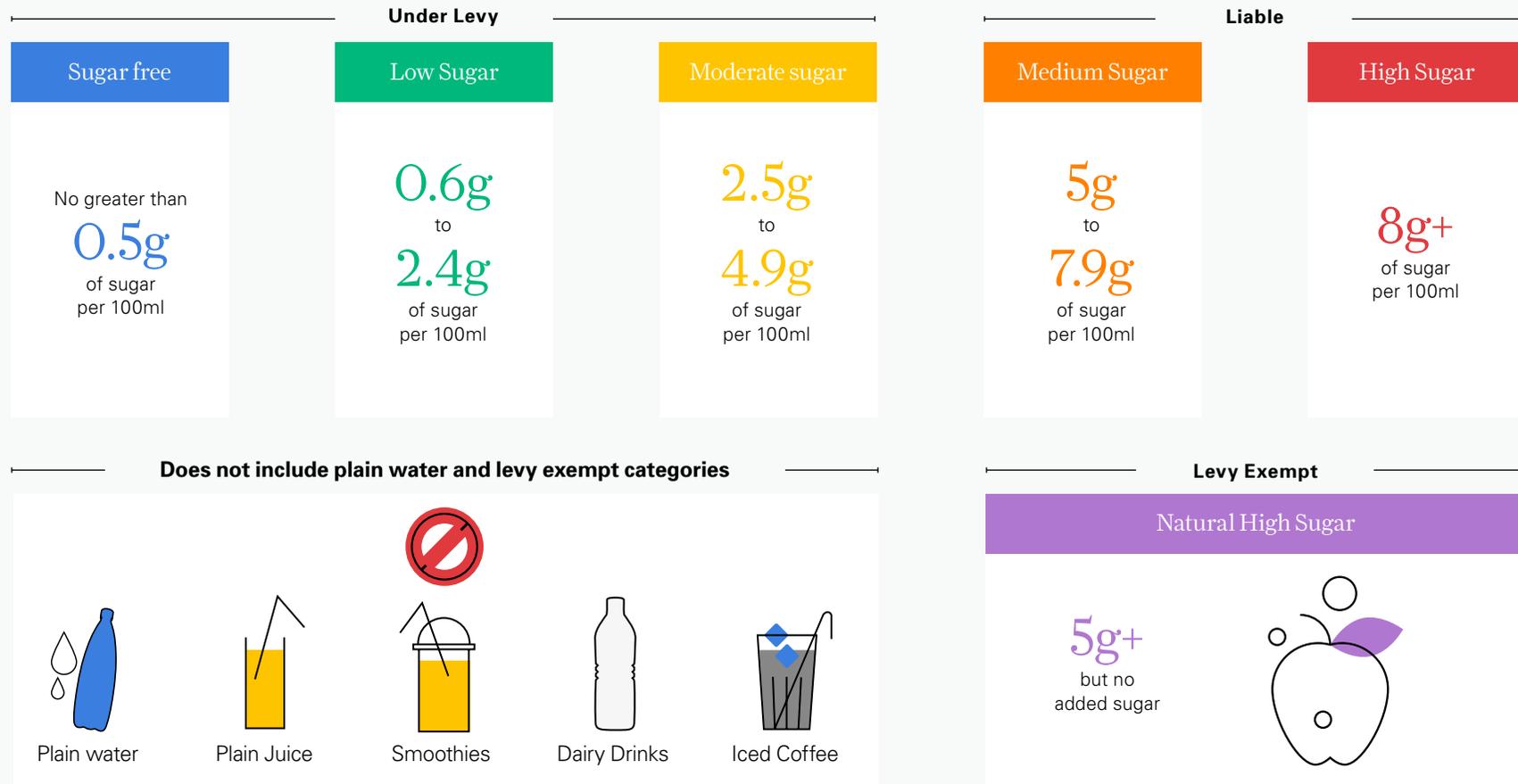
Traditional Mixers – All drinks intended to dilute an alcoholic beverage, as well as being consumed as a standalone soft drink.

Water – Still or sparkling water with nothing else added.

Water Plus / Flavoured water – Sparkling or still flavoured water.

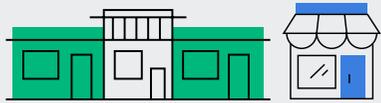
HOW HAS BRITVIC SEGMENTED THE SOFT DRINK MARKET BASED ON SUGAR LEVELS?

In line with the proposed levy, each product in a liable category has been coded based on the sugar content per 100ml



Source:
Nielsen / Britvic definition

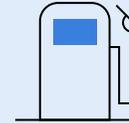
CONVENIENCE MARKET DEFINITION¹



HIGH STREET & CONVENIENCE MULT.



SYMBOLS AND INDEPENDENTS



PETROL AND TRAVEL



Source:
1. IRI Marketplace, Convenience, Representative retailers

CONVENIENCE & IMPULSE DATA

SEGMENT PERFORMANCE CONVENIENCE GB

	Value	Value Growth % YA	Value Growth Actual YA	Litres	Litres Growth % YA	Litres Growth Actual YA
Total Soft Drinks	£2,115,974,348	2.3	£47,279,030	1,343,138,622	1.5	19,414,122
Total Cola	£516,069,458	4.2	£21,011,538	367,176,534	2.0	7,295,580
Total Cold Hot Drinks	£9,842,648	-13.3	-£1,504,985	4,100,977	-14.7	-706,379
Total Fruit Carbs	£213,849,275	2.7	£5,621,946	150,181,079	2.7	3,921,711
Total Glucose	£149,046,553	-14.0	-£24,334,351	69,084,911	-15.0	-12,230,885
Total Juice Drinks	£171,174,880	-4.1	-£7,284,672	82,329,054	-4.0	-3,438,800
Total Lemonade	£28,833,826	1.8	£520,787	45,216,775	3.9	1,681,094
Total Non-fruit Carbs	£58,886,405	4.1	£2,335,735	51,179,471	4.7	2,286,451
Total Other Category	£2,043,672	-1.1	-£23,426	632,797	-5.6	-37,285
Total Plain Water	£223,504,170	2.2	£4,828,351	211,271,448	1.9	3,940,085
Total Pure Juice	£69,662,441	-3.7	-£2,646,852	35,044,861	-5.8	-2,157,054
Total Smoothies	£25,491,711	17.9	£3,871,697	5,596,799	12.0	599,300
Total Sports	£72,886,596	-5.8	-£4,479,491	45,365,524	-5.7	-2,733,432
Total Squash	£38,197,508	6.3	£2,255,552	28,593,712	4.4	1,213,442
Total Stimulants	£402,865,284	8.4	£31,048,951	154,289,195	7.8	11,172,058
Total Traditional Mixers	£16,752,171	16.5	£2,376,357	15,080,646	12.1	1,628,989
Total Water Plus	£116,867,749	13.3	£13,681,893	77,994,842	9.8	6,979,244

SOURCE: IRI Marketplace Total Convenience GB 52 weeks to the 24th Dec 2017

CONVENIENCE & IMPULSE DATA CONTINUED

SEGMENT PERFORMANCE HIGH STREET

	Value	Value Growth % YA	Value Growth Actual YA	Litres	Litres Growth % YA	Litres Growth Actual YA
Total Soft Drinks	£278,222,862	8.8	£22,583,426	175,944,366	9.3	15,029,556
Total Cola	£72,841,769	15.1	£9,575,903	54,465,917	15.6	7,332,738
Total Cold Hot Drinks	£1,334,742	-29.1	-£548,392	597,098	-34.4	-313,356
Total Fruit Carbs	£24,560,985	6.2	£1,427,458	17,542,998	8.4	1,353,921
Total Glucose	£20,153,461	-8.9	-£1,966,140	10,208,913	-11.9	-1,380,377
Total Juice Drinks	£25,473,218	-0.5	-£123,321	12,193,757	-1.1	-136,119
Total Lemonade	£3,044,043	-1.8	-£55,963	5,237,380	9.2	440,111
Total Non-fruit Carbs	£5,829,974	33.7	£1,469,223	4,236,745	38.6	1,180,707
Total Other Category	£501,878	59.6	£187,438	140,292	27.8	30,487
Total Plain Water	£25,174,204	2.4	£590,147	25,266,831	3.5	853,947
Total Pure Juice	£11,191,684	1.3	£148,686	5,030,469	3.3	162,893
Total Smoothies	£10,046,961	17.8	£1,518,621	2,594,697	6.9	167,086
Total Sports	£7,465,450	5.2	£365,925	3,727,922	2.2	79,661
Total Squash	£4,878,198	12.1	£525,955	3,588,368	9.6	314,666
Total Stimulants	£43,933,018	16.1	£6,096,803	16,803,236	20.2	2,823,951
Total Traditional Mixers	£1,506,167	40.3	£432,932	1,336,181	55.0	474,281
Total Water Plus	£20,287,106	16.9	£2,938,150	12,973,563	14.5	1,644,960

SOURCE: IRI Marketplace High Street GB 52 weeks to the 24th Dec 2017

CONVENIENCE & IMPULSE

DATA CONTINUED

SEGMENT PERFORMANCE ROADSIDE – PETROL MULTIPLES

	Value	Value Growth % YA	Value Growth Actual YA	Litres	Litres Growth % YA	Litres Growth Actual YA
Total Soft Drinks	£196,646,454	4.6	£8,639,334	83,681,759	5.7	4,535,883
Total Cola	£43,731,016	7.2	£2,950,059	21,068,053	7.0	1,377,392
Total Cold Hot Drinks	£967,445	-9.2	-£98,435	326,626	-9.1	-32,567
Total Fruit Carbs	£10,399,992	8.7	£833,811	4,545,603	10.5	433,286
Total Glucose	£15,572,578	-6.9	-£1,147,448	5,893,001	-3.0	-179,410
Total Juice Drinks	£15,629,648	5.2	£778,080	5,505,313	9.6	483,330
Total Lemonade	£1,271,223	7.1	£84,321	1,118,623	11.0	111,092
Total Non-fruit Carbs	£2,644,898	0.7	£17,647	1,230,943	-3.9	-49,632
Total Other Category	£160,966	18.7	£25,309	34,042	19.7	5,605
Total Plain Water	£31,136,069	2.0	£613,145	22,001,502	2.8	589,270
Total Pure Juice	£4,655,713	-2.4	-£113,099	1,319,440	1.0	13,181
Total Smoothies	£2,381,453	4.1	£94,360	399,222	4.6	17,395
Total Sports	£5,753,799	-7.6	-£475,629	2,133,680	-5.9	-134,421
Total Squash	£831,889	1.1	£9,233	392,647	7.2	26,346
Total Stimulants	£51,269,750	8.9	£4,171,770	12,155,537	11.2	1,227,700
Total Traditional Mixers	£331,112	31.2	£78,694	236,525	41.9	69,856
Total Water Plus	£9,908,902	9.0	£817,514	5,321,000	12.2	577,461

SOURCE: IRI Marketplace Roadside – Petrol Multiples GB 52 weeks to the 24th Dec 2017

**CONVENIENCE
& IMPULSE**
DATA CONTINUED

SEGMENT PERFORMANCE TRAVEL

	Value	Value Growth % YA	Value Growth Actual YA	Litres	Litres Growth % YA	Litres Growth Actual YA
Total Soft Drinks	£154,354,381	5.6	£8,233,021	61,433,766	3.4	2,033,392
Total Cola	£24,166,356	6.0	£1,358,426	8,686,469	2.0	168,074
Total Cold Hot Drinks	£1,808,399	-19.9	-£448,142	560,616	-21.5	-153,661
Total Fruit Carbs	£10,884,600	2.7	£290,615	3,616,396	0.1	5,173
Total Glucose	£5,916,461	-9.9	-£648,900	1,852,582	-13.9	-299,499
Total Juice Drinks	£11,277,509	-4.1	-£479,264	3,469,900	-5.3	-194,526
Total Lemonade	£549,784	13.1	£63,635	214,016	6.7	13,367
Total Non-fruit Carbs	£2,078,597	9.0	£172,169	710,861	6.2	41,525
Total Other Category	£265,491	-15.2	-£47,671	56,310	-24.6	-18,328
Total Plain Water	£48,499,755	3.4	£1,609,391	27,104,680	1.7	451,770
Total Pure Juice	£6,966,625	2.6	£177,741	1,600,998	-0.1	-1,184
Total Smoothies	£6,168,510	32.7	£1,520,001	1,093,898	25.3	220,619
Total Sports	£2,655,183	-1.2	-£32,824	825,681	-3.6	-31,213
Total Squash	£441,393	-9.4	-£45,728	109,124	-3.7	-4,172
Total Stimulants	£11,653,240	9.6	£1,023,763	2,378,414	9.5	206,153
Total Traditional Mixers	£3	NA	£3	1	NA	1
Total Water Plus	£21,022,474	21.5	£3,719,805	9,153,819	21.7	1,629,294

SOURCE: IRI Marketplace Travel GB 52 weeks to the 24th Dec 2017

CONVENIENCE & IMPULSE

DATA CONTINUED

SEGMENT PERFORMANCE SYMBOLS & INDEPENDENTS

	Value	Value Growth % YA	Value Growth Actual YA	Litres	Litres Growth % YA	Litres Growth Actual YA
Total Soft Drinks	£1,479,255,528	0.5	£7,925,582	1,016,593,135	-0.2	-1,945,782
Total Cola	£375,111,371	1.9	£6,987,851	282,848,035	-0.6	-1,651,269
Total Cold Hot Drinks	£5,609,897	-7.7	-£470,228	2,572,795	-8.1	-226,623
Total Fruit Carbs	£167,880,803	1.9	£3,063,937	124,425,789	1.7	2,123,134
Total Glucose	£106,898,955	-16.0	-£20,432,624	50,951,358	-16.8	-10,322,021
Total Juice Drinks	£118,003,122	-5.9	-£7,415,340	60,881,993	-5.5	-3,571,971
Total Lemonade	£23,930,278	1.8	£414,372	38,630,786	3.0	1,109,811
Total Non-fruit Carbs	£48,215,154	1.3	£622,027	44,953,007	2.5	1,091,248
Total Other Category	£1,115,337	-14.5	-£188,501	402,154	-12.0	-55,048
Total Plain Water	£113,891,806	1.8	£1,996,827	132,365,664	1.8	2,288,488
Total Pure Juice	£46,847,941	-5.5	-£2,736,299	27,093,754	-7.8	-2,288,677
Total Smoothies	£6,872,713	12.3	£751,607	1,506,572	14.9	195,608
Total Sports	£56,931,756	-7.1	-£4,321,011	38,648,238	-6.4	-2,641,506
Total Squash	£32,043,004	5.8	£1,766,109	24,502,777	3.7	877,170
Total Stimulants	£295,501,615	7.2	£19,871,748	122,847,677	6.0	6,936,760
Total Traditional Mixers	£14,914,889	14.3	£1,864,729	13,507,938	8.7	1,084,851
Total Water Plus	£65,486,889	10.4	£6,150,379	50,454,592	6.6	3,104,254

SOURCE: IRI Marketplace Symbols & Independents GB 52 weeks to the 24th Dec 2017

**C O N V E N I E N C E
& I M P U L S E**
DATA CONTINUED

MANUFACTURER PERFORMANCE (TOP 10) CONVENIENCE GB

	Value	Value Growth % YA	Value Growth Actual YA	Litres	Litres Growth % YA	Litres Growth Actual YA
Total CC Enterprises Ltd	£721,430,689	5.4	£36,874,306	428,817,610	5.3	21,525,809
Total LR Suntory Ltd	£255,403,575	-8.6	-£23,903,876	114,936,951	-9.5	-12,000,351
Total Britvic UK PLC	£247,621,096	3.8	£8,955,542	191,390,582	-1.6	-3,104,963
Total Red Bull Ltd	£170,900,828	7.3	£11,687,187	34,999,813	8.4	2,716,675
Total Danone Waters Ltd	£155,544,161	-5.5	-£8,970,909	132,607,841	-2.5	-3,360,331
Total A G Barr PLC	£137,092,115	11.4	£14,035,880	101,078,659	10.8	9,861,255
Total Own Label Ltd	£121,599,725	-6.2	-£8,052,655	137,532,701	-4.0	-5,688,927
Total Nestle Waters Ltd	£51,197,512	0.5	£235,210	34,432,087	-2.7	-963,458
Total Highland Spring Ltd	£30,029,364	58.0	£11,023,978	27,970,887	38.8	7,821,999
Total Tropicana Ltd	£28,041,539	-6.2	-£1,868,447	9,301,694	-8.4	-852,596

SOURCE: IRI Marketplace Total Convenience GB 52 weeks to the 24th Dec 2017

**C O N V E N I E N C E
& I M P U L S E**
DATA CONTINUED

BRAND PERFORMANCE (TOP 10) CONVENIENCE GB

	Value	Value Growth % YA	Value Growth Actual YA	Litres	Litres Growth % YA	Litres Growth Actual YA
Total Coca Cola	£224,326,742	2.4	£5,267,690	145,091,684	1.6	2,275,865
Total Red Bull	£170,900,826	7.3	£11,687,187	34,999,813	8.4	2,716,675
Total Lucozade Energy	£128,968,784	-14.8	-£22,331,762	57,968,886	-15.7	-10,833,062
Total Diet Coke	£111,007,932	-2.2	-£2,502,215	69,720,112	-2.5	-1,808,370
Total Monster Energy	£83,942,055	20.4	£14,203,532	34,550,189	22.9	6,445,663
Total Retailer Own Label	£81,788,609	-5.9	-£5,119,844	88,851,305	-2.5	-2,309,189
Total Pepsi Max	£80,026,701	15.8	£10,903,206	64,767,155	8.8	5,233,985
Total Fanta	£58,047,714	7.0	£3,798,824	36,380,237	12.4	4,005,362
Total Evian	£54,180,567	-9.7	-£5,851,709	42,368,948	-11.2	-5,353,530
Total Ribena	£48,897,502	-9.0	-£4,845,611	22,099,819	-8.9	-2,154,603

SOURCE: IRI Marketplace Total Convenience GB 52 weeks to the 24th Dec 2017