

26 OCTOBER 2019

GUIDE TO...

The Grocer

SOFT DRINKS

YOU DESERVE THE

fastest growing

SQUASH BRAND*



*SOURCE: NIELSEN, TOTAL COVERAGE, SQUASH BRANDS
OVER £5M, MAT 07.09.19.

VIMTO

ALL EYES ARE ON VIMTO

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Levi Roots
Starlush
Fryst
Icee

↓ Vimto was the one to watch in 2019 and certainly didn't disappoint. After growing consecutively YOY for the past decade, which then accelerated to a staggering rate of 50% for the past three years, the refreshingly different soft drinks brand has now hit a record high value of £90m¹.

Not only that, Vimto is one of the fastest growing soft drinks brand in the UK, continuing to outperform the market and growing at twice the speed of the overall category. Becky Unwin, senior brand manager, Vimto, says: "The Grocer identified us as the soft drinks brand to watch this year and we've proved them right! Kantar recognised us as the nation's tenth most chosen beverage brand this year. And we're not just talking soft drinks – people are picking Vimto over all other categories, including alcohol and hot beverages. We've also risen through the ranks to become the number two squash brand. As one of the original makers of cordial, this is something we're really proud of.

"But that's not the only thing to shout about... We're seeing sales success all over the UK, with 1 in 4 households across the country now choosing us. There's an amazing 700,000 new buyers of Vimto and we're attracting more young and affluent shoppers too. These new recruits mean Vimto is now consumed on 491 million occasions (+99m more YOY)².

"Our multi award-winning 'I See

“Vimto is one of the fastest growing soft drinks brand in the UK”

Vimto in You' campaign has had a large part to play in our success. We're now sixth in the UK for spontaneous brand awareness and achieved exactly what we set out to do – reposition the brand with a 16-19-year old audience.

"This year we've invested £3.5m to further roll out our distinctive 'anti-advertising' creative and we're behaving more like our target market. Teens are always on, so we're taking the same approach across the channels they engage with. And it's working."

NO COMPROMISE ON TASTE

"As a soft drinks brand we can't not mention last year's sugar tax," says Unwin. "100% of the Nichols-owned portfolio was exempt when the levy came into effect, in fact it had been for some time, but despite a reduced sugar content, our sales have only increased.

"Our portfolio is big on flavour, which is why we're leading the healthy hydration charge with Vimto No Added Sugar and Vim20 flavoured water. These might be better-for-you products, but they still taste great and they're flying off the shelves as a result. Sales of Vimto No Added Sugar are growing at +8%, with sales of our No Added Sugar variants contributing to half of all Vimto sales³!

"Whilst meeting demand for healthier options is incredibly important, driving excitement and delivering a delicious product experience is at the core of everything we do. Vimto Remix takes our unique taste and mixes it up with adventurous, on-trend flavour combinations. Since launching in 2016, it's now worth £9.7m in incremental sales and is growing +36% YOY⁴.

"We may have enjoyed huge success recently, but we're not resting on our laurels. Keep your eye on us in 2020 as there's big things to come. Without revealing too much, rest assured we'll continue to offer fantastic choice with our range of refreshingly different soft drinks!"



SOURCES

1. Nielsen, Total Coverage, MAT 7.09.19.
2. Kantar, MAT 27.1.19.
3. Nielsen, Total Coverage, MAT 07.09.19.
4. Nielsen, Total Coverage, MAT 07.09.19.

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ANALYSIS

MORE THAN JUST A DRINK

This sector is in strong growth as it continues to offer more than just hydration. **Johanna Thomson** investigates





The overall soft drinks category has been one of the stand-out performers over the last two years – growing both value and volume sales [Nielsen Strategic Planner Data to WE 16.06.19].

According to the latest IRI figures, carbonated soft drinks, diet and no-added sugar have grown by 7.5% to 1.6 billion litres. But regular drinks have declined by 6.7% to 1.34m billion litres.

Chilled and ambient juice drinks are seeing the biggest decline of 13% (55 million litres) while from concentrate is down 8% (13.8m litres) – possibly down to the long-term decline of the juice category and concern about its natural sugar content.

Water is down 5% in volume with the functional water sector showing growth – up 3%.

Energy overall is in growth – up 4% in the last 52 weeks – with different subcategories showing a mixed performance.

Sales in functional energy have slowed from 6% growth last year (previous MAT year ago) to 1% growth and sports drinks have slowed from 8% to 4% growth.

Health is a key factor to consider, for example regular functional energy drinks, which makes up 77% of category volume, were down 2% in the last year whilst diet/no-added-sugar skus were seen to grow 13%.

Over the last 12 weeks, the total energy category was down 2% which could be attributed to health concerns with energy drinks being in the spotlight as well as the impact of summer 2018 which has caused decline across a number of categories in soft drinks. [All sources: IRI 52 weeks to 8/9/19]

Refreso's commercial director, James Logan adds: "On the whole people are becoming more health conscious and purchases are often for the family keen for their kids not to drink too much sugar. Any decline in sales could also be affected by price in some cases as prices across regular canned soft drinks (CSDs) rose 8% per litre in the last year."

The company's brand portfolio covers all drinks sectors from mixers **6 >>>**

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» 5 and functional energy drinks to juices, CSDs and water, with brands like Old Jamaica and Mr Freeze dominating in their categories. A top priority for the company is making all its brands even tastier, healthier and more environmentally friendly.

TAXING TIMES

The recent soft drinks levy is proof that UK consumers do respond to price increases. Sales of diet drinks soared 13.8% to 1.7 billion litres in the wake of the sugar levy. By contrast, volumes of regular fizzy pop fell 8.8% to 823.6 million litres [Kantar 48 w/e 24 February 2019].

However, while undeniably successful, the shift towards lower sugar alternatives was already well underway before the levy was applied for many brands.

Coca-Cola European Partners (CCEP) GB's sugar reduction journey began long before the tax was announced. "We've been busy working with our team of experts to refine our recipes and provide more low and zero sugar choices for consumers," explains Simon Harrison, vice president, commercial development at (CCEP) GB.

"We now offer more than 80 drinks across 20 different brands in Great Britain, which includes great-tasting, low or no sugar alternatives to core variants like Coca-Cola zero sugar which is the fastest growing major cola brand in GB [MAT Value Nielsen Total Coverage, data till 52 weeks w/c 13.07.2019]. In fact, in 2018, 67% of our volume in GB came from our low or zero calorie soft drinks and this continues to grow [CCEP internal volume metrics end of 2018].

"Whilst we anticipate the growth of low and no sugar alternatives to continue, consumers consistently tell us that they still want choice. They love the Coca-Cola original taste and do not want it to change. As a result, Coca-Cola original taste remains the no.1 soft drink in GB [MAT RSV, Nielsen Total Coverage, data till 52 Weeks w/e 07.09.2019] and is the cola variant bought the most by shoppers in GB [Kantar HHP penetration 52 Week, 09.09.2019].

In 2018, 156 million more soft drinks were consumed for health reasons com-

pared to the previous year [KWP Usage: Total Soft Drinks 52 w/e December 2018 vs 2017], and low and no calorie drinks have driven growth within the market at more than twice the rate of regular drinks [EXT IRI, Convenience Total Soft Drinks Low/No Cal Value Growth % (52wks to 24.02.19)].

In 2016, Lucozade Ribena Suntory announced an industry-leading health and wellbeing initiative to help its consumers make healthier choices, in line with long-term consumer trends.

Matt Gouldsmith, channel director, wholesale, at Lucozade Ribena Suntory says: "As part of this, we removed 50% of the sugar from our drinks. Our brands offer consumers healthier options and a range of choice, with every drink having a zero or low-sugar variant and continual innovation and flavours launching every year. This allows our retail customers to tap into ongoing consumer interest in health and offer their shoppers the right range on shelf.

"In the months following the introduction of the soft drinks industry levy, shoppers' spending on zero and low-sugar drinks increased by 33% and 29% respectively, showing just how important this segment of the market is. This is mirrored at the other end with a decline in high-sugar drinks (with over 8g sugar per 100ml), which were down by 8% [Take Home Soft Drinks - Spend - Value - 20 w/e Aug 18 vs. 20 w/e Mar 2018. Based on Products with known sugar values only, excludes estimates] in the months following the sugar levy. These patterns illustrate the relevance of a low and no sugar soft drinks range."

Last year's sugar tax didn't just impact on sales it also inspired a change in shopper behaviour, with one in five people now checking sugar content on packaging. [Nielsen Hot Topic Survey Post Sugar Tax June 2018].

"As a result, consumers are shifting away from regular soft drinks and gravitating towards low sugar versions," Becky Unwin, senior brand manager, Vimto. "This is evident within the Vimto range - sales of our Vimto No Added Sugar is growing at an impressive 8%, contributing to half of all Vimto sales (50%)

“Last year's sugar tax didn't just impact on sales it also inspired a change in shopper behaviour”



[Nielsen, Total Coverage, MAT 07.09.19].”

Remedy also points out that there has been a sales volume decline (-8.8% volume YOY) in sugary versus diet soft-drinks (+13.8% volume YOY) following the sugar tax.

Remedy co-founder Emmet Condon says: “The meteoric growth of the kombucha market is reflective of a more savvy consumer seeking out truly healthy options, without hidden sugars or artificial nasties. Remedy Kombucha is vegan, live cultured, raw, unpasteurised, teeming with tea polyphenols and organic acids as well as no sugar, naturally. It’s certainly ticking a lot of boxes

when it comes to a fizzy that’s not only healthy but tasty as well.”

At Britvic, its long-term focus on health and the increasing strength of its low/no sugar portfolio meant that it entered the levy from a robust position. “Today, 99% of our GB owned portfolio is below/exempt from the levy and our health strategy sits at the heart of our business. Our leading approach to reformulation has seen us remove billions of calories from GB diets since 2013,” says Phil Sanders, GB commercial director.

“In 2018, we removed an additional 3.5bn calories through the reformulation of J2O, whilst maintaining great taste.”

JUICY IDEAS

Fruit juice and juice drinks is the only soft drinks category in decline, down 0.9% in value, is also significant given that juices are exempt from the levy.

To tackle this decline, new capabilities at Princes Juice Cardiff site will allow the brand to offer real NPD. Joanna Watling, soft drinks commercial director at Princes says: “Many brands have suffered volume and value losses over the last few years due to overall market decline, fixture space reductions and the need to counter negative perceptions by educating consumers about the benefits of drinking pure fruit juice. **B >>>**

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» 7 Although the ambient category is in decline, pure juices are performing better than juice drinks. Declines in juice drinks are stronger as consumers switch from juice drinks into 100% pure juice from concentrate [Kantar 52 w/e 8th Sept Kantar].

Smoothies and juices, especially short life and cold pressed options are perceived as healthier but can actually contain a staggering 53g of sugar per bottle. As a result smoothies have now dropped into 0.8% decline as category excitement wanes [IRI, Total Smoothies, Value Sales, 12w/e 14.09.19].

“No matter how many fresh ingredients are contained in these products that level of sugar is hard to ignore and consumers will make the move away from these options towards Vithit,” says Vithit’s UK sales director Ryan Hacker.

Vita Coco is excited about the future of fruit juices and thinks there is still lots of scope for growth given the right product. Tim Rees, Vita Coco managing director, says: “Vita Coco’s new pressed coconut product has almost single-handedly reignited the fortunes of the category these past few months, helping to deliver 17% volume growth for Vita Coco over the crucial summer period [IRI, Total Vita Coco, Volume Sales, 12 w/e 14.09.19], so with the right NPD and activation, there is still plenty of scope for growth in the juice set.”

Price also limits sales with 30% of shoppers claiming fruit juices are too expensive [Hot Cow Independent Consumer Research Report June 2017: What Consumers Think of Juice Drinks]. Purity Soft Drinks thinks this is an opportunity for convenient and affordable brands like Juiceburst, that’s enjoying YOY value growth of +29% [IRI Market-place 52 weeks to 11/0819. Value growth % of Total Juice Burst Fruit Juice SubCat].

Sarah Baldwin, CEO, Purity Soft Drinks, states: “Fruit juices have been demonised by the media due to their high natural sugar content. The resulting shopper confusion over sugar has produced a decline in juice consumption. Almost 50% of shoppers are aiming to limit their sugar intake [Nielsen healthy snacking hot topic 2017]. 40% of

juice rejecters claim they are turned off by the sugar content [Hot Cow Independent Consumer Research Report June 2017: What Consumers Think of Juice Drinks].

“Category growth will be driven by clean and clear label brands. 46% of shoppers claim they are worried about juice ingredients [Hot Cow Independent Consumer Research Report June 2017: What Consumers Think of Juice Drinks]. More media scrutiny and interest in health will need brands to be transparent about ingredients and claim.”

Simon Harrison, vice president, commercial development, at Coca-Cola European Partners GB says: “In 2018 we reduced the sugar content of Capri-Sun original by 50% without compromising on the great taste. The move represented the next step in Capri-Sun sugar reduction programme, which had already seen the launch of Capri-Sun No Added Sugar in 2015 and the launch of Fruity Water in 2016, meaning the whole portfolio is now soft drinks tax exempted.

“Our Oasis brand is actually bucking the trend and is in both volume and value growth. The brand is the second biggest juice drink in GB and is now worth over £70m in GB [MAT Value Nielsen Total Coverage, data till 52 weeks w/c 17.09.2019].”

BOTTLED WATER

Bottled water was once the hero of the sector but concerns over single use plastics has made a dent in its success. However, despite this pressure to improve the environmental footprint of bottled water, globally it makes up more than half of the overall soft drinks market [Nielsen, Total Coverage, MAT 7.09.19]. So it is unlikely the bottled water category will be disappearing any time soon, therefore it’s crucial for brands to take responsibility and work towards making their packaging as sustainable as possible.

Radnor Hills is tackling the problem head-on by offering its range in cans. Its pure spring water is sourced from its family farm in Powys, mid-Wales, where it takes just seven minutes to filter from the ground into a can.

William Watkins, MD Radnor Hills,



“Despite environmental concerns, bottled water makes up more than half of overall soft drinks market globally”



says: “We recognised the benefits of the aluminium can – with its 100% recyclability and long shelf life and wanted to introduce it into our range of products. Whilst all the products we produce are fully recyclable, aluminium cans have the highest recycling rate of them all.”

According to research nearly seven out of ten Gen Z consumers are now using reusable bottles highlighting the sheer scale of the challenge. Tim Rees, Vita Coco managing director, adds: “Clearly, heightened concern over single use plastics presents a significant challenge for

bottled water. That said, clearly this isn’t a category that is going to disappear altogether, rather it will evolve and adapt, as we’re already seeing with the influx of innovative recyclable or reusable packaging solutions like the Ever & Ever brand in the US, and recent moves by the big players in Dasani and One Water to aluminium packaging.”

However, Lucozade Ribena Suntory point out that it’s vitally important that industry doesn’t lurch to solutions that have unintended consequences. Matt Gouldsmith, channel director, says: “We

believe plastic primary packaging for soft drinks – which has a lower carbon footprint than glass and cans – is the best solution that’s currently and commercially available. Recycled plastic has an even lower carbon footprint than virgin plastic. With the right recycling infrastructure and an effective circular economy, a plastic bottle does not need to be single use.”

Ribena Frusion, the brand’s new water plus offering under the Ribena brand, is already manufactured in 100% recycled plastic (rPET) 420ml bottles, ensuring no new plastic needs to be produced. This move is one step towards Lucozade Ribena Suntory’s ambitious plan to move to 100% sustainable plastic bottles within a decade, using fully recycled or plant-based materials across its entire portfolio by 2030.

Get More Vits believes that manufacturers should take a pragmatic approach and ensure they are taking the fundamental steps to reassure consumers that plastic is fully recyclable and, where possible, incorporating recycled PET into their production. Chris Arrigoni and Steve Norris Get More Vits say: “The latter of these is currently expensive due to its availability, but as demand increases so should supply, and prices will hopefully become more accessible.

“However, it will require broader action to ensure the survival and continued positive performance of plastic bottled water, namely facilities for convenient and efficient recycling of plastic, mirroring the deposit schemes of Scandinavia and Germany.

“This requires government intervention and support and is not an easy fix. If implemented successfully however, there is no reason why the recyclable qualities of what is essentially a convenient and lightweight packaging format cannot be utilised to good effect.”

Sustainability and recycling are high on the consumer agenda, with 42% looking to manufacturers to take the lead and make their packaging easy to recycle [Kantar World Panel Link Q survey answered by 5,084 Worldpanel Plus panellists. Feb 2018].

Simon Harrison, vice president, **10 >>>**

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» 9 commercial development, at Coca-Cola European Partners GB says: "This year we made great strides towards our 2020 sustainability goals and announced that Glacéau Smartwater bottles will be made from 100% recycled plastic (rPET) by the end of the year. We've committed to moving the entire range and both its 600ml and 850ml servings into plastic bottles made from 100% recycled PET plastic. The changes will remove 3,100 tonnes of virgin plastic from circulation each year."

In the past year, SodaStream has also launched a number of new innovative products to meet consumers' demands in an ever increasing environmental and health conscious world. Such innovations include the launch of Soda Press, a range of healthier, certified organic, vegan-friendly, gluten-free and low sugar syrups to add distinctive flavours to sparkling water.

All of the cans, bottles and cartons produced at Nichols Plc are 100% recyclable and the company has used recycled materials for several years. "For example," adds Becky Unwin, senior brand manager, Vimto, "Our Vimto squash bottles already contain 51% recycled material (rPET). We're also evaluating as a business where we can reduce the amount of plastic we use overall."

AquaVia agrees that the bottled water category has certainly suffered a consumer backlash since Blue Planet 2 highlighted the global environmental impact of plastic. However it points out that nearly all plastic bottles are fully recyclable but in practice a very small proportion are being recycled.

Terry Hearty, AquaVia account director says: "Manufacturers are already moving to more eco-friendly packaging, but the speed of response from the international market leaders has been disappointing. Blue space is definitely there for newer market entrants and disrupters to appeal to millennials with non-plastic pack alternatives."

With an ever-increasing focus on a healthy, active lifestyle, the beverages marketplace is redefined by discerning consumers: quality, traceability and trust are key tools that people use

when adopting a brand nowadays. Aqua Carpatica's mission is to deliver on all these demands.

Jean Valvis, president & CEO, says: "Our award-winning range stands out thanks to its exceptional qualities. Ethically sourced from protected springs in the Carpathian Mountains, home to over 60% of Europe's mineral water resources, it offers the perfect hydration solution: extremely low in sodium, almost nitrate free natural mineral water, with a low mineral content and naturally alkaline."

FUNCTIONAL DRINKS

Nielsen data, which includes on-the-go purchases, puts the total energy drinks market value at £1.2bn.

Kantar data shows take-home sales of energy drinks rose £11.8m in the past year to a total £239.5m. Not bad for a market that was forecast to be in major trouble this year, following widespread sales bans to under-16s.

And there is plenty of scope for further growth. Lucozade Energy and Lucozade Sport continue to drive sales success, together adding a total of £35.6m to the market over the past year. Lucozade Energy, with growth of 10.7%, and Lucozade Sport, with growth of 6.9%, are both ahead of the soft drinks market [EXT IRI, MarketPlace, GB, latest 52 week data ending 25.08.19].

More broadly, the energy segment is currently growing by 7.6%, while sports drinks are also showing strong growth of 8.3%, illustrating just how fundamental this segment is to a retailer's soft drinks chiller [EXT IRI, MarketPlace, GB, latest 52 week data ending 25.08.19].

Matt Gouldsmith, channel director, wholesale at Lucozade Ribena Suntory says: "Excitement is being driven in the sports and energy segment through new flavours. The Lucozade Energy flavours range has contributed a significant £72m worth of sales, showing just how important it is to carry a diverse selection. Lucozade Sport Fruit Punch, which was introduced six months ago has already driven £4m worth of sales."

Adrian Troy, marketing director at AG Barr agrees this is an exciting and fast-



“The energy sector is an exciting and fast growing part of the soft drinks market delivering the highest profit per litre”



growing part of the soft drinks market delivering the highest profit per litre for retailers, with over one in three soft drinks sold in convenience stores being an energy drink [IRI Marketplace, PPL & Average Margins, MAT to 27.01.19, GB Convenience]. He adds: “Consumers are increasingly opting for flavoured variants when choosing an energy drink, with flavoured energy now accounting for 34% of the mainstream energy market and growing faster than original energy [IRI Marketplace, Value Sales, Mainstream Drink Now Energy excl. Original, MAT 14.07.19, Total Coverage].”

Despite all this good news, the sports drinks category has been in steady decline for a number of years and, if you add the impact of the sugar tax to a sub-category laden with sugary beverages, there is no surprise that the sales have diminished in size overall – even if energy’s performance in isolation is generally holding up well. Chris Arrigoni and Steve Norris from Get More Vits say: “It would appear that this trend will continue in the short term, although shoots of growth may be perceptible as healthy choice broadens within the category.

“More natural energy drinks are com-

ing on to the market, while protein and BCAA drinks are giving the sports category a healthier aspect. These provide active consumers with functional ingredients above and beyond the simple slug of glucose that more traditional sports drinks generally provide.”

The affiliation with professional sport continues to support the sport and functional drink sub-category. “However, it is an uncertain time for the wider energy drinks category,” adds Remedy co-founder Emmet Condon. “Some brands have responded with reformulations, and others have stood by their original high sugar content recipes. Consumers continue to search for a more natural ingredient list.

“Remedy Australia’s research revealed a tension between people wanting to make healthy choices but also needing an energy boost. This led to the launch of our all-natural, no nasties, no sugar energy drink, believed to be the world’s first kombucha-based energy drink in May 2019 across Australia and New Zealand. Remedy makes up a regular part of many Australian professional athletes’ daily regimes, often recommended by dieticians strict on sugar-intake and looking to fuel clients with natural foods and drinks.”

Within sports and energy drinks, the entirety of decline actually stems from sports drinks while energy drinks remain in 4.2% growth [IRI, Energy Drinks, Value Sales, 52 w/e 14.09.19].

Tim Rees, Vita Coco managing director, says: “The continued growth of energy drinks is largely driven by low or zero sugar variants as consumers actively seek out healthier options. Another key growth engine for the sector is the natural energy subset which while still comparatively small, is growing at 16.5% year on year – evidence that consumers are increasingly looking for natural ingredients that they can trust, but crucially which deliver no less efficacy than their artificial counterparts.”

That’s why All Market Europe have recently launched Runa – a natural, low sugar energy drink that comes from a leaf not a lab. The primary source of its caffeine comes from the Ecuadorian **12 >>>**

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»» **ii** super leaf, Guayusa, which is rich in l-theanine and is the only B-Corp certified energy brand in the UK.

Vit Hit expect sports and energy not to progress well as consumers start to realise that the average sports drink can contain over 28 grams of sugar which is more than your daily allowance.

Rachael Gillmor Murphy, Vit Hit's international brand and marketing manager says: "The UK consumer is more educated on the concept of healthy energy boosts and understands there are other methods of achieving this without excessive sugar intake".

Get More Vits launched Get More Vits Recovery earlier this year, providing consumers with a dose of electrolytes to replenish nutrients lost during exercise; while Get More Vits L-Carnitine & Chromium helps maintain a healthy metabolism.

Chris Arrigoni and Steve Norris from Get More Vits say: "Additionally, we have just launched our new Get More Vits Active BCAA in a 330ml can which helps to support the body before and after exercise, as well as combatting fatigue. As with the whole Get More Vits range, these drinks are all sugar free and virtually zero calorie."

Offering advice to improving the energy drinks category both in depot and in store, Red Bull has devised these three top tips:

- **Space:**
 - Red Bull advises retailers to stock the most effective range to drive the greatest value
 - Category space should be aligned with share of value sales to maximise sales
- **Focus on top five brands:**
 - 50-60% of Soft Drinks space should be allocated to the top five brands
 - Ensure space for Sports & Energy brands, in line with value share of the category
- **Vertical blocking:**
 - Shoppers only see products within a 1.3m breadth
 - Vertical blocking helps shoppers to easily find the product they are looking for improving their ease of shop

RTD COFFEE

While the hot beverages market is stagnating - up 0.1% to £2.2bn [Kantar 52 w/e 19 May 2019] - their chilled counterparts are posting double-digit growth. In 2018, coffee shop sales of iced beverages rose 14.3% to £395m, according to coffee research specialist Allegra. It estimates the iced market will reach £449m in coffee shops by the end of this year. And where out-of-home tastes go, retail sales tend to follow.

Adam Hacking, head of beverages, Arla Foods says: "The RTD coffee sub-category has shown consistent growth over the past three years (38.3%YOY) and shows no sign of slowing. With household penetration comparatively low, iced coffee is predicted to grow faster than any other sub-category within soft drinks over the

“ The RTD coffee sub-category has shown consistent growth over the past three years and shows no sign of slowing ”

next few years. For retailers looking to stock RTD or review current SKUs, Starbucks is a must have. Starbucks is now not only the biggest iced coffee brand, but also the biggest dairy drinks brand in the UK. Almost 50% of iced coffee sales are now via the Starbucks brand, with four of the five top selling SKUs part of the Starbucks portfolio [Nielsen 52 w/e 21st April 2019]."

Crediton Dairy is also reaping the rewards of a busy summer for its Arctic Iced Coffee - the UK's fastest growing ready to drink iced coffee range with LFL sales growth +40% YOY [IRI Total Market Unit Sales 52 w/e 8 September 2019].

It included a significant step into functional iced coffee with the launch of the Arctic Blast range and an extensive summer experiential campaign that reached





over 400 thousand consumers.

Kelly, head of marketing & Insight at Arctic Coffee comments: “Driving incremental category growth by bringing younger shoppers to the category, there’s no denying Arctic’s value price point combined with great taste makes it an attractive purchase when it comes to making a soft drinks choice. Arctic is clearly meeting the needs of the younger generation. The demand for RTD iced coffee isn’t abating. Indeed with category sales up +26% YOY Iced Coffee [IRI Total Market Unit Sales 52 w/e 8 September 2019] it is an appealing choice in the soft drinks fixture.”

DRINKS WITH BENEFITS

Shoppers are increasingly buying products that offer extra functional benefits [Mintel Global Food & Drink Trends 2019 Report]. Drinks fortified with vitamins or protein for example provide a convenient way to get supplements.

Healthy Plus is forecast to rise 23% over the next four years [Fortified/functional beverages in the UK - Euromonitor International March 2019]. This sector is outperforming the category by 50% [IRI Marketplace 52 weeks to 24/03/19. Value growth % of functional and fortified juice drinks and total juice drink category].

Now in its 7th year of trading, Get More Vits is enjoying another stellar year, with sales up just shy of 60% [Nielsen ScanTrack to w/e 13 July].

Ribena has also moved into the growing water plus category with the introduction of Ribena Frusion at the start of 2019. Matt Gouldsmith, channel director, wholesale at Lucozade Ribena Suntory, says: “Harnessing Ribena’s trusted expertise and passion in blackcurrants, Ribena Frusion is unique in the soft drink category, using blackcurrant water naturally infused with real fruits and botanicals. Low in calories, rich in Vitamin C and with no sweeteners or preservatives, Ribena Frusion aims to tap into the consumer focus on enjoyable wellness.”

Vithit has also become a hit. It’s a low-calorie vitamin drink infused with juice, tea and water and was created as a low sugar alternative over 15 years ago. Rachael Gillmor Murphy, Vithit’s

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»» **B** international brand and marketing manager says: "Vithit contains less than six grams of sugar from juice which gives us an advantage in this expanding wellness sector."

Purity Soft Drinks also expect growth in this category to continue and anticipates that growth will be driven by energy products with natural ingredients. Purdey's and Tenzing triple digit YOY growth supports this view [IRI Marketplace 52 weeks to 11/0819. Value growth % of Total Purdey's Rejuvenate, and Total Tenzing].

Sarah Baldwin, CEO, Purity Soft Drinks adds: "Purity Soft Drinks Juiceburst Vitamin Water, is perfectly timed to take advantage of this shift."

Upbeat Drinks make a range of Juice plus and fruit carbonate drinks with added protein and targeted ingredients designed to help consumers feel, think and drink positive. "Upbeat have fruity, protein enriched, zero sugar drinks to fulfil a range of functional consumer need states: strength, energy and mental performance," says founder Mark Neville.

A MATTER OF TASTE

Taste remains at the heart of consumers' decision-making process when choosing which food or drink to buy. The recent boom in craft soft drinks has also created a new discerning premium soft drinks consumer.

This consumer is seeking differentiated flavour experiences and premium quality options above and beyond ordinary carbonated soft drinks.

Andrew Jackson, marketing director, says: "Flavour is at the heart of the Fentimans brand, and we have a team of in-house flavour experts who are continuously keeping an eye on latest trends and developing new and interesting flavour profiles."

"In addition, we know that a growing number of our audience are increasingly looking for great tasting light drinks with fewer calories. At Fentimans, great flavour and quality is paramount, so we have worked to deliver a new range of 'light' drinks which do not compromise the authentic Fentimans flavour. The Fentimans 'light' range launched earlier



“Taste remains at the heart of consumers' decision-making process when choosing food or drink”

this summer in a new 250ml bottle.”

Both of Belvoir's Natural Cordials contain 50% more juice, (but no artificial sweeteners, preservatives, colourings or flavourings) and 50% more servings than the current leading branded squash.

Available in recyclable glass, 750ml bottles and with a dilution ratio of 1:8, each cordial produces a refreshing 27 (250ml) servings. This makes them not just the best value cordials but they can also claim the highest juice content too.

Pev Manners, MD for Belvoir Fruit Farms explains their appeal: "We're known for our super premium Cordial and Pressé ranges, made with quality natural ingredients. Both are designed for an adult audience with a more sophisticated palate. Our Natural Blackcurrant and Orange Cordials will appeal to fami-

lies seeking great tasting, value-for-money everyday refreshment, but which are 100% natural and free of any nasties."

SodaStream is also tapping into the demand for new and interesting flavours. Tiago Alves, UK general manager says: "We want to encourage consumers to have fun with water and by customising their drinks from traditional favourites such as Old Fashioned Lemonade to the excitement of Raspberry & Mint, they're able to do that with our new Soda Press range. Also, the launch of My Only Bottle is our latest initiative to help customer reduce plastic waste. This is the brand's first UV-resistant, dishwasher-friendly reusable bottle."

Chris Arrigoni and Steve Norris believe Get More Vits' says: "An ever more demanding consumer expects to be able to buy drinks that deliver on taste and health nowadays – a far cry from the adage of yesteryear that if it tastes bad it must be doing you good."

"Get More Vits seek to meet this need by offering specific health benefits in drinks blended with a broadly appealing range of recognisable and accessible flavours."

With this kind of innovation the soft drinks category will always enjoy buoyant sales whatever the levy!

PURITY SOFT DRINKS

PURELY THE WAY FORWARD

DETAILS

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KEY BRANDS

Juiceburst
Juiceburst
Vitamin Water
Firefly

↓ Purity is proud to say it doesn't put anything unnecessary into Juiceburst or Firefly. Everything is derived from natural ingredients.

Sarah Baldwin, CEO, Purity Soft Drinks, states: "Juiceburst continues to be the fastest growing juice brand, having enjoyed 23% growth in the past three months¹.

"Quite a feat considering the market had such a strong summer last year. It also outperformed competitors in extensive consumer taste tests.

"We also know that one of the biggest consumer drivers is flavour innovation. Juiceburst Pink Lemonade is currently seeing 136% growth YOY² while our Strawberry and Apple 330ml was in such demand that we quickly added it to the core 500ml range.

"We are also pleased to announce Watermelon and Raspberry joins the 330ml range this Autumn.

"Having a drinks range that's schools approved is a huge endorsement for Juiceburst; our range contains no added sugar, just natural plant extract Stevia.

"We are also currently using 25% RPET with an aim to move to 30%, and in the past year have sent out over 350 recycling bins to schools.

"Following its success in 2018, our #nononsenseskills marketing campaign fronted by roller skater Alice Lean will be back in early 2020, with a particular emphasis on social engagement."

“Consumers are demanding more from their food and drink than ever before”



NEW LAUNCH

As well as Juiceburst, we are excited to announce exclusively to The Grocer, the launch of Juiceburst Vitamin Water. Fortified with 100% RDA of 6 B-vitamins and added amino acids, it will contain only naturally occurring sugar from fruit, no artificial sweeteners and will be under 50 calories per bottle."

Baldwin continues, "41% of shoppers claim they are looking for healthier options³ and people are taking an active interest in products that have qualities that can improve health and wellbeing⁴. Juiceburst Vitamin Water, delivers for shoppers who want health, taste and value without compromising on refreshment.

Alongside our Juiceburst range, Purity's adult soft drink brand Firefly – a revitalising soft drink blended with botanicals, with no artificial ingredients – continues to grow +57% YOY⁵. Flavours including Kiwi, Lime & Mint and Peach & Green Tea lend themselves well to sit down and savour moments and with one in three adults reducing their alcohol consumption and one in five adults now completely tee-total, Firefly is the perfect, delicious, booze-free alternative."

SOURCES

1. IRI market data, drink now value growth.
2. IRI market data.
3. Nielsen Healthy Snacking Hot Topic Report 2017.
4. Mintel Global Food and Drink Trends Report 2019.
5. IRI market data.



AG BARR

ENERGISING SOFT DRINKS

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Rubicon
Rockstar
Strathmore
Ka
Snapple
San Benedetto
Bundaberg

SOURCES

1. IRI Marketplace, Value Sales, Single Flavour OFCs, MAT to 14.07.19, GB Convenience.
2. IRI Marketplace, Units/store/week – mainstream brands only, w/e 14.07.19, Scotland Convenience
3. AG Barr Research, Aug 19.
4. IRI Marketplace, PPL & Average Margins, MAT to 27.01.19, GB Convenience
5. IRI Marketplace, Value Sales, Mainstream Drink Now Energy excl. Original, MAT 14.07.19, Total Coverage.
6. IRI Marketplace, Value Sales, MAT 14.07.19, Total Coverage.

↙ Irn-Bru is proud to announce the nationwide rollout of Irn-Bru Energy; a great-tasting new energy drink, after a highly successful launch in Scotland earlier this year.

The new drink combines the iconic flavour of Irn-Bru's top secret essence with the taurine, caffeine, B vitamins and taste of an energy drink, offering a different taste experience to regular Irn-Bru. It will be available in 330ml x 12 slim cans in sugar and no sugar options.

The new variant of the UK's No. 1 flavoured carbonate brand¹ has outperformed its closest competitors since launching in Scotland in July, establishing itself as the year's fastest selling soft drink in convenience² with 70% who tried the product purchasing it more than once and 80% saying they intend to buy it again³.

"Energy is an exciting and fast-growing part of the soft drinks market delivering the highest profit per litre for retailers, with over one in three soft drinks sold in convenience stores being an energy drink⁴," says Adrian Troy, marketing director at AG Barr.



“UK shoppers love the iconic taste of Irn-Bru”

"Consumers are increasingly opting for flavoured variants when choosing an energy drink, with flavoured energy now accounting for 34% of the mainstream energy market and growing faster than original energy⁵.

"We also know that UK shoppers love the iconic taste of Irn-Bru, which is currently growing at 9% across England⁶, so we are confident that demand for new Irn-Bru Energy will be high."

Retailers are advised to stock both variants of new Irn-Bru Energy and merchandise them in the 'On the Go' section of their chiller next to other slim can energy products, to offer shoppers choice and drive incremental sales within this important and profitable part of the soft drinks category.

The Irn-Bru brand has grown in size and popularity since its launch in 1901. The iconic fizzy soft drink is loved for its unique, indescribable taste made up of 32 different flavours and this, combined with sustained and significant investment, means that Irn-Bru is an iconic brand nationally, achieving UK No.1 status in flavoured carbonates¹.

Irn-Bru Xtra in 2016, delivering extra Irn-Bru taste with zero sugar, was the first permanent addition to the Irn-Bru range in 35 years, responding to changing shopper attitudes on health and lifestyle. The Irn-Bru Xtra variant has delivered £19m of retailer sales this year and is currently growing at +25%⁶.

Famous for its fun, creative and cheeky advertising campaigns, Irn-Bru has developed a loyal customer base over the years throughout the whole of the UK. The regular and XTRA variants are already must-stock for all retailers.



**FROM THE UK'S NO.1
FLAVOURED CARBONATE BRAND***



NEW

IRN-BRU ENERGY

**NOW AVAILABLE
NATIONWIDE**

ALL MARKET EUROPE

HITS THE SWEET SPOT GUILT-FREE



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KEY BRANDS

Vita Coco Coconut
Water
Vita Coco Pressed
Coconut Water
Vita Coco Sparkling
Vita Coco Dairy Free
Vita Coco Coconut Oil
Runa

There are a huge number of brands trying to tap into the burgeoning demand for healthier soft drinks, but the vast majority of the options are either lacking in flavour or are reliant on artificial sweeteners to deliver taste. Available in Lemon & Lime or Pineapple & Passion-fruit variants, Vita Coco Sparkling hits a much needed 'sweet' spot by delivering on all fronts – an all-natural product with great taste, only 20 calories and 3.7g of sugar per 330ml can, available in Sainsburys, Tesco, Co-op and Health Stores.

More so than ever before people are studying nutritional panels and actively seeking out healthier, lower sugar, more natural options. Crucially however, consumers remain completely unwilling to compromise on taste – the brands win-

“Vita Coco Sparkling hits a much needed ‘sweet’ spot by delivering on all fronts”

ning with the consumers of today are those that manage to deliver exciting, naturally derived products that not only taste great, but are genuinely healthy.

Tim Rees, managing director, says: “Building on the success of our Bubbles with Benefits launch campaign, we have a really disruptive marketing plan for 2020 focusing on the great taste (as that is what consumers tell us is the most rewarding aspect of our new Sparkling range). This will be in addition to an exciting marketing calendar to support both our current products in market and our NPD launches. Across all products we will be planning further outdoor disruptive media, experiential events and bigger instore displays than ever before to continue drive category sales forward.”



PACKED WITH FLAVOUR. NOT SUGAR.

NEW

ONLY 20 CALORIES*



ONLY 20 CALORIES*



ONLY 20 CALORIES*

AQUAVIA

BEST UK HYDRATION

DETAILS


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Account Director

KEY BRANDS

AquaVia

 Bottled directly at the source deep in the Carpathian Mountains, this unique alkaline spring water with a natural pH of 9.4.

AquaVia is proud of the fact that it has, for the second year in a row, been awarded Superior Taste with three Golden stars by the International Taste Institute (ITI), underlining its superior attributes recognised by its strong global presence.

“Velvety and smooth. Creamy on the palate. Its strong point is its delicate flavour and softness. ITI Jury, May 2019.

Terry Hearty, account director says: “Attractive and informative packaging ensures the consumer perfect guidance for the best hydration choice in the market.

“In addition to its exceptional purity, it’s rich in antioxidants and has stable pH throughout its lifetime.

“Velvety and smooth. Creamy on the palate. Its strong point is its delicate flavour and softness”
ITI Jury, May 2019

“AquaVia guarantees the consumer great value for money and is aiming to become the natural choice when pursuing healthy lifestyle and perfect hydration.

“Environmental initiatives to neutralize carbon footprints are already in place and continuous efforts to support local communities through culture, sports and social events will contribute to place AquaVia at the top of the consumer’s mind.”

The bottle sizes range from 330ml up to 5 litres ensures a great choice for the consumer and alternative packaging such as glass and Pure-Pak will soon reach the UK market.

Founded in 2018, AquaVia serves the consumers’ need for optimal hydration, taste and well-being.

Hearty adds: “We call it Raw Power Pure Nature.”

NATURAL pHOWERS

Naturally alkaline spring water bottled at the source

pH 9.4



RAW POWER PURE NATURE

STARBUCKS READY TO DRINK COFFEE

THE RTD COFFEE LEADER

DETAILS

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KEY BRANDS

Starbucks

The chilled RTD coffee category is exploding, rivalling previously popular formats including flavoured milks, RTD coffee is now the go to dairy drink of choice for consumers.

Adam Hacking, head of beverages, Arla Foods says: "The RTD coffee sub-category has shown consistent growth over the past three years (38.3%YOY¹) and shows no sign of slowing. With household penetration comparatively low, iced coffee is predicted to grow faster than any other sub-category within soft drinks over the next few years. For retailers looking to stock RTD or review current SKUs, Starbucks is a must have. Starbucks is now not only the biggest iced coffee brand¹, but also the biggest dairy drinks brand in the UK¹. Almost 50% of iced coffee sales are now via the Starbucks brand¹, with four of the five top selling SKUs part of the Starbucks portfolio².



“Starbucks is not only the biggest iced coffee brand but also the biggest dairy drinks brand in the UK”

SOURCES

1. Nielsen 52 w/e

21st April 2019.

2. AC Nielsen 52 w/e

1st August 2019.

Starbucks best-selling SKU's continue to dominate the market with the top three SKUs selling 31.8% of the total RTD coffee market value sales². Starbucks Chilled Classics Caffé Latte is the number one bestseller, accounting for nearly a fifth of the overall market share at 17.3%, followed by the Starbucks Doubleshot Espresso at 13%, with the third and fifth spots taken by Starbucks Frappuccino Mocha and Starbucks Chilled Classics Caramel Macchiato respectively¹.

Starbucks has enhanced its chilled classic range with the launch of the first ever dairy free drink in the Starbucks chilled classics range – Almond Plant-Based Iced Coffee. Suitable for vegans, the latest addition which combines Starbucks' signature Espresso Roast coffee with a premium almond plant-based drink will be joined by two new dairy free SKUs in 2020 – watch this space!

STARBUCKS® — THE UK'S NO.1 — CHILLED COFFEE BRAND[†]



THE SAME BEAN  USED IN OUR COFFEE HOUSES
IS USED IN OUR CHILLED COFFEE RANGE

BELVOIR

100% NATURAL INGREDIENTS

DETAILS

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KEY BRANDS

14 delicious &
dilutable Cordials
13 ready-to-drink,
gently sparkling Pressés

Today's soft drinks sector is way more competitive than in 1984 when Belvoir Fruit Farms launched the first Elderflower Cordial onto the UK market. Back then they opted to use only honest, natural ingredients with no artificial flavourings, colourings preservatives or sweeteners. Thirty five years – plus 14 Cordials and 13 lightly sparkling Pressés later – Belvoir retains the same ethos of honesty, quality and enjoyment, still no nasties and a determination to keep innovating to remain relevant to modern drinkers and their needs.

Now Belvoir has used all their fruity 'know-how' to create two refreshing natural cordials that satisfy the need for a premium family product to bridge the quality gap between mainstream dilutes and super premium cordials like their own. Natural Blackcurrant Cordial and Natural Orange Cordial use 100% natural

“Designed for an adult audience with a more sophisticated palate”

ingredients with all the quality appeal of Belvoir's classic Cordial range, but offer even better value for money, making them a perfect everyday treat for the whole family.

JUICY PROPOSITION

Both of Belvoir's Natural Cordials contain 50% more juice, (but no artificial sweeteners, preservatives, colourings or flavourings) and 50% more servings than the current leading branded squash. Available in recyclable glass, 750ml bottles and with a dilution ratio of 1:8, each cordial produces a refreshing 27 (250ml) servings. This makes them not just the best value cordials but they can also claim the highest juice content too!

Pev Manners, MD for Belvoir Fruit Farms explains their appeal: “We're known for our super premium Cordial and Pressé ranges, made with quality natural ingredients. Both are designed for an adult audience with a more sophisticated palate.

“Our Natural Blackcurrant and Orange Cordials will appeal to families seeking great tasting, value-for-money everyday refreshment, but which are 100% natural and free of any nasties.”

Marketing plans for the Natural Cordials will continue to major on the 100% natural claim; a core differentiator which gives Belvoir a clear edge over other family-friendly dilutes on the market within that price range.

● Natural Blackcurrant Cordial – made with over 50% real fruit juice from luscious dark purple blackcurrants and a dash of lemon juice resulting in a full, delicious summery taste with a clean refreshing finish.

● Natural Orange Cordial – again made with over 50% real fruit juice this subtle combination of sweet & tangy orange juices with a touch of lemon juice, creates a refreshing cordial with the natural sweetness of perfectly ripe oranges and a zesty finish.



New & Natural...

...family
friendly
cordials

from

*Belvoir
fruit farms*

MADE FOR
Good times

100% Natural
ingredients, with
over 50% real
fruit juice

~

Traditional family
flavours

~

50% more servings
than leading
competitors*

*Based on 250ml servings of leading
orange & blackcurrant squash brands
750ml bottles packed in cases of 6



Choose Belvoir to grow your sales, naturally

Belvoir fruit farms

@belvoirff

@belvoirfruitfarms

www.belvoirfruitfarms.co.uk

BRITVIC

AN EXCEPTIONAL YEAR FOR BRITVIC

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Commercial Director

KEY BRANDS

Robinsons
Fruit Shoot
Robinsons Refresh'd
J2O
Pepsi Max
Tango

↓ Britvic is leading the charge in the soft drinks category by providing consumers with a choice of drinks within its portfolio of market leading brands.

The company remains committed to offering not only healthier choices, but those that do not compromise on taste. Britvic continues to drive innovation in this area and currently 99% of its owned portfolio is below or exempt from the Soft Drinks Industry Levy (SDIL).

Phil Sanders, GB commercial director, At Home at Britvic, comments: "It's been an outstanding year for Britvic with all of our brands performing exceptionally well, despite what could have been a challenging time for the soft drinks category. Robinsons is the no.1 GB squash brand, so it's no surprise that it can be found in 47% of UK households.

"We have launched a number of products from the brand into the grocery channel over the last year including Robinsons Fruit Creations, the

“It's been an outstanding year for Britvic with all of our brands performing exceptionally well”

biggest soft drink launch of 2018 to continue its leading position as a family favourite. Fruit Creations has twice the fruit content versus the core range and is now worth over £22m in retail sales value, winning Product of the Year 2019 in the UK's biggest Consumer Survey of Product Innovation for the soft drinks category.”

The launch of Fruit Creations contributed to propelling the squash category back into growth after long-term value decline, a decline which was driven by the consumer switch to water.

The Britvic team set out on the huge task of transforming the category by tiering its offering into good (core range), better (Fruit Creations) and best (Fruit Cordials) in the UK, which has been a phenomenal success as they appeal to a diverse range of audiences.

Within 12 months of launching the award-winning project, Britvic has catapulted Robinsons into +7.8% value sales growth which in turn is helping the growth of the category.

THE TASTE OF PEPSI MAX

Once again, Pepsi Max put its taste credentials on the line and went head-to-head with the biggest selling cola in the 2019 Pepsi Max Taste Challenge*. This year, 65% of consumers chose the taste of Pepsi Max over its biggest competitor, over-taking last year's result which was 61%. As we approach the festive period, 60% of households will make a cola purchase, a must-stock for retailers to take advantage of additional sales.

SUGAR-FREE

Sugar free is growing at a volume of +8% year on year.

Britvic boasts a vast range of healthier soft drink options, from on-the-go products like our Robinsons Refresh'd, Fruit Shoot and Aqua Libra, to our larger format Pepsi Max and new Tango Sugar Free variants.

SOURCE

* Pepsi MAX Taste Challenge. Blind Sampling in UK 17.07.2019 to 08.09.2019 where 26,384 of 40,839 people surveyed preferred the taste of Pepsi MAX to the UK's biggest selling cola. See www.pepsimax.co.uk for more details.





NO. 1
SQUASH
BRAND*



STOCK UP ON OUR AWARD WINNING BRANDS

*Nielsen, Total Coverage, Value Sales, MAT 31.08.19

AQUA CARPATICA

EXCEPTIONAL AQUA

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KEY BRANDS

Aqua Carpatica

With an ever-increasing focus on a healthy, active lifestyle, the beverages marketplace is redefined by discerning consumers: quality, traceability and trust are key tools that people use when adopting a brand nowadays. Aqua Carpatica's mission is to deliver on all these demands – to help maintain a healthy lifestyle for all consumers, and particularly the most vulnerable and health-conscious of all: babies, children and pregnant women.

Jean Valvis, president & CEO, says: "Our award-winning range stands out thanks to its exceptional qualities. Ethically sourced from protected springs in the Carpathian Mountains, home to over 60% of Europe's mineral water resources, it offers the perfect hydration solution: extremely low in sodium, almost nitrate free natural mineral water, with a low mineral content and naturally alkaline.



“We remain committed in our mission of offering an exceptional product to our consumers”

“For the forthcoming year, we will continue our ongoing health campaign to help the consumer understand that not all waters are created equal. Aqua Carpatica will particularly focus on supporting the most vulnerable of consumers (babies, children, pregnant women, consumers affected by diabetes or heart conditions etc) but also public initiatives, e.g. the Government's Plan on Obesity.

“We remain committed in our mission of offering an exceptional product to our consumers, nature's most perfect water, but also aim to inspire and educate our audience about all types of water and how important it is to choose wisely when it comes to hydration. We believe in being forthcoming in terms of ingredients and functionality, as well as supporting the British consumers in making informed choices.”



AWARD WINNING RANGE

naturally low sodium | natural mineral water
naturally alkaline | virtually nitrate free

It's **WATERLOVE**

for the people and the planet
our range is



aquacarpatica.co.uk

RADNOR HILLS

WE CAN CAN WATER!

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KEY BRANDS

Radnor Hills

Radnor Hills has been dedicated to producing quality spring waters and soft drinks for the last 30 years and are excited to be extending its packaging portfolio to embrace cans.

William Watkins, managing director, Radnor Hills says: "Our pure spring water is sourced from our family farm in Powys, mid-Wales, where it takes just seven minutes to filter from the ground into a can, this forms the basis for most of our soft drinks.

"Each 330ml still or sparkling water can will provide hydration whilst on-the-go in environmentally conscious packaging. We recognised the benefits of the aluminium can – with its 100% recyclability and long shelf life and wanted to introduce it into our range of products. Whilst all the products we produce are fully recyclable, aluminium cans have the highest recycling rate of them all.



“It takes just seven minutes to filter from the ground into a can”

One driving trend we are noticing in the soft drinks and water category is consumers want choice, by adding cans to our packaging portfolio we are able to offer a wide range of products in PET, RPET, Glass, Tetra Pak and now Cans, all from our one site in Wales.

"Consumers are also looking for low or no sugar options. Which is why two all-natural and completely unsweetened Infused Waters are the next product in our pipeline.

"In the meantime, the still and sparkling canned waters are coming to the UK this November and will be widely targeting multiple supermarkets, convenience stores, travel forecourts, on-board travel, independent retailers, and specialist wholesalers!

"This year we also were proud to be given with the Made in Wales Sustainable/Ethical Manufacturer Award."

SAY HELLO TO OUR NEW CANS! STOCK UP NOW



**INFINITELY
RECYCLABLE**

**CANNED AT
SOURCE IN WALES**

**NOW AVAILABLE
IN A 330ML CAN**

**STILL & SPARKLING
SPRING WATER**

**PACKAGING
SOURCED IN WALES**



/radnorhills



@radnorhills



radnor_hills



**Zero Waste
to Landfill**

**Stock up now:
sales@radnorhills.co.uk**



RADNOR

CCEP

NO.1 COLA BRAND IN GB

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Coca-Cola zero sugar
Coca-Cola Energy
Coca-Cola Signature
Mixers
Fanta
Dr Pepper
Sprite
Lilt
Schweppes
Schweppes 1783
Abbey Well
Glacéau Smartwater
Powerade
Oasis
Aquarius
Appletiser
Monster
Relentless
Capri-Sun
Fuze Tea
Honest



Simon Harrison, vice president, commercial development, at Coca-Cola European Partners GB (CCEP) says: "Following an unprecedented year for soft drinks in 2018, Coca-Cola has maintained its momentum as well as its no.1 Cola brand status in GB¹. Not only have we seen growth from our core variants², we've expanded our range of light cola flavours which have been well received, and we've taken the trademark into new segments, pushing the boundaries of this iconic brand. Our investment in our core brand and diversification has meant that Coca-Cola is delivering more sales value growth for customers over the last year than any other cola brand³.

"In addition to investing in our three core Coca-Cola variants and leveraging the brand partnerships, including the 3.5 year deal with the Premier League, our light cola flavour innovations are bringing excitement to consumers. At the beginning of the year, we launched Diet Coke Twisted Strawberry and Coca-Cola zero sugar Raspberry, and they are already worth £8.2m⁴.

"We've also added some more to the Coca-Cola brand, with the launch of Coca-Cola Energy, appealing to consumers who love the great taste of Coca-Cola but are not traditional energy drinkers. Coca-Cola Energy also includes caffeine from naturally-derived sources, guarana extracts and B vitamins, attracting a different type of drinking audience. The two 250ml variants – with and without sugar – are now worth almost £4m⁵.

"Coca-Cola is delivering more sales value growth than any other cola brand"

SOURCES

1. MAT Value, Volume (Units Sold), Nielsen Total Coverage, data till 52 Weeks w/e 07.09.2019. Coca-Cola TM = Coca-Cola Original Taste, Coca-Cola Zero Sugar, and Diet Coke.
2. Nielsen Value Total Coverage MAT All core variants, CC Reg, DKO, CCZS are growing MAT vs LY, based on data till 52 Weeks w/e 07.09.2019.
3. MAT RSV Added vs LY, Nielsen Total Coverage, data till 52 Weeks w/e 07.09.2019. Coca-Cola TM = Coca-Cola Original Taste, Coca-Cola Zero Sugar, and Diet Coke.
4. AC Nielsen YTD Total Coverage w.e. 07.09.19
5. Nielsen YTD Value Total Coverage w/e 07.09.2019.
6. MAT Volume (Units Sold), Nielsen Total Coverage, data till 52 Weeks w/e 07.09.2019. Coca-Cola TM = Coca-Cola Original Taste, Coca-Cola Zero Sugar, and Diet Coke.
7. MAT Value, Volume (Units Sold), Nielsen Total Coverage, data till 52 Weeks w/e 07.09.2019. Coca-Cola TM = Coca-Cola Original Taste, Coca-Cola Zero Sugar, and Diet Coke.
8. Nielsen Value Total Coverage MAT 07/09/2019.
9. Kantar HHP penetration 52 Week, 09.09.2019.
10. MAT Value, Volume (Units Sold), Nielsen Total Coverage, data till 52 Weeks w/e 07.09.2019. Coca-Cola TM = Coca-Cola Original Taste, Coca-Cola Zero Sugar, and Diet Coke & Kantar HHP penetration 52 Week, 09.09.2019.
11. Nielsen Total Coverage inc. Discounters, 8 w/e 29/12/18.
12. Kantar Worldpanel, July 2018.
13. Kantar Worldpanel 12 w/e 30th Dec 2018 Purchase Data.

"And we didn't stop there," adds Harrison. "To tap into cocktail culture and popularity of premium mixers, we launched Coca-Cola Signature Mixers, a range of four specially-crafted drinks that builds on the brand's longstanding reputation as the original mixer enjoyed across the world. The range was developed in partnership with five of the world's leading mixologists, and represents the first time in the brand's history that any external party has experimented with the original liquid.

"Our evolution of the Coca-Cola brand means that 2 out of 3 colas sold in GB are from the Coca-Cola range, making the brand more than twice the size of its nearest cola competitor⁷.

Diet Coke is the No.1 sugar-free cola and Coca-Cola zero sugar is the fastest growing major cola brand in GB⁸. More shoppers buy Coca-Cola original taste than any other cola competitor⁹, reinforcing our decision not to reformulate the world-famous recipe and continue to offer consumers choice.

"There is still more to come! To kick-start the Christmas countdown, we've launched Diet Coke Festive Clementine, enabling retailers to add a touch of seasonal sparkle to soft drinks offerings. Cola was the largest contributor to growth in Christmas 2018, adding £34m in value¹¹, and clementine is one of the flavours most strongly associated with the festive period¹².

"We're also bringing back Coca-Cola zero sugar Cinnamon, which was bought by over half a million shoppers in 2018, clocking up sales of £1.2m in just 14 weeks¹³. Large bottles and multi-packs of cans from the wider Coca-Cola range will feature the iconic image of the Sunbloom Father Christmas enjoying a bottle of Coca-Cola.

"Finally, it wouldn't be Christmas without the return of our iconic 'Holiday's Are Coming' ad which will be seen on TV screens across the country."





NO OTHER COLA BRAND IS DELIVERING MORE VALUE & GROWTH TO THE SOFT DRINKS CATEGORY¹

Coca-Cola™ is the No.1 cola brand in GB², more than double
the size of the nearest competitor.³

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or call Customer Hub on 0808 1 000 000.

¹Coca-Cola TM MAT RSV TY [£1.4bn]; MAT RSV Added vs LY [£99m], Nielsen Total Coverage, data till 52 Weeks w/e 07.09.2019. Coca-Cola TM = Coca-Cola Original Taste, Coca-Cola Zero Sugar, and Diet Coke.

²Coca-Cola TM MAT RSV TY [£1.4bn]; MAT Volume Units Sold TY [852m], Nielsen Total Coverage, data till 52 Weeks w/e 07.09.2019. Coca-Cola TM = Coca-Cola Original Taste, Coca-Cola Zero Sugar, and Diet Coke.

³Coca-Cola TM MAT RSV TY [£1.4bn], MAT Volume Units Sold TY [852m], vs Pepsi TM MAT RSV TY [£604m], MAT Volume Units Sold TY [378m], Nielsen Total Coverage, data till 52 Weeks w/e 07.09.2019.

CREDITON DAIRY

CHILL AND SMELL THE COFFEE

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KEY BRANDS

Arctic Iced Coffee

➡ Crediton Dairy is reaping the rewards of a busy summer for Arctic Iced Coffee, the UK's fastest growing ready to drink iced coffee range with LFL sales growth +40% YOY.

It included a significant step into functional iced coffee with the launch of the Arctic Blast range and an extensive summer experiential campaign that reached over 400 thousand consumers.

Driving incremental category growth by bringing younger shoppers to the category, there's no denying Arctic's value price point combined with great taste makes it an attractive purchase when it comes to making a soft drinks choice. Arctic is clearly meeting the needs of the younger generation.

Abigail Kelly, head of marketing & Insight at Arctic Coffee comments: "The demand for RTD iced coffee isn't abating. Indeed with category sales up +26% YOY Iced Coffee is an appealing choice in the soft drinks fixture."

TWO NEW LAUNCHES

Seeing the opportunity to extend the range Arctic has this summer launched two new variants, Arctic Blast Protein Shot and Blast Espresso Triple Shot – two



“Arctic is clearly meeting the needs of the younger generation”

cold brew coffees with added functional benefits.

Continues Kelly: “The trend for drinks that meet the consumer's need to support their health and wellbeing continues apace.

“Ideal for those who want an extra shot of caffeine or are looking for great-tasting coffee post workout, Blast Espresso and Blast Protein offer consumers even more choice in an expanding category’.

ALL SOURCES
IRI Total Market Unit Sales
52 w/e 8 September 2019.



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OF BRAND LOYALTY &
REPEAT RATES IN
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*Once they taste it
they keep coming
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WE REALLY KNOW
OUR CONSUMERS, HOW?
*Because we've spent the
summer with them!*



ATTRACTS A YOUNGER
CONSUMER TO THE CATEGORY
THAN OTHER BRANDS
Keepin' it real



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at life
...it's a blast*

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Follow us [@arcticicedcoffee](https://www.instagram.com/arcticicedcoffee)
arcticicedcoffee.co.uk



CREDITONDAIRY.CO.UK

*IRI Total Market Place Unit Sales 52 w/e 8 September 2019 Top Ten RTD Iced Coffee Brands

FENTIMANS

BOTANICAL QUALITY BREWS

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KEY BRANDS

Fentimans

↓ Fentimans use a unique process to create its drinks. Botanical brewing is a time-honoured technique to make superior beverages using a combination of infusion, skilful blending and fermentation of natural ingredients.

Andrew Jackson, marketing director, says: "All our drinks contain a fermented botanical core which provides a real depth of flavour and a three-dimensional mouthfeel. This botanical base is made with ginger root that is milled, crushed and fermented. After fermentation the liquid is blended with natural flavours and a variety of carefully selected botanicals. The process takes seven days and results in the rich and luxurious taste for which Fentimans are renowned."

CRAFTY IDEAS

The recent boom in craft soft drinks has created a new discerning premium soft drinks consumer. This consumer is seeking differentiated flavour experiences and premium quality options above and beyond ordinary carbonated soft drinks.

Jackson says: "Flavour is at the heart of the Fentimans brand, and at Fentimans we have a team of in-house flavour experts who are continuously keeping an eye on latest trends and developing new and interesting flavour profiles.

"In addition, we know that a growing

“Botanical brewing is a time-honoured technique”



number of our audience are increasingly looking for great tasting light drinks with fewer calories. At Fentimans, great flavour and quality is paramount, so we have worked to deliver a new range of 'light' drinks which do not compromise the authentic Fentimans flavour. The Fentimans 'light' range launched earlier this summer in a new 250ml bottle.

Jackson comments, "We have just launched a new brand campaign, which celebrates the amazing flavour packed into every bottle of Fentimans botanically brewed drinks. With the core message of delicious flavour derived from natural botanicals, we will continue to attract a younger audience via national brand comms campaigns, supported by digital, sampling and experiential activity.

He continues, "the new campaign is another significant building block as the company gears up for significant growth in both the premium soft drinks and mixer categories in the years ahead." ■



{ BOTANICALLY *Brewed* FENTIMANS }

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AUTHENTIC FENTIMANS FLAVOUR
NOW WITH LOWER CALORIES

Lighten up your range: sales@fentimans.com

GET MORE VITS

TASTY WAY TO HEALTHY HYDRO



DETAILS

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Steve Norris

Co-founder & Director

KEY BRANDS

Get More Vits Drinks
500ml PET
Get More Vits Drinks
for Kids 330ml PET
Get More Vits Recovery
Sports Drinks 500ml
Get More Vits Drinks
330ml Sleek Cans

Now in its 7th year of trading, Get More Vits is enjoying a stellar year, with sales up just shy of 60%. Comparing this positive performance vs 2018's record summer, founders

Chris Arrigoni and Steve Norris believe Get More Vits' excellent growth during an altogether wetter and more temperate 2019 is down to three key factors – the impactful new design which has driven core brand growth,

the expansion into other trade channels including foodservice and the introduction of new products to expand the Get More Vits brand family further.

The design overhaul has improved standout on shelf immensely, drawing shoppers to the brand and helping them to understand even more easily what each product offers in terms of taste, ingredients and functional benefit.

The Get More Vits team place taste and health at the heart of everything they do and believe the combination of natural fruit flavours, refreshing spring water and daily dose of specific vitamins – blended in a sugar-free, virtually calorie-free drink – offers consumers a unique, appealing proposition.

GROWING LISTINGS

Having just secured a listing with Brakes, Fresh Fayre plus a growing number of Country Range Group members amongst other wholesalers, the brand is starting to appear on,

“The goal of the company is to offer consumers and their families a range of tasty, sugar-free products to help them stay healthy on the go and at home”

SOURCE

1.Nielsen ScanTrack
to w/e 13 July.

and fly off, the shelves of a growing number of NHS, Education, Leisure and Workplace outlets as consumers seek healthy and tasty alternatives to regular sugary soft drinks.

The goal of the company is to offer consumers and their families a range of tasty, sugar-free products to help them stay healthy on the go and at home, so this step into Out of Home fits perfectly with their strategy.

A relaunched Get More Vits for Kids range, new Get More Vits Recovery Sports drinks and the sleek and stylish new 330ml cans – a delicious all-sparkling range comprising Apple & Raspberry B Vits, Mango & Passionfruit Vit D and Lemon & Lime Multivits, plus a new Get More Vits Active BCAA concept are also helping to drive growth in existing and new customers.

With a redesigned Get More Vits Multivitamin Chewing Gum about to hit shelves – plus further NPD planned within soft drinks and across other categories – the company's aim is to ensure the Get More Vits brand is present within all trade channels and resonates with consumers of all ages.

Additionally, the Get More Vits team continues to grow and Steve and Chris believe it is the blend of experience and youth which fosters an energetic team culture and a desire to take the brand to all corners of the UK and beyond.



Getting less sunshine? Get More Vitamin D

Now available
in 330ml cans

Sugar free still and
sparkling functional
spring water, with
natural flavours
and less than
10 calories



One of the largest and fastest growing truly independent soft drinks brands, Get More Vitamin D alone worth £2.58m annually, +69.4% year on year*

**Get
more[®]
ViTS**

getmorevits.com
info@getmorevits.com



*AC Nielsen Scantrack Data w/e 13th July 2019.

LUCOZADE RIBENA SUNTORY

REFRESHINGLY GOOD IDEAS

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Lucozade Sport
Ribena
MayTea
Orangina
Merchant's Heart
True Nopal Cactus
Fruit Water

Lucozade Ribena Suntory is taking a proactive and progressive approach to meeting shoppers' needs, which means its drinks stand out.

Scott Meredith, UK sales director at Lucozade Ribena Suntory, says: "We led the way in introducing an industry-leading health and wellbeing initiative to help consumers make healthier choices, in line with long-term trends. As part of this, we removed 50% of the sugar from our drinks.

"We are working towards an ambitious strategy to remove new plastic made from fossil fuels from our primary packaging.

"In 2007, Ribena became the first UK soft drink brand to use bottles made from 100% recycled plastic (rPET).

"In January, Ribena's best-selling bottle was light-weighted, removing 325 tonnes of plastic from production annually. We are proud to be working towards 100% sustainable plastic bottles and using fully recycled or plant-based materials across our entire portfolio by 2030.

"We have a track record of innovation of our well-loved brands that has continued to keep them front of mind.

"The heritage of a brand like Ribena is unparalleled. The Blackcurrant Artistry Since 1938 campaign, which tells the story of the craft behind Ribena, is

"The Lucozade Energy flavours range has contributed a significant £72m worth of sales to the category"

a great way of tapping into the growing desire for traditional brands with strong UK heritage."

FLAVOUR SUCCESS

Shoppers want excitement when looking for a soft drink. NPD, including flavour-based brand extensions, contributed to 35%¹ of soft drink sales in 2018.

Meredith says: "This is why we've developed new flavours across the Lucozade Sport and Lucozade Energy ranges. The Lucozade Energy flavours range has contributed a significant £72m² worth of sales to the category.

"Launches such as Lucozade Energy Apple Blast and Lucozade Energy Watermelon and Strawberry Cooler have helped build this trend.

"They are now worth over £11m³ combined. The launch of Lucozade Sport Fruit Punch in 2019 has already driven £4m⁴ worth of sales. Our successful launches across our range are a testament to our experience with flavour extensions driving sales.

"We have invested £13m in a brand-new production line at Coleford, which will allow us to increase capacity and introduce new lower-calorie drinks all while using new technology to significantly reduce energy and water use.

"We are continuing to invest in enjoyable wellness through the launch of drinks such as Ribena Frusion and the introduction of MayTea, our new tea infusions which are available in two 500ml flavours - white tea infusion with raspberry and lychee and green tea infusion with peach and mango.

"We invest heavily in innovation and making sure our drinks cater for key trends.

"This includes delivering high-impact award-winning marketing campaigns that drive sales for our retail partners - something we will continue to do so our brands grow in 2019 and beyond".

SOURCES

1. EXT IRI, Symbols & Independents, latest 52-week data to 28.10.18.
2. EXT IRI, MarketPlace GB, latest 52 week data ending 25.08.19.
3. EXT IRI, MarketPlace GB, latest 52 week data ending 25.08.19.
4. EXT IRI, MarketPlace GB, value sales, latest 52 weeks 25.08.19.





**LUCOZADE RIBENA
SUNTORY**

We're going green.

We have a plan to make all of our plastic bottles 100% sustainable by 2030



By 2025 all our primary packaging will be 100% recyclable and at least 50% of plastic that makes our bottles will be fully sustainable.

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PRINCES

THE CHAMPION OF INNOVATION

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Director at Princes

KEY BRANDS

Princes

Princes Juice recognises the need to continue to move the brand and the category forward to help attract new and existing shoppers. With the recent £60m investment to our Cardiff production site, and overall Princes consumer rebrand investment in 2019, Princes Juice is in the best possible position to continue to champion innovation and development across its ranges.

Joanna Watling, soft drinks commercial director at Princes says: The Cardiff site is a purpose built centre of excellence. The site capabilities aims to position Princes as a first choice soft drinks partner to our customers. To transform our current operational capability to meet the current and future trends of our customers, Cardiff will be a single site with processing proficiency to produce Ambient Mini, Litre & Chilled Juice. The project will deliver the installation of 10 production lines.

“Consumers want more choice in terms of products, format and health credentials. Health, in particular remains an important factor for consumers and new product development areas such as no added sugar appeals to consumers due to evolving trends around low calorie and no added sugar product options.

“Princes Juice is in the best possible position to continue to champion innovation and development”

“The new capabilities at Cardiff will allow us to offer new products, which consumers continually demand. Princes Ambient Pure Juice still plays an important part in delivering 1 of your 5 a day and continues to dominate over 60% of the ambient juice market. The new pack format for Princes Juice litre range positions Princes Juices within the category at a more premium level and the investment in Cardiff has allowed us to prepare some exciting plans for NPD for the brand over the next few years.

“This investment at the site will allow us to offer different packaging formats and capabilities, which will reinvigorate both the brand and the soft drinks category. Emerging trends are something we continually review and our NPD plans have been created around this.”

REBRANDING

As a brand, this year, Princes has invested heavily in a consumer rebrand across its Princes range of products – its first major investment in 14 years. The £5m rebrand investment has launched modernised pack designs and formats in all Princes product categories including Juice, as well as new product development throughout 2019. The rebrand has been designed to encourage purchase from new younger shoppers, while encouraging re-appraisal and increasing loyalty from the 15.7m households Princes already reaches each year.

Watling says: “Princes has been one of the nation’s favourite food and drinks brands for generations, bringing millions of people simple and delicious products since 1900. With sales of £176.3m, Princes products are picked off the shelves three times every second (107.4m packs per year).

“This is a significant step in a strategic plan Princes Group initiated two years ago to drive continuous growth and respond to challenging market conditions.”



THERE FOR JUICY
RISE AND SHINE TIMES,
AND OUR NEW PACK'S
LOOKING FINE TIMES.



THERE FOR YOU, ALL WAYS

RED BULL

ENERGISING THE CATEGORY

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KEY BRANDS

Red Bull Energy Drink
Red Bull Sugarfree
Red Bull Editions
Red Bull Sugarfree
Editions
Organics by Red Bull

Energy Drinks are one of the largest and fastest growing categories in impulse grocery, despite a challenging macro environment. Today Sports & Energy is worth £1.41bn, with growth totalling over £147m vs 2016. This growth has been fuelled by the increasing demand for Functional Energy. These drinks have added over £160m vs 2016 and are fast approaching a billion-pound segment worth £881m. The consistent performance of Functional in the category has ensured that Sports & Energy has remained in growth despite performance in other segments.

Consumers lead busy lives and under pressure to maximise their time. We see this in changing shopping habits over the last five years with increasing frequency of trips and changes in consumption behaviour, particularly out of home. More products are being consumed as snacks or for health reasons.

RED BULL OVERVIEW

Andrew McQuade, off premise sales director, says: "At Red Bull we want to enable, inspire and challenge people to do more with their time and talents."

"This is embedded at the core of all of our activity. Highlights from 2019 included us giving wings to social entrepreneurs through Red Bull Amaphiko in Bradford, challenging people to make more of their day through Active When On Lunch (AWOL), a campaign encouraging people to get active on their lunch-breaks and Red Bull Project:Pro, where our professional athletes offered insight into their daily training regimes, inspiring people to think and train like a pro. Project:Pro saw Red Bull athletes such as Ben Stokes and Jack Nowell immortalized on 78 million Red Bull cans, hitting the shelves across the summer. Additionally, at the start of the year we ran our largest ever Sugarfree campaign to offer a sugar free alternative to consumers."

"In a challenging year for the Soft

“At Red Bull we want to enable, inspire and challenge people to do more with their time and talents”



Drinks Category, Red Bull remains a genuine leader. Driving brand and sales success with range extensions, new shopper recruitment and all whilst remaining true to the core values that have made the brand one of the most recognised and successful in UK retail. Overall, Red Bull is growing +10.7% in value and +8.4% in volume, performing well across all channels within the UK, with Grocery matching this growth at (+10.7% value)."

In 2018, a total of 6.79 billion cans of Red Bull were sold worldwide, representing an increase of 7.7% against an already very successful 2017. Globally, over 75 billion cans of Red Bull have been consumed since the product's inception.

The growth of Red Bull in the latest year in the UK has been driven by an increase in penetration, with the brand now reaching 1 in 10 shoppers in the UK, an increase of 963,000 shoppers vs a year ago. Offering choice is at the centre of the Red Bull range – as consumers increasingly pick up a sugarfree alternative, the Red Bull range has been expanded to include a sugarfree variant of every pack in the range. This has seen Red Bull launch Sugarfree 473ml, Tropical Sugarfree Edition in 2018, along with Coconut Berry Sugarfree Edition in 2019. These packs have contributed over £61m to the category in the latest year, highest ever amount of Sugarfree variants sold by Red Bull. In the last year, Red Bull sold 19.7% more Sugarfree volume – with the variants bringing in 704,000 new buyers in the latest year.

Red Bull Energy Drink 250ml is not only our best-selling SKU but it's also the single most valuable soft drink in the UK. Red Bull Energy Drink 250ml is worth over £144m and continues to grow YOY. We believe this is the perfect pack size for Functional Energy and it fits most consumers' energy needs, containing the same amount of sugar as a glass of apple juice and the same amount of caffeine as a cup of coffee.

ALL SOURCES

IRI UK Off Premise 52 WE 28/09/19 vs YA
Kantar Combined Panel 52 WE 16/06/19 vs YA

WIINGS TO MAKE YOUR SALES FLY.



RED BULL GIVES YOU WIINGS.

REFRESCO

INVESTING FOR ALL OCCASIONS

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Del Monte
Emerge
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Macb
Mr Freeze
Ocean Spray
Old Jamaica
Sunpride
Sunny D
Suso
Ting
Um Bongo
Welch's

SOURCE

*Source: IRI MarketPlace, Unit Sales, Flavoured Still Water category, Scotland, 52 weeks Data ending 11th August 2019

↓ This year the soft drinks industry has seen more than its fair share of change and scrutiny over sugar content and the environment.

At Refresco they've been readying themselves for the future, investing in state-of-the-art production lines and more environmentally friendly packaging to deliver tasty, healthy drinks that will continue to resonate with consumers, whatever the occasion.

James Logan, Commercial Director said of the company's investment: "We have established new headquarters in Kegworth to reflect our UK wide reach, and our expansion in the last year means we're now able to offer production across all soft drinks categories.

"Mindful of the environmental & health impact of our drinks, we're investing in new production lines to help minimise this. These include further lines for (already well recycled) cans and clean filling technology for freezables, removing the need for preservatives.

"We are continuing to lightweight our PET bottles and will introduce robust paper straws for our mini drinks cartons by the end of 2019. As a business, all of our sites have many sustainability initiatives and we're focused on reducing energy and water consumption everywhere with the help of our passionate staff who share our environmental vision."



“Tasty, healthy drinks that resonate with consumers, whatever the occasion”

VARIETY IS KEY

The company's brand portfolio covers all drinks sectors from mixers and functional energy drinks to juices, CSDs and water, with brands like Old Jamaica and Mr Freeze dominating in their categories. A top priority for the company is making all its brands even tastier, healthier & more environmentally friendly.

Logan highlights some of the company's popular brands that have performed well this year and their achievements: "Old Jamaica and Ting are cool on-trend drinks that this summer really connected with consumers looking to kick back and enjoy their downtime. Its bars at Tom Kerridge's Pub in the Park were hugely popular and it refreshed party goers at The Notting Hill Carnival and launched its 250ml can format to create a smaller portion size.

"MacB - The No.1 Flavoured Still Water brand in Scotland* offering tasty, zero calorie hydration has seen a major boost from this year's rebrand and was a sponsor of The Great Scottish Run this October.

"Suso - A tasty high juice natural carbonate that, as its name indicates, continues to stand up and stand out is growing 8% YOY and providing Generation Z consumers with one of their five a day. Look out for some great new innovations in 2020.

"We've re-launched our Ben Shaws brand this summer. The brand, which has been in the 'fizziness' since 1871, celebrates classic British bubbles such as Dandelion & Burdock, a timeless classic.

"Our other success stories this year include Mr Freeze, growing 8% YOY, driving great value and lower calorie treats for families.

"And in the Energy & Sports sector our great tasting Emerge brand is delivering increased profits to retailers through a higher value PMP and offering excellent promotions across the wholesale channel."



Old
Jamaica

BRITISH SINCE 1871
BEN SHAW'S

Carters
ESTD 1894

Sunny
D

YOU TIME REFRESHMENT

Mr. Freeze

Calypso®

SUSO*

EMERGE
ENERGY DRINK

Ocean Spray

Del Monte
Quality

Our priority is to stay ahead of the market and anticipate consumer needs before they do! Creating healthy, tasty and sustainable refreshment to suit every drinking occasion is how we do it.

We are passionate about making drinks which naturally taste better.

Refresco

Contact us at: info.uk@refresco.com

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REMEDY DRINKS

TAKE ON THE MIGHTY BOOCH

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KEY BRANDS

Remedy Drinks

➔ Kombucha is one of the fastest growing categories in grocery as consumers reach for the right stuff in their search for healthy, tasty alternatives to soft drinks. Leading that charge is live cultured drinks company, Remedy Drinks.

Already established as the top kombucha brand in the UK¹ and the company's home market of Australia², Remedy's UK distribution has grown over five fold since January 2019, with over 10,000 distribution points.

From little things, big things grow – literally – in the case of Remedy Drinks. Sarah and Emmet Condon started Remedy on their kitchen counter. They'd been making kombucha for a while. Their kids were into it. Their mates were hooked. Family members were dropping by more often for a taste.

They took a chance and launched Remedy Drinks. They wanted to do something good. Shake things up. Make it right. They knew that healthy could also be tasty and easy.

While they've moved on from the kitchen counter, Remedy Drinks is available around the world in the UK, US, Canada, Singapore and New Zealand all the while staying true to the original vision: making drinks the old school way, live cultured, in small batches using real, all natural ingredients.

“Remedy Drinks is available around the world in the UK, US, Canada, Singapore and New Zealand all the while staying true to the original vision: shaking fizzy drinks up for good”

SOURCES

1. Nielsen Scantrack – 03/08/18 – total UK sales volumes, last 12 weeks.
2. Nielsen Scan Data – 04/08/19 – Remedy Drinks value sales, MAT.

Remedy Kombucha is still made the same way as when the founders first started brewing in their kitchen: a big pot of sweetened tea is brewed with a mother culture (also lovingly known as a SCOBY – a symbiotic culture of good bacteria and yeast) for thirty days to remove all the sugar.

The result? A tangy, tart and tasty sparkling drink that makes the perfect healthy refreshment. Remedy contains no sugar, naturally and is chock-full of all the right stuff: live cultures, organic acids and antioxidants.

TASTY, HEALTHY AND EASY

Remedy Kombucha contains no sugar, naturally giving it a clear point of difference as consumers seek tasty, healthy, convenient alternatives to conventional sugary soft drinks.

Remedy co-founder Emmet Condon says Remedy Drinks are a great fit for busy, health conscious consumers who are on the go and trying hard to make up for a busy lifestyle by eating and drinking well. Consumers are also increasingly aware of their gut health and actively seeking out live cultured drinks like kombucha as part of a healthy diet.

“People lead busy lives and they're on the move and we want to ensure there's a healthy, tasty choice wherever they are,” explains Emmet Condon.

“Remedy Kombucha is available in a range of formats so whether you're on the road and choosing a 250ml can Remedy Kombucha Apple Crisp for a quick, refreshing drink or bundled in a lunchtime meal deal, we meet consumers with the right range, in the right place at the right time.”

While some true believers can't go past Remedy Kombucha Original, Remedy uses all natural ingredients to play with other flavour combos from healthy takes on fizzy faves like Ginger Lemon and Raspberry Lemonade to fresh flavours like Lemon, Lime & Mint.



SHAKING FIZZY DRINKS UP FOR GOOD



NO SUGAR,
NATURALLY

THE UK'S **#1*** KOMBUCHA BRAND!



For more information visit remedydrinks.com or
get in touch at contact.uk@remedydrinks.com

*SOURCE: NIELSEN SCANTRACK - 03/08/19 - TOTAL UK SALES VOLUMES, LAST 12 WEEKS.

SODASTREAM

IT'S SPARKLING GROWTH

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UK Ecommerce &
Digital Manager
Debbie Jones
UK Financial Controller

KEY BRANDS

SodaStream

↙ In 1903, Guy Gilbey of W&A Gilbey, the London based gin distillers, formed the SodaStream company and launched a forerunner of what would become the "Apparatus for aerating liquids".

Sold to British high society, including the royal family, the machine enabled butlers to make soda water for their employers and visiting guests.

In the 1920's the Royal family went SodaStream crazy and in 1928 the Prince of Wales granted a Royal Warrant to the company and the model became known as "the Prince of Wales machine".

Fast forward more than 100 years and the company, whose roots are firmly founded in the UK, operates across 50 countries and in more than 50,000 retail locations.

In a world where the public are more conscious than ever of the harmful impact single-use plastic waste has on the planet, consumers continue to fall in love with SodaStream.

A BLOSSOMING LOVE AFFAIR

Sparkling SodaStream sales in the UK make it clear how the love affair is blossoming.

It is already recognised as the world's number one sparkling water brand and consumers have bought into

“We are promoting healthier lifestyles and supporting our customers to drink more water and more often”

SodaStream's vision of a clean, healthy planet and their mission to reduce avoidable plastic waste.

That message is certainly getting through if the record-breaking sales in 2019 are anything to go by. Tiago Alves, UK general manager says: "We are promoting healthier lifestyles and supporting our customers to drink more water and more often. Our research shows that people who own a sparkling water maker drink more water on average. Millions of people are already using SodaStream and doing their part to reduce plastic waste – that's why we're the world's largest sparkling water brand."

In the past year, SodaStream has also launched a number of new innovative products to meet consumers' demands in an ever increasing environmental and health conscious world. Such innovations include the launch of Soda Press, a range of healthier, certified organic, vegan-friendly, gluten-free and low sugar syrups to add distinctive flavours to sparkling water.

Alves says: "We want to encourage consumers to have fun with water and by customising their drinks from traditional favourites such as Old Fashioned Lemonade to the excitement of Raspberry & Mint, they're able to do that with our new Soda Press range. Also, the launch of My Only Bottle is our latest initiative to help customer reduce plastic waste. This is the brand's first UV-resistant, dishwasher-friendly reusable bottle."

"So, the UK public's love affair with SodaStream continues, not purely because of its environmental credentials but also because the spirit of the sparkling water maker – from the height of its popularity in the 1980's to its current renaissance for wholly different reasons is appealing to a new generation of admirers."

"2020 looks set to be another great year for the company as its popularity continues to grow."



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KEY BRANDS

Upbeat Drinks

↙ Gone are the days when soft drinks need only provide hydration or sugary energy. Over the last twelve months, innovation in the Soft Drink category has exploded, giving birth to a new wave of products.

In the last year, the Water Plus category alone has grown 12% and Natural Energy by a staggering 22% creating a clear pathway of consumer demand for the Soft Drinks category. Drinks must do more.

But what do they actually 'do'? Rewind five years and consumers were using supplements such as vitamins and caffeine to deliver a variety of benefits ranging from immunity to mental performance.

Now, time-poor and increasingly demanding consumers are looking to their soft drinks to provide these benefits, whilst still delivering on price, hydration, taste and naturalness.

The soft drink category has most certainly responded to this demand. The category now boasts an impressive range of functional drinks from kombuchas, to vitamin juices. A prime example of this innovation is Upbeat Drinks. Upbeat make a range of Juice plus and fruit carbonate drinks with added protein and targeted ingredients designed to help consumers feel, think and drink positive.

Upbeat have fruity, protein enriched, zero sugar drinks to fulfil a range of functional consumer need states: strength, energy and mental performance.



“It's no longer enough to simply provide great tasting hydration. Drinks must do more”

SPARKLING IDEAS

Building on the core Juicy range, available in three flavours, Upbeat are launching a range of sparkling functional fruit beverages. In 330ml cans, the drinks address three consumer need states, supported by protein.

Blueberry Raspberry and Orange Mango 'Daily Boost' are high in energy-yielding B-Vitamins. Lemon Lime 'Natural Energy' contains guarana and ginseng for a natural lift. Orange Passionfruit 'Strength and Focus' has added natural caffeine and essential amino acids (BCAA's to build on the core protein).

Mark Neville, founder says: “We know that today's consumers are naturally choosing a needs-based diet that focusses on physical and mental performance alongside taste and treat.”

Reflecting on Upbeat's marketing strategy, Neville says: “Shelf edge presence through pack stand out, 'packvertising' and pricing is critical. We know consumers shop with their senses so having a drink that looks and tastes great is the only long term route to success.”

Upbeat's Juicy Protein Water range has national distribution. Their hero flavour Blueberry & Raspberry is currently driving 60% incrementality to the soft drinks category.

Launching in November 2019, Upbeat drinks will be first to market with their real fruit Sparkling Protein Water range.



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KEY BRANDS

Vithit

➡ Vithit is leading the functional beverage category across all its national retailers including: Sainsbury's, Boots and WHSmith.

Vithit is a low-calorie vitamin drink infused with Juice, Tea and Water and was created as a low sugar alternative over 15 years ago.

Vithit contains less than six grams of sugar from juice which gives us an advantage in this expanding wellness sector.

What makes Vithit stand out in this highly competitive market is that it has 80% less sugar and calories than standard soft drinks.

Vithit also uniquely contains 100% RDA of eight vital vitamins as well as various teas that have many extra health benefits. However most importantly our drinks taste as good or better than the sugar filled alternatives.

"The British public will never compromise on taste and if a brand is to succeed not only does it need to fulfil healthy requirements but also taste great", says Gary Lavin, founder.

"At Vithit we believe that the taste stands on it's own, that is why at the core of our marketing is sampling.

When you taste Vithit you know that low sugar doesn't have to mean low in taste and our repeat purchase sales speak for themselves."

Vithit also knows that in the highly competitive store environment display is vital if you want your product to be seen.

"Both our sampling and in-store display work side by side to expand our brand", states Vithit UK sales director, Ryan Hacker.

This year will see Vithit roll out an extensive sampling campaign across London city to 'get the product into people's hands'.

"For us liquid on lips is the best method of Marketing," says international brand and marketing manager, Rachael Gillmor Murphy.



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+ + + +
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