

Soft Drinks

Nichols plc

the home of

DISTINCTIVE

BRANDS



VIMTO HIGHEST EVER
BRAND VALUE **£107m**⁽¹⁾

100% HFSS
COMPLIANT⁽²⁾

Levi Roots DRIVING
GROWTH **+20%**⁽³⁾

⁽¹⁾ Nielsen IQ RMS data for the Squash, Flavoured Carbonates, RTD Still, and Flavoured Water categories for the 12-month period ending 10.09.2022 for the GB Total Coverage market. ⁽²⁾ 100% HFSS compliant on our UK packaged core range, products contain less than 4.5g of sugar/100ml. ⁽³⁾ Nielsen IQ RMS data for the Flavoured Carbonates category for the 12-month period ending 10.09.2022 for the GB Total Impulse market.

Nichols plc

Happier future for soft drinks

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As shopper behaviour evolves and reflects the wider socio-economic backdrop, it is fundamental for suppliers to continuously evaluate how the soft drinks category can adapt to best meet shopper and consumer needs, says Emma Hunt, marketing director at Nichols. “At Nichols, we believe there are four key areas that will impact category performance:

• **Evolving shopper dynamics** – “Significant changes in purchasing and consumption habits during the pandemic have now evolved further due to current inflationary and cost-of-living pressures. In times of uncertainty, consumers gravitate to brands they know and trust. Vimto has over 100 years’ rich heritage, so has an important role to play in the current climate. This is reflected in its sales, which are worth £107m and growing by 7.5%¹, with one in four UK households now buying Vimto².

• **Value** – “As consumers seek greater value from their purchases, retailers should consider stocking products with multiple benefits,” she says. “Squash is one of the most cost-effective ways to add flavour to water and, as such, will play a vital role over the next year. Last year we relaunched our Vimto squash range to include the added benefits of Vitamins C&D³. Vimto is the No.2 squash brand in value sales and the UK’s fastest-growing squash brand⁴.

• **Post-Covid** – “Squash consumption grew exponentially over the past two years as at-home occasions increased by an incremental 128 million⁵,” reveals Hunt. “Even as we emerge from the



“It is fundamental for suppliers to continuously evaluate how the soft drinks category can adapt to best meet shopper and consumer needs”

pandemic, many adopted habits have remained, so we are confident squash will continue to be a popular household staple in the coming months.

“A varied range, including larger formats, leans into broader in-home occasions and meets shopper needs – for example, the Big Night In. Our Vimto and Levi Roots 2L bottle carbonated variants in unique flavours offer perfect options for at-home consumption occasions and play an important role in consumers’ repertoire.

“Health-conscious consumers also look to brands to help them lead a balanced lifestyle. Championing the ‘healthy hydration’ trend, our innovation allows shoppers to make healthier choices. In the past 10 years we’ve cut 1,333 tonnes of added sugar⁶, ensuring our UK packaged products remain exempt from the SDIL and are HFSS-compliant, and 99% of our UK ranges are now low- or no-added sugar.”

• **Sustainability** – “Consumers continue to value the importance of sustainability and the role that brands play.

“Our Feel Good brand provides 100% natural ingredients and donates 3% of sales to projects that support marine ecosystems via its #youbuyweplant initiative. Our UK packaged products contain at least 30% rPET*, with our squash range containing 51% rPET*, and we are striving to reach 100% by 2025.”

Source

¹ Nielsen IQ RMS data for the Squash, Flavoured Carbonates, RTD Still, and Flavoured Water categories for the 12-month period ending 10.09.2022 for the GB Total Coverage market

² Kantar WorldPanelOnline, MAT 12.06.22

³ Vitamin C&D is in the following Vimto squash products: Vimto Original, Vimto No Added Sugar, Vimto Orange, Strawberry & Lime, Vimto Mango, Strawberry & Pineapple, Vimto Orange & Pineapple, Vimto Mango & Passionfruit and Winter Warmer. All flavours contain Vitamin D

⁴ Nielsen IQ RMS data for the Squash category (Brands over £40m) for the 12-month period ending 10.09.2022 for the GB Total Coverage market

⁵ Kantar, Usage, Soft Drinks, Servings, Meal Occasions, Demographics, Spend, 52 w/e June 22, June 21, March 20

⁶ Outlined in 2022 Nichols Happier Future Report – reducing the average sugar content from 8g/100ml in 2021 to 5g/100ml by 2021

*At time of writing, 10.10.22



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Analysis

Diverse demands

The sheer diversity of the lucrative soft drinks category indicates that growth is likely to continue, even amidst a cost-of-living crisis. Factors driving the market include ongoing consumer concerns with health & wellbeing. Yet the real key to success remains taste.



With a soft drink to suit pretty much every consumer occasion and need, the category continues to provide grocery retailers with a lucrative source of income. However, suppliers are realising that they need to remain agile and address the varied on-the-go and at-home demands in order to stay ahead of the game.

Barr Soft Drinks marketing director Adrian Troy maintains that the soft drinks category continues to be one of the most profitable for retailers, “worth £10.6bn and growing by 10.3% YOY¹”. Over the last year, the company’s brands have delivered an additional £28.2m² in retail sales value to the category, he says.

Within this, flavoured carbonates achieved the biggest sub-category uplift, growing 55% in retail³, while flavoured water was also at “an all-time

high” with flavoured sparkling water sales up 16% YOY⁴, reveals Troy.

He notes that the unprecedented temperatures during the summer this year resulted in an extra £75m in soft drinks sales in just one week at the peak of the heatwave, vs 2019⁵.

On-the-go sales, revived after the easing of Covid lockdowns and comprising drinks less than 750ml, are seeing significant growth, up 22.8% year on year⁶, says Purity Soft Drinks CEO Sarah Baldwin. Within that, fruit juice on-the-go drinks are the second-fastest growing, up 29%⁷, she says.

Juice drinks make up 7.3%⁸ of the total soft drinks category and are seeing 11.3%⁹ growth, adds Alpesh Mistry, sales director at Suntory Beverage & Food GB&I. “As the market continues to emerge from the pandemic and with lockdown restrictions now fully eased,

on-the-go formats are performing very strongly in this channel too, up 26%¹⁰ on a year ago.”

However, the cost-of-living pressures are impacting the sector in a couple of ways. Ben Parker, retail commercial director at Britvic, anticipates that, with consumers feeling the pinch from rising living costs and inflation, they will move towards smaller transactions and smaller pack sizes. “At the same time we’re also seeing a ‘lipstick effect’, where shoppers are switching from expensive purchases to treating themselves with small indulgences. This presents opportunities for retailers to take advantage of shopper on a treating mission, which has increased by 1.9ppts¹¹ vs last year.”

In addition, online shopping and the revived increase in at-home entertaining, as consumers look to



£10.6bn

Value of the UK's soft drinks market¹

IRI

+55%

Rise in flavoured carbonates sub-category in retail³

IRI

£1.8bn

Value of the sports & energy sub-category in the UK²⁷

Nielsen

£252m

Value of the RTD coffee sectorⁱⁱⁱ

Nielsen

save money, mean that multipacks will continue to retain their popularity in online shopping baskets. “However, we must remember that soft drinks is an impulsive category, so it’s important for suppliers and retailers to consider different ways to encourage online shoppers, who are harder to reach and are meticulously planning their shop, to choose and purchase soft drinks,” adds Parker.

“After a year of impressive growth in 2021, the soft drinks category has continued to increase in value¹² and CCEP has been leading this growth, with our portfolio having grown in value by 8.9%¹³,” says Martin Attock, vice-president of commercial development at Coca-Cola Europacific Partners (CCEP). Category growth has been fuelled by a combination of rising on-the-go consumption following

the pandemic, and sustained sales of sharing packs as people continue to enjoy social occasions in the home, he notes. “Across key soft drinks sectors like colas and flavoured carbonates, multipack sales continue to grow¹⁴, while sales of adult soft drinks are also in growth, indicating that people are still enjoying more sophisticated nights at home.

“Even in categories that have traditionally been more weighted towards on-the-go, like energy and RTD coffee, we’ve seen a rise in sales of take-home packs. RTD coffee sharing packs are becoming increasingly popular¹⁵ as more people look for a pick-me-up when they’re working from home. To tap into this, we launched our best-selling Latte and Caramel Latte RTD coffees in 4x 250ml multipacks in grocery last year. More recently, we’ve launched Costa’s

The Big Latte and The Big Caramel Latte multi-serve sharing packs to our range as another way to capitalise on this growing opportunity.”

Red Bull reveals that energy drink multipacks have delivered 68% incremental growth¹⁶ to the sports & energy category, driven by existing shoppers trading up from single cans to multipacks. Overall, multipacks are in “strong double-digit growth, up 13.2% MAT¹⁷,” it adds.

Companies have moved with the market changes. Get More Vits, for example, developed and marketed its take-home 1L range following the “all but disappearance” of the lunchtime workplace and education trade during 2020, with a resulting growth of 157% in that format since 2019¹⁸, it says.

Yet while cost-of-living dominates the conversation around current

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consumer purchasing patterns, with families facing a £454 increase in their average grocery costs¹⁹, other factors are also at play right now, argues Princes Group brand marketing director Jeremy Gibson. “Health, for example, is something which families are prioritising more than ever, with many actively seeking out products associated with benefiting our nutritional wellbeing,” he says. “Unfortunately, the need to stick to certain budgets means we often compromise on the health benefits of a food or drink. However, this could also encourage consumers to get more adventurous with their grocery shop and try new products that offer the best of both worlds in their eyes.”

Taste and flavour inspiration

Soft drinks suppliers are pretty united in their view that, whatever other properties their products have to offer, taste is the most important factor in soft drinks purchase decisions.

“Nine out of 10 shoppers say taste is the most important consideration when buying a soft drink²⁰,” confirms Britvic’s Parker, who notes this was fundamental in its decision to keep flavour a priority when formulating the company’s Rockstar range of energy drinks. Flavour innovation is crucial in keeping shoppers excited by soft drinks, he adds. Britvic’s most recent innovation is the launch of Tango Editions, a sugar-free rotational flavour series, “which aims to combine bold flavours, bold liquids and bold pack designs”. The first of these is Tango Berry Peachy Sugar Free, he reveals.

According to Troy at Barr Soft Drinks, taste remains the number one motivation for shoppers when choosing a soft drink, with new flavours driving category growth. “Exotic fruity combinations remain popular with soft drinks consumers,” he says, adding that flavour innovations are becoming more complex as consumers look for new and interesting tastes. “New flavours have always been important in the energy category, delivering £131m in value sales²¹ last year alone,” he adds, noting that the company launched an Apple & Guava option to its Rubicon Raw range in May this year.

Taste is the number one driver of choice in soft drinks²², agrees Nichols plc marketing director Emma



Hunt. “Flavour innovation is key to maximising this opportunity. The company’s new Vimto Cherry, Raspberry & Blackcurrant Sparkling and Vimto Blackberry, Raspberry & Blueberry Still formats tap into the emerging consumer trends of healthy hydration and flavour exploration, which she says are “enduring within the soft drinks category, despite the emergence of new entrants”. In fact, colas, flavoured carbonates and water are contributing over £496m of growth²³ in the category, she adds.

Hot & spicy, smoky, and tart & sour are the key taste trends being reflected in mixers supplied by The Artisan Drinks Co, which has recently introduced Yuzu Tokyo Tonic to meet the latter flavour trend, reveals head of marketing Laurence Hinton.

Meanwhile, functional shots supplier Moju also expects spicy, savoury and umami flavours to continue to grow, alongside the development

of botanicals, herbs and less sweet flavour profiles in general. “Ginger and cayenne, once perceived as more niche are now starting to break into the mainstream and this highlights the need for more caffeine-free and natural options for consumers seeking out energy and vitality,” it says. “We also expect to see more savoury hints such as cucumber and mint to appear, borrowing from the world of high-end alcoholic mixers and bringing more sophistication in flavour profiles for those looking for healthy and natural options.”

“New and discerning premium soft drinks shoppers expect innovative and differentiated flavour experiences. 73% of consumers cite taste as key decision factor at purchase level²⁴,” says Clearly Drinks marketing and strategy director Susanne Wright. “In 2022, we launched Upstream dragonfruit and berry to tap into the demand for adventurous, differentiated flavours.”



Botanicals, mocktails and mixers

Belvoir Farm Drinks MD Peverel Manners says there is a real movement for consumers to reconnect with nature and choose natural ingredients where possible. The company's latest product innovation includes Botanical Sodas, launched in March this year, and Non-alcoholic Cocktails, which he says "are pulling in a raft of new shoppers". "RTD mocktails – the growth of low & no – has been a key driver in the success of fruit flavours, and drinks are going beyond traditional flavours with the use of new and unusual fruits," he says. This autumn,

a new Lime & Yuzu Mojito will join its mocktail line-up. For its Botanical Sodas, the company aimed for "a more grown-up and sophisticated flavour profile, not just another flavoured water or flavoured tonic", he says.

Princes Group has introduced a trio of "cocktail-inspired, alcohol-free juices" under the Skinny Mixers brand. "Interest in mocktails and non-alcoholic beverages grew 40% and 41% year-on-year respectively¹ as more and more people look to reduce their alcohol intake or cut it out completely," says brand marketing director Jeremy

Gibson. In addition, with a study by Kerry recently revealing that 83% of consumers believe botanicals offer health benefits¹, Princes now offers two Botanicals in apple, mango & cardamon and apple, pineapple & lemongrass flavours.

Meanwhile, with consumers having become more experimental with their flavoured mixers, The Artisan Drinks Co is seeing "huge growth from its flavoured mixers", in particular Amalfi Lime Tonic, Agave Lemon Tonic, Fiery Ginger Beer and Barrel Smoked Cola, which it says mix very well with upcoming spirits such as rum, tequila and

vodka. "Where other mixer brands develop flavours that go well with various gins, we have a range that is developed deliberately to match with this new generation of craft spirits," says Laurence Hinton, head of marketing at the company.

Hinton also sees a clear trend in premium on-the-go RTD mocktails and notes that low & no alcohol options will make the market more diverse, rather than create increased competition for other soft drinks. It will also "provide consumers with more choice and give the entire industry new avenues to work with", he says.

Soft drinks is a category that constantly showcases a range of new and interesting flavours and combinations every year, and, in that respect, fulfils an important role in introducing innovative taste sensations to consumers, says Get More Vits. However the company feels mainstream flavours, such as orange, citrus and tropical, will remain the most popular, so the focus should be on the quality of those key flavours. Its latest launches feature peach & apricot on its Get More Vits Fibre Water and pink grapefruit on its Get More Vits Vitamin B12, which it says have received great feedback on their taste.

Tropical and exotic flavours have grown 23% more than all other mainstream flavours on offer within sports & energy²⁵, says Red Bull, which points to the popularity of its Red Bull Tropical Edition Sugarfree. "Flavours are a proven way of bringing new shoppers into the energy drinks category," it adds.

Wanis International Foods agrees that exotic/tropical blends continue to be popular, with some of the less common flavours such as hibiscus, lychee, guava and grape also proving of interest. "Our Tropical Sun brand enables us to capitalise on this with the recent launch of three new high-juice drinks – Tamarind, Sugarcane and Lychee – shortly to be joined by other similarly exotic flavours," says commercial director George Phillips.

When it comes to cold coffee, caramel continues to be a key flavour in the category, says FrieslandCampina UK marketing manager NPD Gabriella Sudall. "We've seen more daring flavours within the traditional soft drinks and energy drinks market, which can add exotic elements more easily than we can with coffee, so we'd like to compete them in the years ahead, ensuring coffee remains an innovative and tasty option."

As for flavoured milk, chocolate and

strawberry are still the most popular flavours, she notes, with the company relaunching its limited edition Choc Caramel this year, due to consumer demand.

Health, energy & functionality

Consumers' focus on health & wellbeing in general is driving a number of trends, including shoppers seeking out reduced- and zero-sugar options, as well as more natural ingredients.

A government survey has shown that 65% of people are seeking a healthier lifestyle and 49% of people are using diet to improve mood and wellbeing²⁶, says Purity Soft Drinks' Baldwin.

"This is a demand that retailers can tap into by offering natural, healthier drinks." Catering to this market, it offers Juice Burst, in orange or apple flavours, which it says comprises one of consumers' five-a-day and contains no added sugar, no artificial flavours and no sweeteners.

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The sports & energy category has seen a steep upward trajectory in growth over the last year, totalling more than £254.6m vs 2021 and is now worth over £1.8bn²⁷, says Red Bull. This growth has been fuelled by the increased demand for functional energy drinks among shoppers, which have added over £171.6m in value vs YA and are worth over £1.2bn annually²⁸, it adds.

That said, the market for functional beverages is evolving, notes Red Bull. While shoppers state they desire more physical energy than ever since the lockdowns have ended²⁹, they also want more from their purchase than ever before, seeking a balance between enjoyment and practicality, as well as for health³⁰, it says.

Healthy lifestyle consumers are now looking for products that can satisfy all their needs in one go, agrees Upbeat Drinks head of marketing Carlotta Cattelani. "They want all-in-one solutions they can grab on-the-go that combine all the benefits of vitamin water, healthy energy drinks and protein shakes – three of the fastest-growing segments in the soft drinks category.

"Functionality per se does not do the trick anymore," adds Cattelani, "We are now interacting with a market that is spoilt for choice and does not settle for anything that is not perfectly curated – and rightly so. Increased demand and a more attentive audience are pushing innovation to a new level of sophistication from both a flavour and formulation point of view."

That said, she notes that instability and cost of living are impacting every sector and, while the industry offers very targeted functionalities to respond to specific demands, what the market lacks is one unique product able to satisfy different needs. In July, Upbeat launched "a new generation of functional drinks", containing clear whey isolate protein, BCAA, vitamin B complex and without natural caffeine and zero sugar, she reveals.

Energy drinks are seeing notable YOY growth of over 14%³¹ and, within this, Lucozade Energy has grown 10%³² over the last year, says Suntory's Mistry. "The sports drink segment is incredibly buoyant too, and Lucozade Sport is up 34%³³ on a year ago, as 2022 has seen many high-profile sporting



events throughout the year. "This year retailers can continue tapping into the sporting occasion even throughout the winter, when the FIFA Football World Cup takes place."

Barr Soft Drinks' Troy points out that "energy is no longer the reserve of the traditionally young male gamer. These shoppers have grown up but stayed with the category, and the average age of the energy drinker is now older than you may think, at 31," he says. "Their needs have moved on and more energy drinkers are now looking for drinks that fuel their active lifestyle."

Grenade general manager (drinks) Dan Broughton says consumers are looking to functional drinks with added health benefits to fuel their fitness goals and retailers are jumping on this trend. "Over the last year, the functional energy drink market has exploded, with 72% of consumers now looking for products with added health benefits³⁴," he notes. "Simply touting

low sugar credentials alone isn't enough for today's ever-discerning and health-conscious consumer.

"Testament to this, Grenade Energy, which is predicted to double in the next year to £350m³⁵, has launched into Sainsbury's, Asda, Londis and Pure Gym this year, with more in the pipeline," he says. "It's a perfect incremental growth opportunity for retailers to consider, as the trend towards functional ingredients continues."

Natural ingredients appeal to one in three sports and energy drink users³⁶, says Britvic's Parker. "The importance of natural ingredients increases with age³⁷ and, with the stimulants category being heavily skewed towards younger shoppers, this represents an opportunity to expand the appeal of energy drinks." As such, he says retailers should consider evolving their energy offering away from just stimulants, giving enough space on the



Rising potential for RTD coffees

“The RTD coffee sector continues to perform well post-pandemic, worth more than £252mⁱⁱⁱ and up 31% in value over the past 12 months^{iv},” says CCEP VP commercial development Martin Attock. “It is a category with huge growth potential and is one retailers should capitalise on. Costa Coffee RTD is growing at almost three times the rate of the RTD coffee segment, up 85%^v in value and purchased by more than one million new households for the first time during 2021^{vi},” he adds. The company recently added a Frappé range to its line-up, including Caramel Swirl and Choc Fudge Brownie flavours.

RTD coffee is up 35.4% MAT^{vii}, says Adam Hacking, head of beverages at Arla, which handles the Starbucks RTD brand. Starbucks chilled coffee is now worth £107m, and added more than £26m in incremental sales to the category in 2021^{viii}, he says. “With no obvious downturn in RTD coffee consumption... there is an opportunity for it to evolve to reflect the wider variety of formats seen in the broader soft drinks category.” He says limited editions will become more of a feature within the Starbucks RTD range, with a Starbucks Limited Edition Frappuccino Toffee Honeycomb introduced in June this year.

Cold coffee will continue to strike a chord with consumers, with new flavour and plant-based options adding to the sector’s growth, says FrieslandCampina marketing manager NPD Gabriella Sudall. With cold coffee drinks growing 25% year-on-year^{ix} in the UK, its Barista RTD cold coffee is now a £1.7m brand^x, she says. “Sales of RTD coffee have reached £225m in the UK^{xi}, and it is the largest category segment, partly driven by an increase in chilled options available from coffee shops. Consumers are now much more aware of cold coffee and stocking a variety of RTD coffees is a must for convenience stores.”

fixture to growing brands in natural energy, such as Purdey’s.

Last year the company released two new products Refocus (containing guarana and B-vitamins) and Replenish (enriched with B-vitamins and magnesium), which offer multiple benefits for those seeking energy, but looking for a more natural lift. “Our ambition is to make functional wellness drinks accessible to more people, by aligning with these differing consumer needs and providing great taste,” he comments.

For energy drinks, both on-the-go and take-home formats are in growth³⁸, with diversification helping the sector to become more mainstream as it now offers the same great tastes and flavours as many core soft drinks sectors, but with added functional benefits, says CCEP’s Attock. “Worth more than £1.5bn, energy drinks is one of the fastest-growing sectors in soft drinks³⁹. Research has revealed that

25% of energy drinkers entered the category for the first time last year⁴⁰, suggesting that the broader choice available within energy may be helping to recruit new shoppers.”

Functionality has been embedded as a key feature for the soft drinks category for quite some time as consumers are looking for ways to get more from their soft drinks consumption moments – whether this is from energy or coffee drinks, additional benefits to improve gut health or vitamin fortification, says Nichols’ Hunt. The company fortified its Vimto Squash range with Vitamins C & D last year.

We know that functional drinks were worth £240.2m in 2021, totalling 2.7% of the soft drinks market⁴¹, with this year’s current data pointing to continued growth, says FrieslandCampina’s Sudall. “Yazoo and Yazoo Kids are rich in calcium, which contributes to the maintenance of normal bones; rich in

protein, which contributes to normal energy-yielding metabolism; and a source of vitamin B2, which contributes to the maintenance of normal red blood cells and the reduction of tiredness and fatigue.”

Moju, which says it leads the functional shots category, with a 53% market share⁴², believes the concept of proactive health has now become a mainstream trend, with 69% of consumers now claiming to be proactively leading a healthy lifestyle⁴³. The brand bases its products on the three pillars of vitality/natural energy; gut health/prebiotics and immunity/vitamins. While the return in footfall in the OOH and impulse channel had a positive impact on the brand’s sales, prompting it to support this with its largest sampling campaign to date, the shift to hybrid working has contributed further growth in Moju’s take-home multiserve dosing bottles, now its leading format in volume terms, it says.

Analysis

“We can see demand for functional drinks growing as consumers look to get more from their lunchtime drink – and what they drink at home – rather than just taste and hydration,” says Get More Vits. Its range of fruit-flavoured vitamin drinks each contains daily doses of specific vitamins and it expects to see this trend continuing.

Water: creating new ripples

While flavoured waters are becoming increasingly popular, with brands like Aqua Carpatica taking that path in its latest innovation, others such as CanO Water are sticking to still and sparkling varieties.

“This is primarily because we started CanO Water to tackle pollution within the plastic bottles water market,” says co-founder & marketing director Josh White. “We have intentionally entered the largest soft drinks category with a plastic issue and are aware we have a long journey ahead of us. There is no need for us to enter the flavoured water market because there are already some great functional brands out there that are packaging these in cans, whereas water in a can was a gap we needed to fill.”

“With two-thirds of consumers proactively trying to lead a healthy lifestyle, and the growing focus on general health & wellbeing... that has driven flavoured water growth overall but specifically brands that offer taste and health,” says Clearly Drinks’ Wright. “We all want to consume healthy products to support our general wellbeing. But we also want to indulge and enjoy full flavoured, tasty products,” she says, adding that its Perfectly Clear brand of natural fruity waters with zero sugar has brought 382,000 new buyers in the category over a period of 52 weeks (ending 17.07.22).

“Shoppers are increasingly looking for added value or ‘plus’ offerings and functional drinks offer a wide range of health benefits over and above energy, appealing to shoppers who care about health and wellness. Traditional ways to take supplements, i.e. tablets, can feel medicinal and arduous. Clearly Drinks has therefore recently launched perfectly me – supplement drinks designed specifically for pregnancy and the menopause, containing all the vitamins you would get from a tablet but in a 150ml, easy to consume drink.”



Social media, celebrity influencers

Interestingly, there is a range of opinion on whether celebrity influencers continue to hold sway with younger audiences. Some suppliers have avoided their use in favour of other avenues, while some still continue to believe in the power of celebrity endorsement, and yet others believe a balance with other forms of marketing is key.

“We haven’t used celebrity influencers previously, but are not against them playing a role within our wider marketing plan – as long as they carry the same ideologies as Artisan Drinks Co,” says Hinton. However, he points out that social media is just one channel within the marketing mix and it is equally important to have a solid OOH plan to build brand awareness, as well as solid PR and digital marketing plans. “TV advertising still has more power to reach more people at scale and... as it becomes smarter and

more targeted, its advertising power increases,” he says. “However, it needs to form part of the overall marketing mix, alongside social media to have real cut-through.”

Belvoir Farm Drinks has “eschewed celebrities and actors”, instead making its own team the stars of the show for its first TV campaign, launched in July this year. “Actors and high-profile names can be a great way to get people’s attention, but we wanted to highlight the efforts of our own team,” says managing director Peverel Manners. The company has also grown its presence on social media, in particular Instagram, and agrees that this is an integral part of its strategy to attract a younger audience.

At Clearly Drinks, on the other hand, social media and influencers form an important part of the company’s communications strategies, with increasing investment in influencers to raise awareness of its brands with

HFSS compliance opportunity

A wide range of brands have already achieved HFSS compliance, so competition to ensure strong fixture placement is rife.

“There is an opportunity for retailers to drive sales by increasing visibility of HFSS-compliant soft drinks and placing these in optimum fixture positions, such as near the checkout and front of store,” says Barr Soft Drinks marketing director Adrian Troy, who notes that 98% of the company’s range is compliant.

“With 73% of soft drinks value sales coming from HFSS-compliant products^{xii}, the category is in a strong position to fill

spaces on-shelf at till points, front of store or aisle ends left vacant by categories that have a high proportion of non-compliant products,” says CCEP VP commercial development Martin Attock. “86%^{xiii} of the CCEP portfolio is now HFSS-exempt,” he notes.

At Friesland-Campina, marketing manager NPD Gabriella Sudall says flavoured milks are often perceived to be higher in sugar or fat, but it has worked hard to ensure its products fit within the HFSS regulations while simultaneously offering an indulgent treat for consumers. All of its Yazoo milk

drinks are HFSS-compliant, she says. “So, we can continue to invest in the category – with both above the line advertisements and in-store promotions, as well as feature and display.”

According to Suntory Beverage & Food GB&I sales director Alpesh Mistry, every single bottle of Lucozade and Ribena in all flavours and variants are already non-HFSS due to the reformulation carried out over the past few years to reduce sugar content in its beverages. As a result, he says, no changes to promotions, either in-store or online are necessary for its core brands.

One company sticking to its guns when it comes to HFSS is Wanis International Foods, with its Tropical Vibes and Tropical Sun brands. “Unlike some other brands, we have not sought to reformulate our products, but instead offer a breadth of range to appeal to different consumers,” it says.

“That said, HFSS legislation is a reality and it is clear that many consumers are seeking healthier options.”

The company’s Tropical Sun Coconut Water and Aloe Vera drinks, although not new to the market, are HFSS-compliant, it adds.

the target audience. “Social media and influencers are a part of the everyday life of the majority of our consumers, so form an important media with which to engage,” says Wright.

At Purity Soft Drinks, the company’s Juice Burst brand sees its highest awareness and largest consumer group among the Gen Z demographic, reveals Baldwin. “Awareness among this demographic has come about as a result of both targeted social media content, as well as successful influencer campaigns over the past few years,” she says. “We do believe this platform will continue to grow among this audience and will form a fundamental part of any brand’s strategy for growth.”

A disruptive approach, using digital social trends for visibility is a key strategy for CanO Water, with White saying the company has seen high growth on direct-to-consumer channels in the past 18 months. He attributes this to the brand’s strong digital presence

and people choosing aluminium cans over plastic bottles. “Social media and the digital sphere play an extremely important role for our marketing,” he says. “Everything we put out on social media is in line with current trends because we strive to make water and sustainability accessible and ‘cool’. This is particularly important for a younger generation who are incredibly guided by trending brands and have an extreme care for our planet. We also use our digital platform to build around the product itself to show that CanO Water is a lifestyle brand for consumers to engage with, not just a company that sells water.”

Princes Group is supporting the launch of its Skinny Mixers and Botanicals by working with influencers “a tactic which has been integral to our brand marketing across our portfolio for a number of years”, says Gibson.

A continual focus on disruptive and relevant social media-first partnerships

is a key element of Grenade’s success, says Broughton. “In particular, we’ve recently been working with Tommy Fury, a highly relevant athlete whose name has recently been thrust into the media spotlight following his ongoing exhibition match dispute with social media personality and professional boxer, Jake Paul. In addition, we have an ongoing partnership with Diversity, with Grenade Energy fuelling their recent tour.”

At Wanis, the Tropical Vibes brand was adopted early, and organically, by the UK’s ‘grime’ subculture, explains Phillips. It partnered with one of the ‘godfathers of grime’, Ghetts, to launch one of its new flavours, Kawaii Kiwi. Subsequently, it also collaborated with internet serial dater and creator of ‘Chicken Shop Date’, Amelia Dimoldenberg, just weeks before her ‘date’ with Louis Theroux went viral “with corresponding benefits to the brand”, it says. “[This is] just a

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snapshot, but underlines how social media can play its part and how important it is to have a young and culturally engaged team working on the brand.”

Gen Z, in particular, do react quicker to new products or brands if seen on social media as opposed to more traditional marketing campaigns such as billboards or TV ads, says Get More Vits. However, this year it has actively relied less on influencers or celebrity endorsements to promote the brand and has engaged more with everyday users to encourage real customers with real followers to share their thoughts on the brand.

While recognising that social media plays a key part in driving awareness, Moju says the “growing and well documented challenge within influencer marketing is in market saturation and a growing lack of authenticity as partnerships become more transactional and commercially orientated”. As such, the brand takes a community-led approach, working only with “genuine ambassadors”, which it calls Mo Pros, to help spread the word about its brand.

Sustainability stays top of mind

Carbon neutrality is a goal for many of the soft drinks suppliers featured here, including The Artisan Drinks Co (by 2023) and Belvoir Farm Drinks (by 2030), for example.

For many others, reducing plastics in packaging – along with a variety of other sustainable actions, from water usage to planting trees – is at the forefront of their activity.

Upbeat Drinks’ Cattelani says the company is already carbon-neutral, but adds: “We know that is not enough. There is no planet B, we need to take action now.” The company’s bottles are currently made with 30% recycled PET plastic and are fully recyclable from label to lid, she notes. “Our aim is to have reached 100% recycled PET plastic by 2024, a move currently blocked by the scarce availability of rPET.”

In addition, Upbeat is working towards cleaner oceans with ClimatePartner, its partner for climate action and has partnered with One Tribe to help keep rainforests alive. “For every order placed on our website or through our Amazon store, five plants and 100sq m of forest are saved. So far



we’ve protected 7000+ trees and the number keeps growing,” she says.

At Nichols, Hunt reveals that 100% of the company’s packaging is recyclable and it, too, is trying to reach 100% rPET across its portfolio by 2025, having already removed 120 tonnes(t) of plastic and 17t of aluminium since 2019. “In fact, our UKP products already contain at least 30% rPET, with our squash range containing 51% rPET⁴⁴,” she says.

“In 2022, plastic reduction remains a big focus and there have been some great strides made in the past 12 months by making consistent and considered changes to the way we package our products,” says Clearly Drinks’ Wright. These include substantial investment into recyclable packaging, and lightweighting its 500ml PET bottles. “As a UK-based manufacturer we have an industry leading carbon footprint

of 0.14kg CO₂ per litre. With 95% of all our materials sourced from within the UK and our own spring water source we can keep our miles and impact to the environment to a minimum,” she adds.

Lightweighting bottles has also been “a permanent activity” at Princes Group, which is also ensuring “optimum recyclability” across its range. “Although kerbside collections across some areas of the UK include carton, Princes is hopeful that the current government review⁴⁵ will mean all consumers can eventually recycle their Skinny Mixers and Botanicals packaging,” says Gibson.

Wanis International Foods considers its no-plastic, fully recyclable pack format (glass bottle, steel cap, paper label) to be a key factor in the success of its brands to date, says Manners.

For Belvoir Farm Drinks, on-farm



cans is already 100% recyclable, and all 500ml and smaller bottles sold in GB are made from 100% recycled plastic⁴⁷,” he says. “Earlier this year we began the introduction of new attached caps to our 1.5L bottles, making it easier to collect and recycle all of the plastic used in our products and ensure no cap is left behind. And in September we announced that we’re now rolling out the attached cap design to include our 500ml plastic bottles.

“Even in the face of increasing costs, consumer opinions remain strong,” he adds. “One-quarter of consumers still think retailers and manufacturers should prioritise sustainability despite the rising cost of living, with young people in particular indicating that they will buy products with sustainable packaging regardless of cost⁴⁸.”

Sustainability is a key issue for shoppers and a growing consideration when shopping across categories, agrees Barr Soft Drinks’ Troy. “58% of consumers say that environmental issues are important to them – that’s up 5% from a 2020 study⁴⁹.” In April, the company began roll-out of 100% recycled plastic (rPET) bottles across all 500ml Irn-Bru and Rubicon products and says that 100% of its soft drinks packaging is already recyclable.

As well as having its UK manufactured bottles and cans be 100% recyclable in the UK system, Britvic’s Healthier People, Healthy Planet Strategy features a number of targets on packaging, carbon and water reduction, reveals Parker. “Our business also works in close collaboration with industry peers, government and waste management organisations to improve systems and infrastructure to promote better plastic and metal recovery,” he says. Water stewardship and forestry schemes are also in focus and it has ambitions to achieve a 50% reduction in its greenhouse gas emissions by 2025 and become net zero by 2056.

For CanO Water, sustainability has always been at the forefront of its brand, says White. “Cans are the most recyclable material within beverages and we feel we are using the best on-the-go solution in the market. When we were a start-up, we faced difficulties providing the most sustainable packaging option for our cans (i.e. cardboard outer packaging).

This is because we had very little power to influence our production partners, but as the brand has grown, so has this relationship and the influence we have on our partners, so much so that they are installing a cardboard packaging line into their facilities so that we can finally move away from shrink-wrap outer trays. Therefore, as a brand we are constantly pushing to innovate and create a more sustainable experience.”

Insight from FrieslandCampina’s recent Ingredients Report shows that 65% of the population⁵⁰ believes that food and nutrition brands need to do more to protect the planet, a number that is only set to grow in the coming years, explains Sudall. “Improving the packaging of our products and sustainably sourcing ingredients is a big part of this for us,” she says. Yazoo aims to make all of its packaging recyclable or reusable by 2025, while the company’s 1L packs for Chocomel, recently launched to grocery for the first time, are made from 88% plant-based materials, using FSC-approved cardboard and are also fully recyclable, including the lid.

As a founding member of Circularity Scotland, the administrator for Scotland’s Deposit Return Scheme (DRS) being introduced next summer, Suntory Beverage & Food GB&I is a passionate advocate for DRS, says Mistry. “Following a major study we carried out, involving almost 8,000 people, we found that it takes just seven weeks for most people to rethink their relationship with plastic bottles after living in a DRS society. Our research also showed, that, when asked about their sustainability actions, 50% of people said they take ‘some actions’ towards sustainability but feel they ‘could do more’, which provides a great opportunity for retailers to let their shoppers know why DRS are being introduced and how they can interact with them.”

An eye to the future

Over the past year, the soft drinks industry has endeavoured to navigate the balance of take-home and on-the-go occasions, says Nichols’ Hunt. “As we approach 2023, it will remain important for suppliers to offer a diverse range of formats to meet shoppers’ varying needs and, even more so, to demonstrate value to shoppers in

sustainability is an issue it takes seriously, growing 60 acres of organic elderflowers, “which are the most amazing habitat for small mammals”, says Manners. The company also grows 150 acres of pollen & nectar mix for pollinators and wild bird seed mix for over-wintering small birds. In addition, since 2015, it has established a purpose-built factory, powered by solar panels producing up to 30% of its energy needs. For this year, it aims to increase that by a further 10%.

Moreover, despite the cost-of-living crisis, most believe that consumers are still strongly focused on sustainability issues. A recent survey by CCEP revealed that shoppers’ top sustainability priority for soft drinks is the recyclability of packaging followed by its recycled content⁴⁶, reveals Attock. “Our entire range of plastic bottles and

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the light of the predicted economic downturn.”

Barr Soft Drinks' Troy and Clearly Drinks' Wright agree that financial pressures and inflation will affect shopper behaviour as people seek out value for money. “However, as people look for opportunities to socialise with family and friends, soft drinks will continue to play a key role in these occasions,” says Troy.

Taste will remain the key driver for shoppers, he adds. And, as DRS comes into force in Scotland, sustainability will come to the fore there perhaps more than in other regions.

As wallets are squeezed Upbeat Drinks' Cattelani believes consumers will continue to seek out solutions, that cover more than one need in one purchase. Also, despite the cost-of-living crisis, sustainability will prompt increasing scrutiny of brand claims, with customers having high expectations from suppliers of all sizes, she says.

CanO Water's White says plastic pollution's impact on the environment will continue to influence purchase decisions and points to consumers' growing interest in premium lifestyle brands, while The Artisan Drinks Co's Hinton agrees that high-quality, premium ingredients will be sought after, also noting that individualism in the form of bold, outstanding brands will win the day.

In terms of flavours and ingredients, natural, floral and botanical, as well as added ingredients to boost seasonal wellness, such as ginger, echinacea and honey, will be in demand, says Belvoir Farm Drinks' Manners. However, Purity Soft Drinks' Baldwin says that while consumers are looking to try new and exciting flavour blends, they also appear to be looking for reassurance through more familiar flavours.

Healthier lifestyles and choices are at the forefront of a growing number of consumer minds, says CCEP's Attock. And that extends beyond low- and no-sugar options to incorporate wider health benefits. “That's why categories like performance energy continue to grow at pace,” he says.

While health is the broadest of trends, it pervades consumers' lives in many and varied ways, says Get More Vits. “The Covid-19 pandemic focused



the minds of the global population on the need to stay healthy and a balanced diet of food and drink has a key role to play in this. The soft drinks category is thrown further into the spotlight when this is overlaid with issues such as childhood obesity, the sugar tax and HFSS. It is right that we are focusing on these trends and soft drinks manufacturers can have a positive influence on the health of consumers of all ages in the way they produce and market their brands.”

With consumers becoming more proactive on their health & wellbeing, brands that tap into and extend their functional drinks repertoire are set to thrive. Moju believes this trend will drive functional drinks across vitality/energy, gut health and immunity and will shift into more multi-serve and children's variants. The company also predicts “less sweet, more punchy and sophisticated flavour profiles” will become increasingly popular.

Finally, 2023 will be most noticeable for the sheer level of change, with the category required to readily adapt to inflationary pressures, reductions in disposable income and HFSS legislation, predicts Arla head of beverages Adam Hacking. “However, while there are some challenges ahead, the soft drinks category – and indeed now the RTD coffee sub-category – are of such significant scale and meet a huge breadth of consumer needs,” he says. “We anticipate that this will allow robust performance to remain, in the face of any potential uncertainties.”

Sources

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⁴ Kantar WPO, Total Market, Total Water MAT to 20.03.22
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¹⁷ Nielsen Scantrack, Serve Format, Value % change, w/e 27.08.22
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³⁸ See 13-15
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⁴⁴ At the time of writing, 11.10.22
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- Botanicals, mocktails and mixers**
¹ Kantar, 52 w/e 20.02.22
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- Coffee, milk & more**
ⁱⁱⁱ Nielsen, Value MAT total GB to 18.06.22
^{vi} Kantar, take home: FY 2021
^{viii} Nielsen, Total Coverage, MAT to 01.01.22
^{ix-xi} IRI Infoscan, Total Market Value Sales, 52 w/e 10.09.22 vs YA
- HFSS compliance**
^{xii} Nielsen, Total GB, 4 weeks value, w/e 01.01.22
^{xiii} 30 out of 35 brand ranges will be HFSS-compliant (86% rounded up from 85.7%)

Wanis International Foods

Creating a point of difference

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Tropical Vibes
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Tropical Sun

Founded in 1964, Wanis is now one of the UK's leading importers and distributors of world food and drink brands. "Diversity is the name of the game," says commercial director George Phillips. "Soft drinks are all things to all people and we pride ourselves in having a portfolio of brands that appeal to an incredibly broad consumer base."

Tropical Vibes, a range of hypercolour juice drinks, launched in 2019, is set to achieve retail sales in excess of £11.5m in 2022¹, underlining just how broad the appeal of the formerly niche brand has become, says Phillips. He puts the brand's success down to "a winning combination of exciting flavours, great taste and a real 'point of difference', allied to a good retail price point and fully recyclable packaging, all of which have been embraced by younger consumers and contributed to an early adoption by the UK's grime subculture."

Breaking with convention

Responding to consumer demand, much of it from Tropical Vibes' growing online fan base, the brand's appeal has been further broadened with the recent launch of a new, larger 532ml bottle in the best-selling Fruit Punch, Mango Carrot and Ocean Blue flavours.

Capitalising on the rapidly growing 'cold hot drinks' segment (+29% volume in 2021²) and launched in summer 2022, Moji Ice T! is a brand-new range of naturally flavoured ice tea drinks. "Again, we looked for that point of difference," says Phillips. "Natural ingredients, fun and impactful branding, £1 RSP and fully recyclable glass bottles all deliver a product that is exciting and different from more conventional alternatives." Comprising four popular flavours; peach, mango, lemon and strawberry, this "deliciously light and refreshing drink" is now available to order, he adds.

However, soft drinks need not be all about innovation, with established favourites well capable of holding their own, he says. The Tropical Sun brand of Coconut Water and Aloe Vera drinks has seen significant growth in the



"Variety is the spice of life and that variety can be found under a single roof at Wanis"



past two years. "With volume growth of 80% and 120% respectively versus 2021³, both products underline the need to offer drinks where image perhaps plays second fiddle to perceived health benefits – a reminder to retailers that such products continue to play an important role in their soft drinks offer," says Phillips.

Flavours of the World to your Table

Tropical Sun does not rest on its laurels and, true to its catchphrase 'The Flavours of the World to your Table', its latest launch does just that, he adds. Its brand-new range of high juice drinks in tamarind, sugarcane and lychee flavours is available now.

"With more, equally exotic flavours to follow, Tropical Sun's new range brings a ray of sunshine to consumers looking for something different," he says.

"Variety is the spice of life, and that variety can truly be found under a single roof at Wanis."

Source

- ¹ Internal company data
- ² IRI, Total Convenience 52 w/e 26.12.21
- ³ Internal company data

AQUA Carpatica

Fresh take on natural waters

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AQUA Carpatica Natural Mineral Water
AQUA Carpatica Flavours

➔ Aqua Carpatica boasts a complex portfolio, offering both still and sparkling water, in glass, PET (BPA-free) and 100% rPET bottles, reveals the company. The award-winning range is virtually nitrate-free and has one of the lowest sodium levels of bottled natural mineral waters.

Fifteen different formats suit all consumption occasions: from on-the-go to big volumes for home occasions, and all consumption preferences: still and sparkling, unflavoured and flavoured.

“Consumers treat their bodies like an ecosystem and actively seek solutions that will help them reach their health needs¹,” it says. “The persistent focus on health and hydration is top-of-mind in driving usage of bottled water, so brands like Aqua Carpatica, which lead in terms of health benefits and taste, are set to benefit from this trend.”

Added flavours

In 2022, Aqua Carpatica will be extending its range of premium natural mineral water with Aqua Carpatica Flavours, therefore marking the entry of the brand into the flavoured category, reveals the company. Aqua Carpatica flavours will come in four SKUs, powered by natural mineral water, natural flavours and agave syrup and packaged in 330ml cans: Lime & Mint, Strawberry & Elderflower, Raspberry and Peach & Mango.

The launch will be supported by a multiple touchpoint and multichannel campaign, tracking the customer journey from awareness to purchase, says the company. In recognition of



“The persistent focus on health and hydration is top-of-mind in driving usage of bottled water, so brands like Aqua Carpatica are set to benefit from this trend”

the fact that this is rarely linear, Aqua Carpatica will implement various strategies to capture attention at various touchpoints, but always ensuring it remains customer-centric: from offline campaigns such as print, through online (social media activation), to in-store merchandising.

Natural base

Aqua Carpatica’s core product is its award-winning natural mineral water and all derived items have this as the starting point, thus benefiting from a natural key ingredient that is virtually nitrate-free, low in sodium and rich in electrolytes, explains the company.

“As consumers become more discerning of the impact that less healthy drink choices have on them, they actively seek products to sustain their healthy habits,” it says. “Aqua Carpatica stands out as a brand that supports these healthy choices.”



Source
¹ UK Drinks Brand Overview Market Report 2022, Mintel

DISCOVER THE NEW RANGE

sparkling with flavours



- ✦ Made with natural mineral water
- ✦ Natural flavours ✦ No added sugar

aquacarpatica.co.uk

The Artisan Drinks Co

Breaking with tradition on mixers

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- Amalfi Lime Tonic
- Classic London Tonic
- Pink Citrus Tonic
- Skinny London Tonic
- Violet Blossom Tonic
- Yuzu Tokyo Tonic
- Barrel Smoked Cola
- Bubbly Soda Water
- Fiery Ginger Beer

With countless competitors and copycats, the mixer category is filled with the same flavours that drown out all other taste of the spirit, bland bottles that all look like the market leader, and mixers that are only suitable for gin, says Laurence Hinton, head of marketing at Artisan Drinks.

Not only that, but the spirits world has also changed, he says. "It's not just gin now; it's tequila, mezcal, spiced rums from every corner of the world, vodka, Japanese whiskey, and a huge number of non-alcoholic spirits, growing in popularity every day as attitudes to drinking start to shift.

"We call this mixer-monotony, and it needs to end. Mixers should complement the new generation of spirits while also looking incredible," he notes. "At Artisan Drinks, we understand that the mixer should be a deliberate choice that not only complements the spirit, but also shows the personality of the consumer."



“Mixers need to complement the new generation of spirits while also looking incredible”

In the past year, Artisan Drinks has launched Yuzu Tokyo Tonic, "inspired by one of the world's most vibrant and creative cities", he says. "This oriental fusion combines effervescent yuzu with aromatic black pepper and the warming notes of coriander."

Artisan's drinks don't use any artificial ingredients and all were "born in a bar, not a lab or an office", he adds.

#1 FOR TASTE
OUT OF 83 TONICS

#2 FOR TASTE
OUT OF 83 TONICS

#1 RATED CLASSIC
UNFLAVOURED TONICS

WORLD'S BEST TASTING TONIC



"Great flavours"
"Now my favourite tonic"
"Love the branding"
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*TASTE RATINGS FROM CRAFT GIN CLUB, WITH OVER 130,000 MEMBERS THEY ARE THE WORLD'S LARGEST GIN CLUB

Upbeat Drinks

The all-in-one functional drink solution

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KEY BRANDS

Upbeat Protein Hydration
– Mixed Berry
– Zesty Orange
Upbeat Protein Energy
– Tropical

Launched in July 2022, Upbeat Clear Whey Isolate drinks are already disrupting the soft drinks market with their two new ranges. Upbeat Protein Hydration delivers 10g of Clear Whey Isolate Protein, vitamin B complex, 3000mg BCAA and absolutely zero sugar. Upbeat Protein Energy will power you up with 15g of Clear Whey Isolate Protein, 180mg of caffeine, 4000mg of BCAA and zero sugar.

“With the ‘Everyday Athlete’ at the forefront of our NPD process, we have created a product tailored to emerging market needs: an all-in-one drink solution that combines the benefits of protein shakes, energy drinks and vitamin waters, with an appealing packaging that doesn’t intimidate the mainstream audience,” says Carlotta Cattalani, head of marketing. “We are on a mission to make high-end nutritional technology accessible to everyone looking for a healthier lifestyle. From work to workout, with or without



“We have created a product tailored to emerging market needs”

caffeine, our Upbeat Drinks are the perfect on-the-go choice for everyone looking for that extra protein boost.”

Upbeat Drinks is looking to do good to human and environment alike, she says. “Although a carbon-neutral product, we know we can’t stop here. We support projects that work towards clean oceans, clean drinking water and rainforests and tribes’ protection.”



UPBEAT
RIGHT IN THE MOMENT

**ENERGY
NOW.
PROTEIN
NOW.
HYDRATION
NOW.**

Upbeat drinks combine all the benefits of protein shakes, energy drinks and vitamin waters.

Barr Soft Drinks

Delivering on taste and value

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Rubicon
Strathmore

Source

¹ IRI, Total Marketplace, Value Sales, MAT to 03.09.22
² IRI Marketplace, Value Growth % and Actual, MAT to 25.12.21, Total Coverage
³ AG Barr Sales Data
⁴ JVA Consumer Research, November 2020

Amidst a challenging economic landscape and an ever-changing retail marketplace, soft drinks continues to be one of the most profitable categories for retailers, worth £10.6bn and growing at 10.3% YoY¹.

“As retailers contend with upcoming HFSS regulations, Barr Soft Drinks is perfectly placed to alleviate some of that pressure, with 98% of its range already HFSS-compliant, including Irn-Bru, Irn-Bru Xtra and Rubicon Spring,” says Adrian Troy, marketing director at the company. “This provides retailers with an opportunity to stock a range that’s perfect for every occasion and every shopper, without contending with HFSS guidelines.”

Launched last year, Rubicon Raw is already completely levy-free and HFSS-compliant, allowing retailers to rethink their soft drinks fixture placement



“As innovations in flavour and format evolve, taste remains the key purchase motivator”

and drive incremental sales from the growing energy category, he says.

Over the last year, the Barr Soft Drinks portfolio of brands has delivered an additional £28.2m¹ in retail sales value to the soft drinks category, reveals Troy. Taste continues to be the most important factor in soft drinks purchase decisions, with shoppers increasingly on the lookout

98%

OF OUR RANGE IS
 HFSS COMPLIANT



SOFT DRINKS FOR
 EVERY OCCASION

in a changing marketplace

for new, exciting and refreshing flavour combinations. “As the category evolves, with innovations in flavour and format, everything shows us that taste remains the key purchase motivator,” he notes.

This is illustrated in the energy category, where new flavours have always been particularly important to growing the market, delivering £131m value sales last year alone², he says.

Adding to Rubicon Raw

Earlier this year, Barr Soft Drinks added Rubicon Raw Apple & Guava into the range. Rubicon Raw has already made a significant impact to the energy category, selling more than 20 million cans³, reveals Troy. The top reason consumers like Rubicon Raw is that it’s made with 20% real fruit juice⁴, which, together with caffeine from green coffee beans and



B-vitamins, provides a big energy hit that’s full of flavour, he says.

“Soft drinks and energy are increasingly busy categories, with lots of innovation to choose from,” adds Troy. “Shoppers will always be looking for great-quality soft drinks

from brands they know and trust, but great value is now also at the forefront of their minds. Shoppers know that our brands deliver on taste and value for money, which will be a key influencer when making a soft drinks purchase.

“Brands with proven flavour and taste credentials, like Rubicon Spring and Sparkling and Irn-Bru, known for their iconic flavours and exotic fruitiness, are more valuable than ever for retailers. And at a time when choosing what products to stock where is becoming more of a challenge, Barr Soft Drinks’ wide range of HFSS-compliant soft drinks can help retailers to continue driving incremental sales.

“There is a real opportunity to tap into this growing category with a range of flavours and formats on display, that cater for every shopper in the lead up to Christmas and beyond,” he concludes.



Belvoir Farm Drinks

Inspiration from nature

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KEY PRODUCTS

Adult Soft Drinks
 Cordial
 Mixers
 Non-Alcoholic Cocktails
 Winter Seasonal Range

Belvoir Farm is a proudly independent, family-run business, passionate about celebrating nature in all its real, imperfect and dramatic glory, and our drinks reflect this, says the company. “We source real, natural ingredients, and never use artificial preservatives, flavourings, colourings or sweeteners,” it notes. “We still use very simple techniques to maintain the integrity and taste of our ingredients – one example being our elderflower; after picking from the local area or from our 60-acre organic plantations, we infuse it with water, sugar and lemon and citric acid, just like homemade. We then use modern bottling techniques and automated packing to fill and label the product, but the artisanal nature of the recipe production remains.”

Now, with over 40 different drinks that are shipped UK-wide and across the world, Belvoir Farm often looks towards the seasons for its ingredient inspiration, whether that be summer punch or lemonades when it’s warm, or mulled ginger and berry punch mixes when it’s cold, it says. “However, despite a monumental surge in production demands, little has changed in terms of how we make our drinks and, to this day, the company still follows the original elderflower cordial recipe created by Mary Manners back in 1984. From selling just over 1,000 bottles to local food stores and farm shops in its first year, it now produces 20 million bottles annually.”

Belvoir Farm is the proud winner of The Grocer Gold Award for Soft Drinks Brand of the Year 2022. The company



“We still use very simple techniques to maintain the integrity and taste of our ingredients”

has introduced a raft of new products this year, including Botanical Sodas, launched in March, which have less than 4.5g of sugar and 20 calories per 100ml, so are HFSS-compliant. The range of three drinks delivers interesting flavour profiles: Spicy Ginger Fizz, Floral Fizz and Bitter Orange Spritz.

Lime & Yuzu Mojito, launching in October, is the fourth non-alcoholic cocktail to join the brand’s range. Also, Best of British, launched in May, saw the brand’s iconic elderflower sparkling and cordial re-bottled in a limited-edition design to mark the Queen’s Platinum Jubilee.

Belvoir Farm also launched its first TV ad this year. “Our ‘Welcome to our Wild’ advertising campaign was born out of the natural ingredients used in our products and also the 2,500-acre farm around us,” it says. “The company is as passionate about looking after surrounding wildlife and nature as it is about the natural ingredients in its drinks.

“Our expertise in creating premium soft drinks with nature and sustainability at the heart of everything we do, plus ingredient transparency and integrity with nothing artificial, makes our brand stand out from the crowd.”



Belvoir Farm

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Britvic Soft Drinks

A healthy dose of innovation

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KEY BRANDS

Drench
 J2O
 Lipton
 Pepsi
 Pepsi MAX
 Purdy's
 Robinsons
 Rockstar
 Tango
 7UP

“This year, we have continued to excite and engage our shoppers across our soft drinks portfolio of well-known and loved brands,” says Ben Parker, retail commercial director at Britvic. “With consumers looking towards healthier options and upcoming HFSS legislation coming into force, our innovation pipeline has been centred around low- and no-sugar products that meet HFSS regulation-limiting promotions, and offer consumers better-for-you options as part of our ‘Healthier People, Healthier Planet’ strategy. Our leading approach to low- and no-sugar reformulations has resulted in 90% of our portfolio – 196 liquids – already being HFSS-compliant¹, all while maintaining our commitment to never compromising on taste.”

Sugar-free NPD

The company has innovated within sugar-free flavours across its Tango portfolio, reveals Parker. “Most recently, we launched Tango Apple Sugar Free, following the success of Tango Berry Peachy Sugar Free, the No.1 fruit-flavoured carbonate NPD in 2022²,” he says. “The Tango brand has doubled in size in the last five years, becoming the third-largest brand in the fruit-flavoured carbonates category in the latest 12 weeks data³. Now worth over £65.5m⁴, Tango is well placed to continue its growth through sugar-free flavours, which currently deliver almost £28m (+63% vs last year) in value sales⁵.

“As we head into Christmas, our J2O



“With consumers looking towards healthier options and HFSS legislation coming into force, our innovation pipeline has been centred around low- and no-sugar products”

Glitterberry edition will be returning to shelves and is a great alternative to alcohol, while encouraging shoppers to trade up over the festive period. The festive blend of grape, cherry and winter spices with edible gold glitter is perfect for adding some sparkle to any drinks occasion this Christmas.”

From POS to partnerships to TV campaigns, Britvic understands it’s important to continue brand momentum beyond innovation, with an ongoing support plan, adds Parker.

This year Robinsons drove awareness and engagement for the brand, celebrating a summer of fun with its £1.5m ‘Big Fruit Hunt’ campaign. “This was centred around a digital AR fruit hunt, encouraging families to flavour their water bottles,” he says. “A QR Code, featured on-pack, took shoppers to an interactive map to find virtual fruit to fill a water bottle and collect prizes. The unmissable campaign was supported by out-of-home, point-of-sale, digital and social activations.

“Robinsons Ready to Drink also announced itself as the official soft drinks partner for The Hundred cricket tournament as part of a three-year deal. This included an on-pack promotion giving consumers the chance to win tickets to the tournament every two weeks via a QR code. Alongside in-store activations, the partnership supported retailers in driving sales this summer.”

Source

¹ 90% compliant stat based on % Britvic GB products that are HFSS-compliant vs total portfolio
² Nielsen IQ RMS, Total Coverage, Value Sales, Fruit Flavoured Carbonates, Britvic Defined, YTD 2022 to 24.09.22
³ Nielsen IQ RMS, Fruit Carbonates Britvic Defined, Total Coverage, Value Sales, Latest 12 wks to 24.09.22
⁴ Nielsen IQ RMS, Total Coverage, Value Sales, Fruit Flavoured Carbonates, Britvic Defined, MAT to 24.09.22
⁵ Nielsen IQ RMS, Total Coverage, Value % Chg vs YA, Fruit Flavoured Carbonates, Britvic Defined, MAT to 24.09.22





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*NielsenIQ RMS, Total Coverage, Britvic Defined Adult Soft Drinks, Value and Volume sales, 8 weeks to w.e 01/01/22



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CanO Water

Why the future is CanO Water

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KEY BRANDS

CanO Water

↙ Pioneering canned water brand CanO Water continues to grow, propelled by disruptive marketing and increasing consumer demand for more sustainable alternatives to plastic bottled water, says the company.

“In a highly competitive and crowded sector, CanO Water often goes against the grain, defying market norms to uphold itself as the UK’s leading challenger water brand,” says co-founder and marketing director Josh White. “Not doing everything by the book – and the antithesis to what’s expected – has helped us stand out from the crowd. Our 2022 marketing focus on music, sport and socialising channels has enabled us to reach an audience who, likewise, are fuelled by purpose and passion.

“Guided by a cultural landscape and emerging social trends, CanO Water is now, not just a product, but has transitioned into a popular lifestyle brand,” he adds.

Brand awareness is key

CanO Water aims to secure memorable ‘can in hand’ moments to build awareness, engagement and ultimate brand loyalty, says White. “Brand awareness has been the main objective over the past year,” he notes. “We are trying to get as many eyeballs on the brand as possible – whether that be in your local retailer, the office canteen, at your favourite festival or even on your TikTok feed.”

CanO Water has seen over 30m impressions across social channels since April 2022, with content engagement rates that surpass industry



“Not doing everything by the book – and the antithesis to what’s expected – has helped us stand out from the crowd”

benchmarks, reflecting captivating online experiences and the building of a wider movement, reveals White. “CanO Water is here to stay,” he says.

CanO Water is often the chosen water brand for an impressive array of large cultural gatherings including London Fashion Week, Global’s Summertime Ball and the F1, to name a few, with various celebrity endorsements elevating the brand name, adds White. “We are forever grateful to the retailers that have stayed loyal since day one and continue to support CanO Water’s journey,” he says.

Purpose and authenticity come first

“As the UK’s first canned water brand, having never sold a plastic bottle, we are proud of the brand’s authenticity and progression, and are excited to take on 2023 with full force.

“Over the past seven years we’ve taken into consideration feedback from both customers and retailers on our can functionality, branding and more. And we are buzzing to announce what we’ve got planned for 2023. Although we can’t disclose details, you won’t want to miss this – so be sure to ride this next wave with us.”

As confirmed by Steven Bartlett on GQ, CanO Water is the future and definitely one to watch.

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*Top 25 companies in UK plain water market, Zenith Water Report 2020-21

Clearly Drinks

It's all Perfectly Clear

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Perfectly Clear
Upstream
Northumbria Spring
Revolution Waves

Consumers want to purchase healthy products to support their general wellbeing. But they also want to indulge and enjoy full flavoured tasty products, says Clearly Drinks marketing and strategy director Susanne Wright. This tension is particularly high with families, five million of whom buy flavoured water¹ and for whom limiting sugar consumption is the primary consumer health concern².

“Families prefer fruitier products with full flavour,” she says. “Other flavoured water brands offer a subtle infusion of flavour but these risk being rejected in favour of sugary alternatives, due to lack of flavour.”

According to Wright, the solution is Perfectly Clear – the only brand in the category that provides relief from this growing consumer tension and the perfect balance of health and taste, she says. “It’s packed with natural fruity ingredients while also being sugar-free and with only 1 calorie per 100ml. Perfectly Clear is the original flavoured water brand and is bottled at source from our own Northumbria spring, for the freshest, purest taste.

“That is why Perfectly Clear is continuing to drive the flavoured water category with significant growth. As the second-biggest brand in the flavoured water category³, Perfectly Clear is at the forefront of category growth, up 44% YOY⁴ and bringing in 382,000 new buyers into the category (a 172% increase)⁵.

“As a responsible manufacturer, it’s our job to forge the path in what’s possible,” adds Wright. “Championing sustainability in the sector is part of



“Families prefer fruitier products with full flavour. Other flavoured water brands offer a subtle infusion of flavour but risk being rejected in favour of sugary alternatives due to lack of flavour”

who we are as a company and everyone across the business is invested in making these promises a reality, to make our planet a better place. We are passionate about helping our environment prosper. Our UK-based spring means we aren’t transporting water over water and have an industry-leading 0.14kg CO₂ per litre (the industry standard is 4 times higher). We are carbon-neutral on our own operations and have a plan to reach net zero by 2035. We are passionate about helping our consumers reduce, reuse and recycle. All of our packaging is 100% recyclable and we send zero waste to landfill.”

In 2023 Clearly Drinks and Perfectly Clear will continue to be at the forefront of sustainability and innovation, says Wright. Two new flavours are launching in spring 2023 – blueberry and apple and cherries and berries, he reveals. There will also be a brand new packaging refresh, a new 1.5L bottle and new formats to appeal to a wide range of shoppers. A new six-pack will also offer value for and efficiencies for convenience retailers.

In addition, Clearly Drinks will continue to support the Perfectly Clear brand and drive new shoppers into the category with above-the-line marketing including digital, sampling and outdoor as well as social and influencer activity.



Source

¹ Nielsen, project households demographics 52 w/e 17.07.22

² Nielsen, UK State of the Nation 2022, June 2022

³ NielsenIQ, unit sales 52 w/e 30.07.22

⁴ NielsenIQ, value sales 52 w/e 30.07.22

⁵ Nielsen, penetration YOY growth 52 w/e 17.07.22



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Coca-Cola Europacific Partners

Driving category growth

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Coca-Cola original taste
Coca-Cola zero sugar
Diet Coke
Fanta
Dr Pepper
Sprite
Lilt
Schweppes
Powerade
Costa Coffee RTD
Oasis
Capri-Sun
Glaceau Smartwater
Monster Energy
Relentless
Reign Total Body Fuel

↙ Coca-Cola Europacific Partners' (CCEP's) brand portfolio has played a key role in driving soft drinks volume and value growth over the last year in retail, with three of its leading brands featured in the top 10 delivering the most value across total FMCG¹.

Coca-Cola remains the No.1 soft drinks brand in GB², Fanta is the No.1 flavoured carbonates brand³, and Schweppes is the nation's favourite mixer brand⁴, recognised by 76% of Brits⁵, says the company. Within the Coca-Cola trademark, Coca-Cola Zero Sugar is maintaining its position as GB's fastest-growing major cola brand, up nearly 20%⁶ in the last 12 months.

And, from a format perspective, on-the-go and sharing formats across the CCEP portfolio both continue to grow⁷, demonstrating that at-home occasions remain important post-Covid, even with more people out and about enjoying on-the-go refreshment, it says.

Sugar reduction journey

"With HFSS regulations now in place, the success of CCEP's sugar reduction journey over recent years puts us in a strong position to help retailers keep driving impulse sales from high footfall locations in stores – but we remain committed to offering shoppers choice on the main fixture, with favourites like Coca-Cola Original Taste and Monster Green," says the company.

"Coca-Cola Zero Sugar is among the HFSS-compliant brands that make up 86% of the CCEP portfolio⁸, alongside other shopper favourites like Fanta, Sprite, Capri-Sun, Oasis, Monster Ultra – the No.1 zero sugar energy drinks brand in GB⁹ – and Costa Coffee RTD, which is growing at almost three times the rate of the RTD coffee segment¹⁰."

Sustainability

Packaging innovation is another key focus for CCEP as it works towards a circular economy, it reveals. This year, CCEP became the first major soft drinks provider in GB to introduce attached caps to 1.5L and 500ml plastic bottles that stay connected to the bottle after it's opened, which will help improve recycling rates and prevent waste*.



“The success of CCEP's sugar reduction journey means 86% of its portfolio is exempt from HFSS, putting it in a strong position to help retailers keep driving impulse sales from high footfall locations in stores”

All CCEP bottles and cans are 100% recyclable, and its 500ml bottles are now made from 100% recycled plastic¹¹.

NPD & marketing

2022 has been another busy year for NPD, with the launch of a third mystery #WhatTheFanta flavour, Costa's RTD Frappé range and Big Latte sharing format and, as always, great-tasting new variants from the Monster and Relentless energy drinks brands, it says.

The first limited editions under the new Coca-Cola Creations platform have also successfully recruited new shoppers; 27% of shoppers who bought into the first edition – Coca-Cola Zero Sugar Intergalactic – were new to the Coca-Cola Zero Sugar brand¹².

Meanwhile, the 2022 marketing plan has been just as busy, with highlights including Diet Coke's 40th birthday collaboration with Kate Moss, a gaming-led on-pack promotion for Coca-Cola Zero Sugar, and the launch of the Coke Studio music platform.

Coming up, as well as a raft of activity in its capacity as Official Soft Drinks Partner of FIFA World Cup 2022TM, Coca-Cola will bring back its festive packs, complete with a new on-pack promotion and complemented by its iconic Christmas advertising. And, as always, Schweppes will be getting into the festive spirit as well.



Source

¹ Nielsen, Total GB incl. discounters, Value MAT 11.06.22
^{2,3} Nielsen, Total GB incl. discounters, Value MAT w/e 18.06.22
⁴ Nielsen, Total Cov, MAT Volume w/e 18.06.22/CGA MAT Volume w/e 19.07.22
⁵ Kantar Worldpanel, February 2022
^{6,7} Nielsen, Total GB incl. discounters, Value MAT w/e 18.06.22
⁸ 30 out of 35 brand ranges will be HFSS-compliant – 86% (rounded up from 85.7%)
⁹ Nielsen, Total GB incl. discounters, Volume MAT w/e 18.06.22
¹⁰ Nielsen, Value MAT total GB to 18.06.22
¹¹ Excluding labels and caps
¹² Kantar: Take Home Purchasing – 1 Year Continuous panel – Data until May 2022 (4-week snapshot)
* Switch to attached caps across all formats due to be completed by the end of 2024

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Coca-Cola Europacific Partners – Monster Energy Co.

Stimulating energy drinks

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KEY BRANDS

Monster Energy
Relentless
Reign Total Body Fuel

↙ The Monster brand has taken a leading role in evolving the energy drinks sector in recent years, becoming the No.1 deliverer of value growth in the entire soft drinks category¹, says manufacturer and distributor CCEP. An extra £80m² worth of sales in the past year has taken the value of the Monster brand to more than £455m, helping grow the energy drinks sector to £1.6bn³, it says.

“When energy drinks first hit the market in GB back in the 1990s, only a handful of products were available, all with a similar taste profile,” notes the company. “But in recent years, led by Monster, the sector has diversified heavily, to offer a variety of flavours, juice blends and functional benefits, that have helped to make energy drinks a mainstream choice for shoppers.”

Monster benefits from a strong core offer and also from the more recently launched Ultra and Juiced ranges, it says. “Monster Juiced offers full flavoured energy with personality and is the fastest growing Monster range⁴. HFSS-compliant Monster Ultra is the No.1 zero sugar energy brand in GB⁵, up 36%⁶, offering consumers a lighter energy option, with fresh flavours appealing to a more female audience.” The range is expanding all the time with recently launched Monster Ultra Watermelon and pineapple-flavoured Monster Ultra Gold clocking up over £12m⁷ in sales since earlier this year.

“Great-tasting innovation doesn’t stop there,” it adds. “Watermelon and pineapple flavours will both soon feature in the core range; Monster



“An extra £80m² worth of sales in the past year has taken the value of the Monster brand to more than £455m, helping to grow the energy drinks sector to £1.6bn³”

Reserve White Pineapple is hitting shelves this autumn, and Monster Reserve Watermelon is coming in early 2023. Innovation across the portfolio continues to give shoppers choice.”

Monster has also become relevant on more occasions, adds CCEP. “Five years ago, shoppers tended to buy energy drinks in single cans while on the move, but that’s evolved, driven in part by the lifestyle changes brought about by the pandemic, with more at-home consumption during occasions like studying, relaxing or gaming,” it says.

“While sales of Monster single cans continue to grow, Monster take-home multipacks have added over £75m⁸ in value and are growing faster than multipacks from any other brand in the energy segment (21.5%⁹).”

Monster’s high-profile marketing and promotions always come with opportunities for retailers to activate in-store, such as its current Apex Legends on-pack activity, notes CCEP.

Meanwhile, Relentless, also part of the Monster Energy Co. portfolio, has taken ownership of the music scene, linking to artists like Aitch, and Reign Total Body Fuel taps into shopper demand for products to help achieve maximum results while training.

As it celebrates its 20th birthday this year, the Monster brand has seen a strong performance, with more exciting campaigns and innovation yet to come.



Source

¹⁻⁶ Nielsen Total GB incl dis MAT Val to 18.06.22
⁷ Nielsen, Total Coverage, MAT to 10.09.22
^{8,9} Nielsen Total GB incl dis MAT Val to 18.06.22



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CRC Innovations (Scotland) Ltd

Sour brand extension to hit UK

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Toxic Waste®

↙ Candy Dynamics Inc, based in Carmel, Indiana, a suburb of Indianapolis, was established in 2006 as an innovator of sour candies. Its flagship product, Toxic Waste, Hazardously Sour Candy, is a phenomenally popular, one-of-a-kind, double-action sour hard candy treat that has become a hit with candy lovers of all ages worldwide, says the company.

Toxic Waste candy can be purchased throughout all of the USA and across international markets including the UK, Europe (distributed by Newbridge Confectionery), Australia, South Africa, Canada, Brazil, New Zealand and the UAE.

Now, CRC Innovations (Scotland) Ltd, the branding and licensing arm of wholesaler, distributor, importer and brand owner Southeast Traders Ltd, is planning a line of Toxic Waste fizzy soda drinks, ice creams and ice lollies for the UK market. Both the frozen and the drinks lines will use packaging inspired by the brand's vibrant, bold and distinctive style, including the well-known Toxic Waste drum and the Mr Toxie Head character.

Toxic Waste fizzy sodas

Due to be launched in early 2023, CRC Innovations (Scotland) Ltd has developed a range of fizzy sodas to capture the flavours and sourness



“CRC Innovations (Scotland) Ltd is planning a line of Toxic Waste fizzy soda drinks, ice creams and ice lollies for the UK market”

of the Toxic Waste brand. The sugar-free, fizzy soda cans will be available in three flavours – Blue Raspberry, Apple, and Lemon & Lime – and hit the ‘Tangy’ level on the Toxic Sour Meter, reveals the company.

Other products

CRC Innovations (Scotland) Ltd has also finalised a frozen range of Toxic Waste branded products that include ice lollies with a sour slime centre and ice cream tubs in the style of the Toxic Waste drum.

To complement the ice cream there are two sour syrups in Apple and Lemon flavour, which can also be used to give pancakes and waffles a taste of Toxic Waste.

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For sales enquiries contact 01236 730000
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Fentimans

From botanical to bottle

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KEY BRANDS

Fentimans

After more than 100 years of botanical brewing, Fentimans is proud to still be owned by a member of the Fentiman family, the great-grandson of Thomas Fentiman. In 1905, Thomas Fentiman was approached by a fellow tradesman for a loan. A deal was struck and a recipe for botanically brewed ginger beer was provided as security. The loan was never repaid so Thomas became the owner of the unique recipe and began selling it door-to-door. “We are still just as passionate about producing the rich depth of flavour he produced back then, which is why the unique seven-day brewing process has been handed down from generation to generation within the Fentimans family and is still the basis of our botanical process today,” says the company.

While originally founded in Cleckheaton, England, the botanical ingredients used to create Fentimans’ distinct flavours come from all around the world including Asia, Europe and the USA. Using these high-quality ingredients is at the very core of the drinks the company produces. “The flavours team at Fentimans, who are experienced experts in creating the distinct Fentimans taste their customers love, source ginger root from farms in China and rose oil from Bulgaria’s famous valley of roses, reveals the company. “It’s only when they have those top-quality natural ingredients that Fentimans can begin the botanical brewing process, of which the first step is extraction, before a seven-day fermentation period; a process that can never be rushed to ensure optimum taste.”



“The flavours team at Fentimans source ginger root from farms in China and rose oil from Bulgaria’s famous valley of the roses”

Developing new flavours

It has certainly been a challenging year, but Fentimans has continued with new botanical flavour development, and has launched new products for consumers to enjoy.

Most recently, Fentimans introduced the latest range in its soft drinks category, Good & Fruity. Designed to meet the needs of the growing number of consumers seeking a healthier lifestyle, the Fentimans Good & Fruity range packs 35% real fruit juice, as well as essential vitamins calcium, zinc and Vitamin B6 to support digestion and metabolism, and comes in a range of flavours including Lemon & Pink Ginger and Cherry & Blood Orange. Consumers can purchase the Good & Fruity range in Tesco as of this month.

Understanding the market

When it comes to developing new botanical flavours, Fentimans makes it a priority to keep its customers at the forefront of that process, explains the company. “It’s for that reason, along with helping our customers understand consumers’ buying habits, that we run our annual Fentimans Market Report.”

This year’s report, due to be released in November, looks at trends for the upcoming 12 months. It can be accessed on www.fentimans.com.

The UK's second largest premium carbonated soft drinks brand*

ESTD



1905

Full of
botanical
flavour



*Reference: CGA 52 weeks ending 18/06/2022

FrieslandCampina

Coffee and shake to go

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KEY BRANDS

YAZOO
Chocomel
Barista

Cold coffee has had a strong couple of years within grocery & impulse, up 28% year-on-year¹ in the UK. “Consumers are now much more aware of cold coffee,” states Gabriella Sudall, marketing manager NPD at FrieslandCampina UK, who looks after the Chocomel and Barista brands. “Stocking a variety of ready-to-drink (RTD) coffees, such as our newcomer, Barista, is a must for retailers, especially those near transport hubs.”

Caffeine on the move

“More of us are out and about for work and leisure, so we do expect sales of on-the-go drinks such as milkshakes and cold coffees to continue to perform well in the months ahead,” she notes. “While we see strong growth year-round for our Barista coffee cans, we certainly see a spike in the summer months, when shoppers still want that caffeine hit but in a colder format.

“Since launching in 2019, Barista has focused on the convenience channel and is available in three variations: Caffè Latte, Caramel Latte and Double Shot Espresso,” explains Sudall. “It is now a £1.7m brand², and is the fastest-selling RTD coffee³.

“A key part of Barista’s success is its competitive £1 price point – big news in a category dominated by pricier brands,” she adds. “This acts as a trial mechanic into the category for those put off by the higher price point of other brands or coffee shop offerings, but who still want a great-tasting pick-me-up.

“Barista therefore really stands out on-shelf, and we suggest merchandising



“A key part of Barista’s success is its competitive £1 price point – big news in a category dominated by pricier brands”

it alongside other chilled coffee brands to give more breadth of options, as well as near other food-to-go products. With budgets likely to tighten in the year ahead, there is scope to introduce Barista to the grocery channel as well.”

Chocomel

“Another innovation that is already a hit in the UK market is Chocomel,” adds Sudall. “This premium chocolate drink is now a £7.4m brand in the UK since launching in 2019⁴.

“Chocomel has captured UK shoppers’ imagination with its great taste and vibrant branding. The entire flavoured milks category has been supported by the trend for premiumisation in flavoured milks. Chocomel and the wider category’s success over the last year shows people are happy to pay more for indulgence that doesn’t break the bank. Premium milk drinks are a growing trend in flavoured milk, up 29% year-on-year⁵.

“Chocomel is also versatile, enjoyable as an ice-cold refreshment in the summer months or consumed warm with a whipped cream topping as a comforting treat in the winter. This variety has massive shopper appeal that drives repeat purchase.”



Source

- ¹ IRI Infoscán, Total Market, Value Sales, Flavoured Milk, 52 w/e 18.06.22
- ² IRI Infoscán, Total Market, Value Sales, non-coffee & non-protein flavoured milks with PPL >£3, 52 w/e 10.09.22
- ³ IRI Plussuite EPOS Sig All Scan Snack Outlets CWD WTD Unit RoS, 12 w/e 13.08.22
- ⁴ IRI Plussuite EPOS Sig All Scan Snack Outlets, 52 w/e 10.09.22
- ⁵ IRI Infoscán, Total Market, Value Sales, non-coffee & non-protein flavoured milks with PPL >£3, 52 w/e 10.09.22

BARISTA BOOSTS YOUR MARGINS



STOCK UP NOW

Get More Vits

Boosting consumers' health

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KEY BRANDS

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Get More Vits Kids Drinks
Get More Vits Recovery
Get More Vits Multivitamin
Chewing Gum
Get More Vits Supplements

Get More Vits makes a range of delicious and healthy drinks to help consumers and their families stay healthy at home and on-the-go, reveals the company. "As the UK continues to emerge out of the Covid-19 shadow, health has clearly remained a constant in consumers' minds as sales for the brand have surged across both larger, take-home pack formats and more convenient single serve," it says.

"After a record-breaking summer, which consolidated its position as the No.1 vitamin drink brand in the UK¹, September saw Get More Vits advance even further with its biggest-ever month in over nine years of trading. This has demonstrated the brand's breadth of appeal, not only as a tasty soft drink that quenches the thirst in the warm summer months, but also one that attracts consumers beyond this core trading period as an easy and convenient way to stay healthy as the weather turns colder and sunshine hours fall away."

Taste has always been at the heart of Get More Vits, with co-founders Chris Arrigoni and Steve Norris believing a soft drink must first and foremost be refreshing and enjoyable. However, meeting consumers' developing health needs has also driven the brand's recent NPD. Inspired by the stellar performance of its top-selling Get More Vit D – containing the 10 micrograms of Vitamin D that Public Health England recommends consumers of all ages take daily – the team have developed Vitamin B12 and Fibre drinks.

"Delicious Pink Grapefruit Vitamin B12 uniquely provides the essential vitamin that vegetarians and vegans often lack, since its main source is animal produce – meat, fish and dairy," says the company. "Plus, with average daily fibre consumption in the UK at 18g, while the recommended amount is 30g, our Fibre drink, which contains 6g per bottle, provides an easy convenient way to keep levels topped up," it says.

Underpinned by natural fruit flavours, spring water and impactful packaging, Get More Vits offers the right amount of specific vitamins and explains to consumers why it's good for them. "Having launched



“Inspired by the stellar performance of its Get More Vit D, the team have developed Vitamin B12 and Fibre drinks”

a comprehensive Get More Vits Healthcare range over the last 12 months – vitamin supplements, effervescent tablets, sprays and chewing gum – the brand's health credentials have been enhanced beyond soft drinks and we now offer a unique proposition in the market," it says. "As well as driving overall brand awareness and credibility, this can also help educate consumers on the benefits of staying healthy all year round."

The team are also keen to develop the company's ESG strategy, central to which resides a commitment to remove, reduce, reuse and recycle plastics. "Get More Vits now offers a growing range of products in sleek 330ml cans, and we have switched to 30% recycled plastic in our bottles. Also, we will improve the recyclability of our bottles with a new design sleeve in Q1 2023, which enhances on-shelf appeal and – more importantly – contains nearly half the ink of the current design."

Source

¹ Nielsen ScanTrack, Total Coverage, 52 weeks to 24.09.22

GET more[®] ViTS

The UK's Number 1 Selling Vitamin Drink*



[getmorevits.com](https://www.getmorevits.com)

For samples, please email hello@getmorevits.com

Grenade

Fuelling soft drink innovation

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KEY BRANDS

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Grenade Protein Bar
Grenade Energy

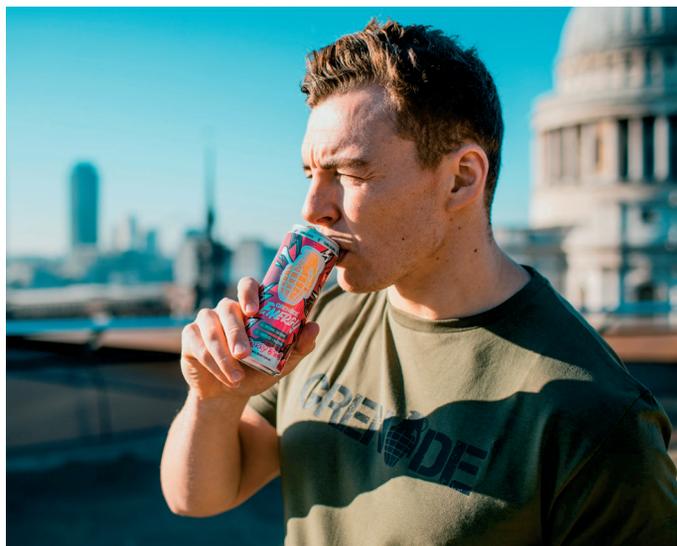
Following the pandemic, six in 10 people have made positive lifestyle changes, eating better and exercising more¹, reveals Grenade.

Critical in aiding many people's newfound fitness regimes are energy drinks, with their caffeine content serving to boost performance during workouts, sporting activity or to get through a hectic day. But not all energy drinks are created equally. Those with low-sugar and zero-calorie credentials are proving popular, as they make it easier for increasing numbers of health-conscious people to keep their calorie intake in-check, it says.

Also figuring highly for active adults are energy drinks which go above and beyond, offering added functional benefits for an even bigger boost. Grenade Energy is a prime example, notes general manager (drinks) Dan Broughton. "Not only is the caffeine within each can (equivalent to two espressos) derived from coffee beans, it also contains a host of vitamins, electrolytes and BCAAs, with the entire range being sugar free and zero calorie.

"With Grenade Energy ticking the pre-workout box, Grenade's Protein Shakes have become the perfect post-workout solution, with sales now well in excess of pre-Covid levels²," he adds. "Developed following the runaway success of Grenade's best-selling protein bars³, Grenade's Protein Shakes offer consumers a healthier alternative to traditional breakfast drinks that tend to source a lot of their calories from sugar. Understanding that low sugar credentials are within the top five health needs driving health choices⁴, Grenade's shakes also pack 25g of protein and come in six delicious flavours. This makes consuming protein much easier for time-poor consumers who are also now much more knowledgeable about the importance of this macronutrient, essential in helping to repair and rebuild muscle mass after exercise."

With so many options, navigating the soft drinks market can be a minefield for consumers, says Broughton. In particular, research shows that while 62% of people review a product's



“Not all energy drinks are created equally. Proving popular are those with low-sugar and zero-calorie credentials”

ingredient list, more than half use front-of-pack labelling as a source of information⁵. "So, Grenade recently updated its protein shakes and energy drinks packaging, ensuring that natural caffeine, high protein and low sugar claims are clearer than ever and making it easier for shoppers to find what they're looking for," he says.

Retailers should also place healthier alternatives in prominent store locations, with impactful POS to grab customers' attention, adds Broughton. "If space is limited retailers should make the most of their chillers, situated near the counter, to turn waiting time into buying time – especially as shoppers are more likely to buy drinks for immediate consumption if chilled⁶."

"Grenade's heritage in sports nutrition means our core product lines are often consumed by elite athletes and sports clubs. Never before have consumers had such ready access to the same drinks their favourite players are consuming."

Source

- 1 Market Measures, Covid Recovery Tracker, January 2021
- 2 IRI Marketplace, Total UK Market Value Share Protein Bars, Grenade Protein Bars, Category Brand Level, 52 w/e 07.08.22
- 3 IRI Marketplace, Total UK Market Value Share Protein Bars, Grenade Protein Bars, Category Brand Level 52 w/e 07.08.22
- 4 Kantar, 53 w/e 21.02.21
- 5 International Food Information Council, Consumer Perspective on Food Ingredients, June 2021
- 6 Lumina Intelligence Convenience Tracking Programme, Q1 2020 to end of March

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**UK'S NO.1 PROTEIN
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**HFSS
COMPLIANT**

GRENADE
HIGH PROTEIN, LOW SUGAR

*IRI data ending 15th May 2022, based on value share of Protein Shakes 52 w/e - convenience channel

MOJU

Adding a natural boost

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KEY BRANDS

MOJU Ginger Shot
– 60ml shot and 420ml dosing bottle
MOJU Turmeric Shot
– 60ml shot and 420ml dosing bottle
MOJU Hot Shot
– 60ml shot
MOJU Vitamin D Shot
– 60ml shot and 420ml dosing bottle
MOJU Vitamin C Shot
– 60ml shot and 420ml dosing bottle
MOJU Prebiotic Shot
– 60ml shot and 420ml dosing bottle

Moju is the UK's fastest-growing soft drinks brand, with retail sales currently up 142%¹, says the company. Moju leads and continues to grow the functional shots category with 53% market share and is driving 97% of its growth². In addition, the brand is driving 10% (£4.5m) of growth in the total juices & smoothies sector³.

Growth drivers

With 95% of Moju's sales incremental to soft drinks, the brand's role is clearly as a functional health-led, not refreshment-led choice for shoppers, it says. 69% of consumers now claim to be proactively leading a healthy lifestyle⁴, so the concept of 'proactive health' is now a mainstream trend and remains a priority for consumers⁵. However, retailers are yet to fully meet consumers needs in this space, with 58% of consumers wanting to see more healthier drinks available⁶ in-store.

Sugar is a big challenge in juices & smoothies, with 55% of consumers reducing their intake in the past year⁷, adds Moju. However, offering lower and no sugar alone is not enough to meet the needs of today's consumers – they are looking for more natural, nutritious and function-forward options that support their active and busy lifestyles.

"In a category filled with compromise, Moju offers a range of natural, hyper-convenient functional shots, packed with fresh pressed nutrients straight from the source. They are naturally low in sugar and calories and contain no artificial ingredients or preservatives, while being 100% plant-based and HFSS-compliant," explains Rich Goldsmith, Moju CEO and co-founder.



“The concept of ‘proactive health’ is now a mainstream trend and remains a priority for consumers⁵”

Moju's range is based on three pillars: vitality, gut health and immunity, he says. For vitality, its Ginger Shot and Turmeric Shot offer naturally energising, caffeine-free alternatives for consumers looking for healthier alternatives to coffee, classic energy drinks or smoothies.

In early 2022, the company also launched its new 'Hot Shot' variant, designed to offer a more accessible alternative to its potent Ginger Shot.

Targeting gut health, Moju's Prebiotic Shot, in raspberry flavour and launched in 2021, is now listed in Waitrose, Asda, Ocado and WHSmith, with a Tropical variant introduced in 2022. Prebiotics are a growing pillar within gut health, promoting the growth and diversity of good bacteria, adds Goldsmith.

Finally, Moju's Vitamin C & Vitamin D Shots target immunity. Despite the peak of the pandemic being over, high demand for Moju's immunity lines suggest consumers have adopted a greater understanding of the importance of immune-supporting nutrients into their diet, he notes.

With 80% of Moju's consumers choosing to consume shots as part of their morning routine⁸, the company is capitalising on this trend with a £1m marketing campaign in January 2023, designed to encourage more Brits to adopt its Shots as part of their morning routine and kickstart their day.



Source

- 1 IRI, 12 week volume growth vs YA to 04.09.22, brands MAT RSV >£8m
- 2 IRI, Value growth vs YA 52 w/e 04.09.22
- 3 IRI, Value sales MAT RSV, 52 w/e 04.09.22
- 4 CGA BrandTrack, August 2021 & Reach Survey 2021
- 5 Bray Leino Food & Drink Report 2022
- 6 CGA OPM Data to P11 2021 & OOH to October 2021
- 7 Mintel, Fruit Juice, Juice Drinks & Smoothies, UK, January 2021
- 8 Onepulse Consumer Poll, September 2021

MOJU

+142%
VOLUME
SALES
GROWTH

**MEET THE
UK'S FASTEST
GROWING SOFT
DRINKS BRAND.***

Give your sales a *natural boost* with the UK's leading functional shots brand.

*+142% 12 week volume growth vs YA to 04.09.22, brands MAT RSV >£8m

Princes Group

Princes keeps it premium

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 Farrow's
 Flora
 Juicee
 Mazola
 Napolina
 Olivio
 Princes
 Trex
 U:ME
 Vier + Diamanten
 Wielkopolski

 In response to changing consumer demand, popular British food and drink brand Princes has launched two new, premium drinks ranges – Princes Botanicals and Princes Skinny Mixers.

“This marks an exciting chapter for Princes with both ranges being first-of-their-kind for the brand, which is best known for helping families to eat well without costing the earth,” says Jeremy Gibson, brand marketing director at the company. “Princes Botanicals is a soft drinks range that’s packed with taste. It’s made from not-from-concentrate juices and accounts for one of your five-a-day per 200ml serving. This is especially important given how more and more of us are actively seeking out products that are associated with benefiting health¹, which is resulting in the sector for not-from-concentrate drinks growing at a rapid rate of 6.8% year-on-year².”

The range includes two unique flavours that both contain extracts of popular botanical plants; aromatic Apple, Mango, Passionfruit & Cardamon and refreshing Apple, Pineapple & Lemongrass. “The drinks are bursting with flavour and are ready to be enjoyed straight from the fully recyclable carton or over ice for an even more refreshing sip – perfect for an all-day pick-me-up,” says Gibson.

“Princes Skinny Mixers is a range of mouth-watering non-alcoholic juice drinks, perfect for those seeking alternatives to alcohol without wishing to compromise on taste,” he adds.

“It launches at a key time for the sector, which has seen the popularity of no- and low-alcohol drinks double in the last five years³. The range features all the best bits of a great tasting mocktail, coming in three bold flavours; Strawberry Mojito, which is minty and refreshing, the classic Passionfruit Martini, which is the ideal infusion of crisp apple and sweet passionfruit, and Blackberry Bramble, which perfectly



“The launch of Princes Botanicals and Princes Skinny Mixers marks an exciting chapter for the company”

balances juicy blackberries with a hint of citrusy lemon. What’s more, all flavours are low-calorie, have no-added sugar and are made from not-from-concentrate juices and fruit purees.

“Much like the Princes Botanicals range, Princes Skinny Mixers are also flush with flavour and come in a fully recyclable carton. They can also be enjoyed with or without alcohol.”

To help build excitement around the launch of these two ranges and encourage consumers to try the drinks – with the ultimate aim of them becoming a regular purchase – Princes is providing a wide selection of marketing support, reveals Gibson. “This includes an impactful PR campaign, used to increase consumer awareness via media relations, plus influencer marketing during prime seasons for both ranges,” he says. “The ranges are also being supported at point of sale through aisle fins, blinkers, bus stops, website banners and more, which will run until next spring.

“Each drink has an RRP of £2.50, with Skinny Mixers available at Asda and Tesco stores and Botanicals available at Tesco stores – and both set to launch in Morrisons soon.”



Source
^{1,2} Kantar 52 w/e 20.02.22g
³ Mintel, Attitudes towards Low- and No-Alcohol Drinks – UK, 2022

THERE FOR
DRINKS THAT MAKE YOU SMILE TIMES AND
MORE CUSTOMERS IN THE AISLE TIMES.



NEW SKINNY MIXERS


 Low
 calorie


 Great with
 or without alcohol


 No added
 sugar*

*contains naturally occurring sugars

NEW BOTANICALS


 Not from
 concentrate juice


 Made with
 botanical extracts


 One of your
 5 a day*

*per 150ml serving



THERE FOR YOU, ALL WAYS

**Princes New Botanicals and
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Purity Soft Drinks

Tapping into category trends

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KEY BRANDS

JUICE BURST
Firefly

Both of the brands in Purity Soft Drinks' portfolio are driving growth, performing well ahead of the wider soft drinks category. Juice Burst is growing at a phenomenal 70% year-on-year¹ and Firefly at 22% year-on-year², reveals CEO Sarah Baldwin. "This year we have seen Juice Burst go from strength to strength, demonstrating a clear category need for both natural health, great-tasting refreshment and real value for money," she says.

With Firefly, the company is tapping into category trends with flavour evolutions, and exploring formats to allow it to serve more occasions, explains Baldwin. "This summer, to continue to drive our brands, we launched our biggest-ever media campaigns, targeted to relevant audiences through a variety of different channels," explains Baldwin.

"For Juice Burst, we were live with our 'Shake that Tang' campaign, utilising both out-of-home and digital formats in major cities across the UK. We see 'Shake that Tang' as a playful way to express the need to shake up our fruit juice to awaken the real fruit and vibrant taste of the drinks.

"Our ambition was to maximise reach and increase awareness of the brand to the mainstream. As a result, we saw huge success with the campaign, not only reaching over 14m consumers and successfully growing our total brand awareness but also seeing a direct positive uplift on sales."

This year, Firefly made its TV debut with an advert emphasising the brand's still, delicate, subtle taste and drinking experience – the perfect



“Both of our brands stand out in the crowded soft drinks sector. Juice Burst bridges the gap between pure fruit juice and juice drinks, while Firefly brings a unique premium proposition to the adult soft drinks sector”

accompaniment to food and those moments when you need to relax, she notes. This was supported by national magazine advertising, premium health and wellness podcasts and extensive digital and social media activity.

"Both of our brands stand out in the crowded soft drinks sector," says Baldwin. "Juice Burst plays an important role in bridging the gap between pure fruit juice and juice drinks by offering vibrant taste and natural health at an affordable price point.

"Every bottle of Juice Burst contains one of your five-a-day, no artificial colours, flavours or sweeteners, and never any added sugar, making it exempt from HFSS regulations. All Juice Burst products are also ambient with a long shelf life.

"Firefly, on the other hand, brings a unique premium proposition to the adult soft drinks category with its still, light and refreshing flavours. Using only natural ingredients, Firefly is carefully crafted from still water, fruit juice and a blend of botanicals, making it exempt from HFSS regulations."

As of late October, Juice Burst and Firefly achieved new listings in Co-op Central England stores in their front-of-store chiller as part of a meal deal. Juice Burst is also now available in Sainsbury's Local and Sainsbury's petrol filling stations nationwide.



Source

¹ IRI MarketPlace Value Sales
52 w/e 10.07.22

² IRI MarketPlace Value Sales
52 w/e 04.09.22


firefly™

Carefully crafted from still water, fruit juice and botanicals.

Outperforming the soft drinks category, growing 22% YOY*

Unique in the category with its still and subtle flavours.

The perfect accompaniment to food.

*IRI TOTAL MARKETPLACE | VALUE SALES | VALUE SALES 52 W.E. 4/9/22

As seen on TV



CONTAINS ONLY NATURALLY OCCURRING SUGARS



NO COLOURS OR PRESERVATIVES



SUITABLE FOR VEGANS



HFSS COMPLIANT

fireflydrinks.com



JUICE BURST™

SHAKING UP THE CATEGORY!

£20M BRAND GROWING 8X FASTER THAN THE TOTAL SOFT DRINKS CATEGORY*



CONTRIBUTING THE MOST GROWTH TO THE ON THE GO FRUIT JUICE CATEGORY**

14M

ADULTS REACHED IN OUR BIGGEST EVER MARKETING CAMPAIGN

*IRI TOTAL MARKETPLACE | VALUE SALES | MAT TY VS YA TO JUL 22. **IRI TOTAL MARKETPLACE | VALUE SALES | L12WKS VS PP | DATA TO SEP 22



NO ADDED SUGAR



1 OF YOUR 5 A DAY



HFSS COMPLIANT



30% RECYCLED PLASTIC

WWW.JUICEBURST.COM

Red Bull

Delivering on category trends

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Red Bull Energy Drink
Red Bull Sugarfree
Red Bull Zero
Red Bull Editions

Red Bull Energy Drink 250ml is worth over £164m to the total sports & energy category¹, delivering 10% of all sports & energy drink sales in the UK², reveals the company. “With the iconic rhombus design making the can stand out on-shelf, Red Bull Energy Drink 250ml is the No.1 one single-serve energy soft drink in the UK³, making it the essential sports & energy product to stock,” it says.

Successful Summer Edition

Committed to offering consumers choice when it comes to their energy drink consumption, Red Bull launched its Apricot-Strawberry flavour 2022 Summer Edition in March, says the company.

“Following a successful launch, it is the best NPDP so far for Red Bull amassing over £2.2m in the first six months of launching⁴,” it reveals. This will now be a permanent flavour.

With the performance of the Red Bull Editions portfolio growing across all metrics – achieving an 83.5% uplift in sales, now totalling £11.2m⁵ – the new SKU delivers all of the functional benefits of Red Bull Energy Drink, along with a juicy surge of apricot and strawberry that combine to deliver a sweet, refreshing flavour, it says.

The latest Red Bull Summer Edition is also available in a Sugarfree option. “Insight has shown that sugar-free variants have grown spend by 30.5%⁶, and this new Edition will appeal to health-conscious shoppers who increasingly opt for low- or no-sugar variants,” explains the company.

Source

- ¹ Nielsen, Value sales MAT vs YA, 52 weeks ending 7.08.22
² Nielsen, Value sales, 52 w/e 27.08.22, Sports & Energy Drinks
³ Nielsen, Value sales, MAT w/e 27.08.22
⁴ Nielsen Scantrack, Value sales, data to w.e 17.09.22
⁵ Nielsen Scantrack, Total Coverage, Value Sales, Value % change, unit sales, average number of stores, MAT, w/e 27.08.22
⁶ Kantar combined panel, Spend, 52 w/e 07.08.22 vs YA
⁷ Nielsen Scantrack, Value sales, 52 w/e 27.8.22
⁸ Kantar, combined panel, Shopper drivers, 52 wks to 07.08.22
⁹ Kantar, Behavioural survey, Big Cans n=240, small cans n=2179
¹⁰ Nielsen Scantrack, Total Coverage, Value sales MAT to w/e 27.08.22



“Insight has shown that sugar-free variants have grown spend by 30.5%⁶ and our new Red Bull Summer Edition will appeal to health-conscious shoppers”

Multipack trends

With larger formats driving over £228m in value to the category, seeing significant growth of 15.9% vs YA⁷, penetration of these formats up 49.7% vs YA⁸, and over 35% of all larger-can drinkers enjoying Red Bull on-the-go⁹, it is vital to stock these larger variants so that consumers can enjoy a longer-lasting functional boost throughout the day, it adds.

Red Bull Energy Drink 250ml four-pack is the No.1 best-selling multipack in the sports & energy category¹⁰, it notes. “With a variety of flavour and pack sizes to meet consumer needs, Red Bull multipacks make the perfect functional option for shoppers to enjoy on-the-go no matter their individual need state.”

As flavour and multipacks continue to be key sales trends, Red Bull has recently rolled multipacks across its Editions range. The multipacks contain four 250ml cans and are available in four variants: the Red Edition, which features a refreshing watermelon taste; the 2022 Summer Edition Sugarfree, an apricot-strawberry flavour in an option that appeals to shoppers who opt for low- or no-sugar alternatives; the Tropical Edition, with the taste of tropical fruits; and the Tropical Edition Sugarfree.

MORE CHOICES. MORE SALES.

RED BULL 250ML EDITIONS RANGE
+84%
VS YA.
SALES GROWTH



RED BULL GIVES YOU WIIINGS.

SOURCE: NIELSEN SCANTRACK, VALUE % GROWTH, 52 W.E. 16.07.22

Starbucks Coffee Company

Driving chilled coffee growth

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KEY PRODUCTS

Starbucks Doubleshot® Espresso+

Starbucks® Chilled Classics

- Caffè Latte+
- Skinny Latte
- Lactose Free+
- Caramel Macchiato+
- Multiserve Caffè Latte++
- Multiserve Caramel Macchiato++

Starbucks Frappuccino®

- Caramel chilled coffee*
- Coffee chilled coffee*

Plant Based Chilled Classics

- Starbucks® Oat Based Vanilla Macchiato+

+ MRRP£2.00

++ MRRP£3.75

* MRRP£2.10

Source

- Nielsen, Total Coverage to 08.10.22
- Nielsen, Total Coverage to 08.10.22
- Nielsen, Total Coverage MAT to 01.01.2022
- Nielsen, Total Coverage to 08.10.22
- Packaging is certified by ISCC (International Sustainability and Carbon Certification) and FSC (Forest Stewardship Council)
- Nielsen, Total Coverage to 26.03.22

↙ The past 18 months have told a positive story for the ready-to-drink (RTD) coffee sub-category, says Adam Hacking, head of beverages at Arla. The RTD coffee category has continued to see consumption and household penetration growth throughout the last year.

“More people are buying in to the category, to a greater extent, and on a more frequent basis than ever before. As such the category is now worth £260m, a growth of 23.4% MAT¹,” he says. “Part of the category’s popularity can be attributed to the fact it meets more than one consumer need – taste, hydration, an energy boost and satiety. It therefore naturally attracts a wider number of shoppers to the category as consumption is driven by different need states, at different times of day.”

Why Starbucks?

As the category leader and representing 46% of all RTD coffee sales², Starbucks’ chilled coffee has played a fundamental role in spearheading total category growth, adding more than £26m in incremental sales alone in 2021³, reveals the company. Now worth £120m⁴, Starbucks is one of the wider soft drinks category’s most successful brands. So, not only has it earned its place in all soft drinks fixtures, but consumers expect to see it.

The Starbucks RTD portfolio continues to grow and now features a plant-based Chilled Classics range, which includes Almond Plant-Based Iced Coffee, Coconut Cocoa Cappuccino and Oat Vanilla Macchiato, as well



“One of the most exciting things about the RTD coffee category is the speed at which it is evolving”

as its recently launched Multiserve products – Starbucks Multiserve Caffè Latte and Starbucks Multiserve Caramel Macchiato. These are available in convenient, fully recyclable and ethically sourced⁵ 750ml packs and made with 100% Arabica Coffee beans, it notes.

Category future

“RTD coffee may be a relatively new concept to the UK consumer, but the pace of category growth has been exceptional and undoubtedly one of the soft drinks category’s recent success stories, with around 7% of growth in the entire soft drinks category coming from incremental iced coffee sales⁶,” says Starbucks.

“One of the most exciting things about the RTD coffee category is the speed at which it is evolving,” it adds. “Innovative NPDs are continuously hitting the shelves keeping this sub-category fresh and relevant as it progresses at pace to match ever-changing consumer consumption habits.”

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DETAILS

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KEY CONTACTS

Alpesh Mistry
Sales Director GB

KEY BRANDS

Ribena
Lucozade Energy
Lucozade Sport
Lucozade Alert
Orangina

↙ Suntory Beverage & Food GB&I (SBF GB&I) has spent years investing in low- and no-sugar soft drinks to meet the growing consumer thirst for healthier options, says sales director Alpesh Mistry.

“Now more than ever, with the first HFSS regulations in place, we want to help retailers make the most of their zero-sugar ranges,” he says.

Sparkling innovation

Health and wellness have continued to be important to consumers as the world has emerged from the pandemic, reveals Mistry. In fact, 25%¹ of shoppers are more influenced by health when shopping than pre-pandemic, and at least a third of shoppers want to reduce sugar in their diet².

“We’ve seen how this ever-growing trend has helped drive sales in the soft drinks category, with sugar-free carbonates growing over 5%³ in the last year,” he says. “To this end, we launched Ribena Sparkling Zero Sugar in September to help retailers meet this growing demand for zero-sugar choices, particularly among health-conscious younger shoppers.

The Ribena Sparkling range has added over £11m⁴ to the flavoured carbonates segment since its launch in 2020, adds Mistry. “New Ribena Sparkling Zero Sugar features the refreshing taste of a carbonated soft drink in Ribena’s iconic blackcurrant flavour that consumers know and love, without the addition of sugar. The new variety is available in 500ml and 2L bottles, meeting shopper needs for both ‘drink now’ and ‘drink later’ formats.

Bolstering shelf prominence

“Our passion for innovation doesn’t stop there,” he notes. “We have also rolled out a modern, new pack design across the whole Ribena Sparkling range, including Ribena Sparkling Zero Sugar. We did this to bolster shelf prominence and encourage additional purchases. The new packs also showcase reduced-price PMP bottles to help retailers drive value in their range at a time when consumers are more price-conscious.”

The redesign was introduced along



“Now, more than ever, with the first HFSS regulations in place, we want to help retailers make the most of their zero-sugar ranges”

with Ribena’s new brand positioning and ‘Chin Up’ campaign, encouraging people to keep their “chin up” through life’s little stumbles and aiming to drive further relevancy across its drinks and help retailers grow their sales.

Health & wellbeing

With the recent implementation of HFSS regulations, there is a big opportunity for retailers to maximise sales in zero-sugar soft drinks through new additions like Ribena Sparkling Zero Sugar, says Mistry. “Beyond this new addition, the entire range – every single bottle and can of Ribena in all flavours and variants – is exempt from all HFSS restrictions, meaning retailers can continue to stock all our drinks and formats wherever they choose to place them in-store, and continue to maximise impulse sales,” he says.

“Ribena Sparkling Zero Sugar is just the latest example of how SBF GB&I is responding to key industry changes and helping retailers to navigate these and grow their sales even further, while also providing consumers with a choice of great-tasting drinks which tap into their desire for lower-sugar options.”

Source

¹ IGD Research, 21-22 February 2021. Base: 2,001 British shoppers

² Nielsen, Total Coverage inc Discounters, 52 w/e 13.04.22

⁴ EXT IRI, MarketPlace GB, Value, latest 52 weeks to 21.12.21

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