

Soft Drinks

the fastest growing
SQUASH BRAND IN THE MARKET!



Nichols

Vimto wins in squash

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As 2020 draws to a close, the Vimto brand is performing stronger than ever, says the company. After growing consecutively year-on-year (YOY) for the past decade, the iconic soft drinks brand is now worth £94.5m¹, with a staggering 25% growth since 2017. A record high brand value is not the only milestone this year, Vimto is now the nation's eighth most chosen beverage brand² and one of The Grocer's 100 Biggest Brands.

Becky Unwin, senior brand manager, Vimto, comments: "2020 has seen us continue on the past 10 years' trajectory of spectacular brand growth and increasing penetration. Vimto is now bought by one in four households³, thanks to our category-disrupting innovation and stand-out anti-advertising campaign. This places us in a strong position to continue growing the brand and outperforming the category."

Vimto was founded more than a century ago and today offers a broad range of soft drink products, including squash, carbonates, RTDs and flavoured water. The company prides itself on consistently meeting changing consumer needs and celebrates being different, which is what the Vimto brand is all about.

Success in squash

"Vimto is the fastest-growing squash brand in the market⁴ and has strengthened its No.2 position⁴ this year with continued innovation," she adds.

"We are one of the original makers of squash and our 2020 NPD is a prime example of how we regularly refresh the category. Building on an already broad flavour palette, we launched two new products this year



“Our 2020 NPD is a prime example of how we regularly refresh the category”

– Vimto Remix Orange, Strawberry and Lime and Limited-Edition Winter Warmer.

"Our innovation is always anchored in consumer need – but with a twist. We know that Orange is a firm favourite in the category, making Vimto Remix Orange, Strawberry and Lime the perfect addition. It's something different, that ensures we keep offering that all-important choice."

Bringing warmth to winter

For the colder months ahead, Vimto has introduced its limited-edition Winter Warmer. "Specifically designed to be enjoyed hot, Winter Warmer takes the much-loved, unique blend of Vimto's secret recipe and infuses it with cinnamon, nutmeg and clove to offer a deliciously festive flavour," explains Unwin.

"As one of the leaders in healthy hydration and choice, we offer both original and no-added-sugar products that deliver on flavour and can be enjoyed by everyone," she adds.

"Both our 2020 launches contain no added sugar, as well as added vitamin C, making them particularly family-friendly.

"Following yet another strong year of total brand growth, Vimto is now looking ahead to an even bigger 2021. You won't want to miss it."



Sources

- 1 Nielsen, Total Coverage, MAT to 03.10.20
- 2 Kantar, Brand Footprint 2020, 52 w/e 06.10.19
- 3 Kantar, WPO, MAT to 14.06.20
- 4 Nielsen, Total Coverage, MAT to 03.10.20

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Analysis



Lifestyle responders

There's a soft drink to suit almost every lifestyle choice made by a consumer. But in a year of change, suppliers have had to be agile to keep up with some 'seismic' shifts in consumption behaviour

➤ In the US, back in 2010, Apple trademark-registered the phrase 'There's an app for that'. The catchy slogan, repeatedly parroted in the media, became used for all kinds of blogs and social media jokes related to totally non-technical products, even including 'If you want to write an app that makes fun of apps, there's an app for that'.

However, as the app market continues to surge, with an estimated 8.93 million mobile apps now on the planet, according to RiskIQ earlier this year, Apple's slogan just gains weight and veracity.

So what does this have to do with soft drinks? In terms of variety and selection the soft drinks category is vast, with the choice consumers opt for governed by a whole host of lifestyle factors, ranging from simple refreshment, through

mixers, health, energy, performance, functional and now plant-based to name but a few. In fact, given the diversity and range of the sector, it would not be a stretch to say that, whatever factor the consumer is looking for, then 'There's a soft drink for that'.

The sheer choice available to consumers is, on the one hand, confusing and, on the other, exhilarating, with smaller feisty competitors and disruptors coming in to challenge the giants of the market, particularly in the energy, performance and functional field.

"Consumers' outlook on health, social concerns and the environment are steering many of the trends we are seeing in the soft drinks market," says George Phillips, commercial director at Wanis International Foods, distributor for fruit stills brand Tropica Vibes. "We

have seen a divide in what consumers want and expect from a soft drink. On the one hand there are consumers who seek a healthier option with sustainable credentials, while for others a soft drink is a treat or minor indulgence, bought for taste and enjoyment."

Yet, thanks to the ever-present Covid-19 this year, as with every other food and drink category, the dynamics of the market have shifted considerably and suppliers have had to show resourcefulness and agility to keep pace.

In the soft drinks category where £1 in every £10 is spent on flavoured carbonates to a value of £1.6bn¹, according to Britvic Soft Drinks at-home commercial director Ben Parker, one of the key factors that came into play following this year's pandemic lockdown was the sudden rise in the



+27%

the rise in at-home adult soft drinks opportunities⁷

Kantar Worldpanel, 52 w/e 14.06.20

£5.6m

Value sales of kombucha in the UK market¹³

IRI Market Data, YTD to 06.09.20

+20.2%

Growth in iced coffee in the UK market¹⁶

Nielsen, Total Coverage, to 08.08.20

+14.6%

Growth in 'wellness' drinks in the market¹⁰

Kantar, 52 w/e 23.02.20

'drink-later' or multi-pack formats, as high street and hospitality outlets, used to selling single-serve formats, were hit hard. At the same time, retail outlets and e-commerce saw an acceleration in sales. In-home consumption grew, while on-the-go and eating out declined and, with it, the way soft drinks consumers engaged with the category.

"In recent months, we've seen an increase in drink-later formats, with this market growing by 11.7%² this year to date," says Suntory Beverage & Food GB&I sales director Alpesh Mistry. "Multipacks have played a large part in driving this, growing 9.4%³ as market dynamics shift. These trends are replicated in our portfolio, with strong growth of 9.3%² in Lucozade Energy's drink-later range, including 1L bottles and multipacks... growing faster than the soft drinks category⁴.

"We have moved quickly to respond to these shifting shopper missions to ensure we continue to give consumers the drinks they want in the formats they want."

Coca-Cola European Partners (CCEP) also reports an increase in demand for larger pack formats, like multipacks of cans and large PET bottles "because more consumption moved into the home", says Simon Harrison, vice-president commercial development at CCEP GB. "The value of future consumption packs across our portfolio has grown by 7.8%⁵, driven mainly by multipacks of cans, which have increased in value by 14.3%⁵," he says. "Larger packs also offer volume and value for money, which is understandably a focus for shoppers in the current climate."

Vimto senior brand manager Becky

Unwin describes the situation as a "seismic shift in consumer behaviour", noting that shoppers took comfort in familiar established brands, which she says meant household names performed even more strongly. "We reached a record high brand value of £94.5m this year⁶," she says. "Take-home soft drinks sales jumped significantly higher... and squash saw a real resurgence as families spent more time together indoors."

"A big night in has continued to be a key occasion for consumers where possible," says Britvic's Parker. "As shoppers continue to cut back and reprioritise their spend, the future of staying in more often looks set to carry on for some time." He notes the number of adult soft drinks occasions at home has increased by 27%⁷, now sitting at 5.2 billion total opportunities

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“with no signs of slowing down”. “The trend lends itself to larger pack formats and multipacks, which many of our brands offer.”

Some soft drinks suppliers recognised and acted on the rapid increase in the at-home cocktail culture, either via new launches or mixers to suit consumers’ needs. For Belvoir Fruit Farms, its newly launched flavours Alcohol-Free Passionfruit Martini, sparkling Ginger & Lime and Strawberry, Lime & Mint cordials “are designed to be perfect ready-made mixers, stand-alone refreshment or even emulate Britain’s favourite cocktails, so that consumers can tap into the cocktail bar feel at home and create their own special occasions”, says the firm’s managing director Pev Manners. He explains that the company’s Alcohol-Free Passionfruit Martini emulates “Great Britain’s favourite cocktail”.

For some brands, the consumer shift to local shopping and the convenience channel had a significant impact. For FrieslandCampina, which produces dairy-based brands Yazoo and Chocomel, the latter brand was only in its second year in the UK and only available in the convenience channel when the pandemic hit the market. Yet despite the drop in on-the-go purchasing, the brand’s sales “grew steadily every month from January through to July, resulting in a year-on-year rise of 88% in value sales⁹”, says Dan Chesbrough, business unit controller (grocery) at FrieslandCampina. “With the launch of a UK-exclusive 12-pack tray of 250ml cans, as well as a one-litre pack, the company “avoided any dip in sales, growing to become a £2.3m brand⁹”, he adds.

Heroes on Zero

With the low- and no-sugar trend continuing in line with both consumer demand and at the behest of government action on obesity, many brands have introduced Zero products into their range. Among the latest to do so are Hungarian firm Hell Energy Drinks, which introduced as Zero version of its Classic line in June; and kombucha brand The Gutsy Captain, which has developed a Zero range in six flavours, including Original, Ginger & Lemon and Raspberry.

Meanwhile, CCEP is staking its claim for its Monster Ultra range as number



one in the zero sugar energy segment, which it says is worth more than £72m and is in growth by 20%¹⁴. Its newest flavour in the range, launched this year is Monster Ultra Paradise, which it says is already worth over £2m¹⁵.

Red Bull has also expanded its range to include a sugar-free variant on most packs in its portfolio, says off-premise sales director Andrew McQuade. “A core range of sugar, sugar-free and zero variants in sizes shoppers are searching for is key for a strong portfolio as we move into 2021.”

Healthy focus

With people at home more, the focus on health and fitness has risen exponentially as consumers strive to maintain both mental and physical wellbeing. Two-thirds of consumers admit to trying to lower their sugar intake, says Grenade (p24).

“Wellness drinks are delivering strong growth (+14.6%), exceeding that of the total soft drinks category (+4.3%)¹⁰,” adds Britvic’s Parker, pointing to its sparkling vitality brand

Purdey’s, which contains B-vitamins, botanicals and 50% fruit juice, as well as only naturally-occurring sugars.

“The demand for wellness has rocketed with Covid-19,” agrees Mark Neville, founder of Upbeat Drinks. “Looking after our health and putting goodness into our bodies has become non-negotiable. At the same time, consumers are watching their wallets, so health has to come at an everyday accessible price.”

Red Bull’s McQuade reckons the sports & energy sector of the market is worth £1.3bn, with growth totalling over £25.3m versus 2019¹¹. “This growth has been fuelled by an increasing demand for functional energy, with these drinks having added over £130m vs 2019 and fast-approaching a billion-pound segment, today worth over £900m annually¹¹.” He notes that “two 250ml cans of Red Bull Energy drink are sold every second in the UK¹²”.

Swedish firm No Carbs Company, which focuses on its health- and exercise-oriented brand, Nocco, arranged free Zoom and Instagram live



Fruit flavours continue their march

Natural fruit flavours have really come into their own in the soft drinks market of late, with raspberry and lime flavours in particular, coming to the fore.

Belvoir Fruit Farms' newly launched flavours include sparkling Ginger & Lime and Strawberry, Lime & Mint Cordials.

Suntory Beverage & Food GB&I has introduced Raspberry and Blackcurrant versions in its new Ribena Sparkling brand, which went "from concept to execution in just 12 weeks". In addition, the company's

Lucozade Energy Citrus Chill provided consumers with a new lemon & lime flavour drink, while Lucozade Sport added Cherry Kick.

In cordials, the company introduced Ribena Glorious Crisp Pear & Rose and Splendid White Peach & Hibiscus, while in squash, the brand added a Raspberry & Rhubarb variant.

Coca-Cola European Partners' Fanta Zero Raspberry brand, unveiled in March "to tap into the continued popularity of raspberry-flavoured productsⁱ, is already worth almost £3m,

says the company. Meanwhile, its Diet Coke Sublime Lime has delivered £5m worth of sales since launching in January, it says.

Vimto released a new flavour this year – Vimto Remix Orange, Strawberry and Lime – in RTD, squash and carbonated formats. The company maintains orange is second only to cola in terms of flavour popularity so reckons this no-added sugar product will prove "a strong performer".

Britvic Soft Drinks says its Pepsi Max Raspberry has become the biggest flavour

extension in soft drinks since its launch in 2019ⁱⁱ. The company also points to the upcoming Christmas opportunity for premium products, with brands such as its J2O Glitterberry and Robinsons Crushed Apple and Cinnamon Cordial.

In functional foods, such as those promoting gut health, fruits are also coming to the fore. Kombucha brand The Gutsy Captain, distributed by Red Star, is planning to introduce further flavours this year, including Pomegranate and Watermelon & Mint.

workouts with its UK ambassadors, as "many people looked for new ways to exercise at home via virtual workouts in an effort to stay active and healthy, and for positive inspiration and motivation", says Carlotta Cattalani, country marketing manager at Nocco UK. As a result, its social media following grew by 50% during the lockdown, she says.

"The unexpected and worldwide Covid-19 pandemic has enabled our consumers to focus on their health and wellbeing like never before," says Inês Freitas, chief marketing officer of kombucha brand The Gutsy Captain, distributed in the UK by Red Star. "It has been an unprecedented opportunity for brands like The Gutsy Captain, which are already well established in the health space, to expand further channel opportunities, such as e-commerce and convenience to directly appeal to the shift in consumer demand." Kombucha is now valued at £5.6m¹³ in the UK, but is continuing its strong growth trajectory of +56%¹³ year-on-year in value, she

adds, estimating the category could be worth over £32m in the UK by 2025.

All things caffeine

One sector of the market that has been "particularly resilient through this extraordinary year", says Starbucks, is iced coffee. Adam Hacking, head of beverages at Starbucks iced coffee supplier and distributor Arla, says iced coffee "has benefited from over-indexing in its retail channel presence with the category experiencing 20.2% growth¹⁶". "In the past 12 weeks alone the Starbucks portfolio has added £5.6m in retail value sales to the iced coffee category, representing 73% of all category growth within the period¹⁶."

Plant-based drinks have also been embraced in the coffee sector, with Starbucks following up the initial launch of Almond Plant-Based Iced Coffee last year with two additional milk alternatives – Coconut Cocoa Cappuccino and Oat Vanilla Macchiato – this year.

Crediton Dairy, which supplies Arctic Coffee, says the brand's iced coffee

sales were up 32% year-on-year versus the overall iced coffee category, up 21% over the same time period¹⁷. The company introduced a 1L format, which it says was always in the planning for this year, but proved very popular as in-home consumption, due to the pandemic, continued to grow.

"Our new 1L formats are delivering valuable incremental category sales," says Jo Taylor, brand manager for Arctic Coffee. "In fact, over 78% of the sales have proven to be incremental¹⁸."

Hungarian firm Hell Energy Drinks launched two new additions to its portfolio in June – latte and cappuccino – having "recognised the growing trend and positive CAGR in RTD iced coffee", says UK country manager Michael Edwards. The energy brand uses real coffee extract from Robusta and Arabica beans and the product is fully pasteurised with UHT using fresh local milk, he says.

The popularity of iced coffee is hardly surprising, given that coffee overall continues to be "the second most-consumed drink in the UK

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(behind water)¹⁹, according to CCEP. “The RTD sector in particular is in rapid growth²⁰ and is set to more than double in size in the next 10 years, demonstrating vast consumer demand for a caffeine boost in a convenient format,” says the firm. Having unveiled its Costa Coffee RTD range last year in three variants – Classic Latte, Caramel Latte and Black Americano – the company says this is already worth nearly £8m²¹. CCEP’s range also features Espresso Monster – a combination of real brewed coffee and its Monster Energy blend, designed to appeal to energy drink fans and coffee lovers alike.

Gen Z, influencers and social media

Widespread use of social media, as well as influencers, to woo the younger generation is rapidly being adopted by savvy soft drinks marketers.

Fentimans says the growth of online has catapulted its e-commerce strategy, and it has had to flex this to meet the demands of consumers (p22).

Freitas from The Gutsy Captain sums up the latest target market: “Gen Z are engaged with brands that provide pleasure and indulgence without compromising health and wellbeing and they are willing to make better, more informed and conscious choices – not only about what they eat and drink, but in all life dimensions with a holistic life approach.” The brand has strived to communicate its credibility online with a focus through social media and influencers.

Aqua Carpatica president and CEO Jean Valvis points to the fact that Gen Zers are “entering into adulthood during a global pandemic”. As such, he says, they are comfortable with the digital world and rely on it for learning shopping and entertainment. “Gen Zers actively manage their online identities and are vocal about their concerns, so brands need to balance achieving popularity and awareness with maintaining a sense of relevance and distinct USPs. Gen Z prefer unique products and our nitrate-free [water] proposition with a fully traceable story is cutting through the noise.”

He also notes that as social media platforms offer brands great opportunities to reach and engage with younger consumers, the role

of video in this medium should not be underestimated. “Gen Zers view significantly more video media on platforms such as Youtube and TikTok than other cohorts do. That automatically influences their choice of brands and products.”

And he adds that the audience of TikTok and Instagram leans heavily on influencer culture, saying: “Influencers can make a real difference with a fifth of Gen Z having shared more influencer content via social media since the Covid-19 outbreak.” As such the brand chose Instagram as its lead platform to develop an influencer campaign aimed at generating positive engagement around the launch of its brand store on Amazon in August.

“Kantar data suggests a 37% increase in the use of Facebook and a 24% increase in the use of Instagram since the pandemic started,” says Hell Energy Drinks’ Edwards. The business has therefore been active on these platforms, as well as advertising on Netflix and Youtube and utilising its influencers – American actor Bruce Willis and Puerto Rican actress and model Zuleyka Rivera.

Wanis International Foods’ Phillips says that, with the Tropical Vibes brand still young and growing, the company

has focused the bulk of its marketing so far towards online and point of purchase. He says direct engagement with shoppers via sampling and in-store merchandising, aimed at raising awareness and trial, has been the most effective route for the company.

Peter Mayes, co-founder of independent start-up alkaline water company Zuddha Water, notes: “We are aware of the power of social media as a means of reaching out to the younger generation. However on these platforms, just telling someone to buy something is a crude mechanic – recommendations, endorsements, associations and engagement seem to work better.”

However, he adds it is too simplistic to look at Gen Z in isolation, as there are changes occurring in every group. “Consumers are fracturing and becoming more diverse in preferences. Some are more questioning of what they are consuming and more open to new concepts, which we see happening across the board.”

Belvoir Fruit Farms’ Manners says: “Post-millennials are as familiar with the back of the packaging as they are the front. They fuel their bodies with brands that have functional and tangible benefits to their natural wellbeing.”





Form and function

Four little letters have become commonplace across the soft drinks industry when it comes to health-enhancing products. BCAA (or branched-chain amino acids), designed to enhance muscle recovery appear alongside vitamin-enriched drinks aimed at supporting active healthy lifestyles.

Nocco, which describes itself as “the pioneer of the performance energy category”, says its range features two caffeine-

free BCAA+ varieties. “One can of Nocco BCAA contains five different types of Vitamin B (folic acid, niacin, biotin, B6 and B12) to help reduce fatigue and exhaustion and contribute to maintaining normal energy metabolism, plus vitamin D, which contributes to maintaining normal muscle function,” says Nocco UK country marketing manager Carlotta Cattelani.

Coca-Cola European Partners, which entered the performance energy

category for the first time last year with its Reign Body Fuel, says the product contains 200mg of naturally sourced-caffeine and is enriched with functional ingredients to help consumers achieve better results when they work out. These include BCAAs “to prevent protein muscle breakdown”. L’Arginine improves blood flow and stimulates the release of growth hormones and Vitamins B3, B6 and B12 can contribute

to reducing fatigue and normalising the metabolism,” says VP commercial development Simon Harrison. “Since launching in the UK at the end of 2019, Reign has become the biggest performance energy drink in GB, worth £4m, and four times bigger than its nearest competitor^a.

Meanwhile, Refresco Drinks UK says its reformulated Sunny D brand now delivers 50% of a person’s daily Vitamin D requirement.

Sustainable actions

A new generation of companies are leading by example in taking an ethical stance on sustainability from the word go. As one of these, Zuddha Water took the stance to only produce its brand in glass bottles and minimise the use of plastic at all stages of its production process, says Mayes. This, he adds, was also to maintain the integrity of the water regarding its taste and not risking any leaching of potential plastic contaminants into the water.

At Crediton Dairy, Taylor says that, in addition to its cartons being fully recyclable, the company recently moved to bio-based caps, made from renewable plant-based material.”

The bigger companies are also driving through their sustainability message as they recognise its importance to the planet and the upcoming generations of consumers.

“As part of Suntory Group’s vision of ‘Growing For Good’, we are using our position in the industry to help drive a circular plastic economy,” says Mistry. “We believe in the sustainable future of plastic – it is both versatile and lightweight and offers convenience for consumers. But, as a society, we have used the resource poorly. However, we’re confident it’s possible to turn

this around and move to a world where plastic is used responsibly and sustainably.”

The company has a target to move to using only 100% sustainable plastic bottles by 2030. “On our way to reaching this ambition and with the panned deposit return schemes (DRS) creating more recycled plastic, we expect to reach at least 50% sustainable packaging by 2025.

“A major challenge to generating enough recycled plastic to help us meet our 2030 goal is the fact that just 8%²² of bottles consumed on-the-go are currently recycled. This must drastically change if we are to make our 2030 plan a reality, and we and the wider soft drinks industry cannot achieve this alone.”

He expects a DRS scheme to help and says estimates suggest such a scheme will push recycling rates to 90%²³ within three years. “In our view, the best DRS is one that’s introduced GB-wide... this, together with more efficient and consistent collections of household recycling by local councils and investment in reprocessing of plastics in the UK so no plastic is exported, would effect real change.”

Vimto’s Unwin says an ongoing

commitment to sustainability is at the heart of its strategy as it looks to continually evolve its packaging formats. “All Vimto cans, bottles and cartons are 100% recyclable and we’ve used recycled material within our packaging for several years,” she says. “For example, our Vimto squash bottles contain 51% recycled material (rPET).”

CCEP GB’s Harrison maintains the company reached a milestone in creating more sustainable packaging in September this year, with the plastic used in its bottles now coming from recycled or renewable sources. “Dedicating space in-store to products with the strongest sustainability credentials is becoming more important, especially for a young adult audience,” he says. It’s the right thing to do for the planet and it’s an increasingly important factor in consumers’ buying decisions²⁴. In fact, post-Covid... the motivation to buy product with recycled materials has gone up in importance.”

Britvic’s Parker says the company recently commissioned research to understand the recycling habits of the nation, in support of Recycle Week. “The research revealed that the majority of Brits (93%) think it’s important that retailers set an example

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to others when it comes to recycling²⁵, with over half thinking retailers could do more to help consumers.”

He adds that 100% of Britvic's bottles and cans are recyclable and the company recently provided £5m of “transformational investment support in UK-sourced rPET to support its long-term plans”. It has also committed to removing at least 500 tonnes of plastic weight by the end of this year.

Looking ahead

With Christmas approaching and little sign that Covid-19 is anywhere near resolved, suppliers are settling in for the long haul when it comes to changed consumer purchasing habits.

Britvic's Parker says Christmas is “going to look different this year, with a lack of parties and out-of-home social occasions”. “We predict larger-pack formats will continue to remain a key opportunity for retailers and premium products will have an important role to play as consumers indulge in products to treat themselves and get into the festive spirit.”

The focus on larger packs – “for the volume and value they offer and suitability for sharing” – will continue to be in increased demand, agrees CCEP's Harrison. “Soft drinks like mixers, colas, flavoured carbonates, squash, energy and RTD coffee will still play an important role for consumers who want an affordable pick-me-up while working from home or something to enjoy while watching sports, gaming or socialising. And when it comes to permissible treats, we expect demand for low- and no-sugar options to remain high as consumers continue to be mindful of their health.”

There has been a lot of talk around “building back better” as the country looks to recover from the impacts of Covid-19, he adds. “Many recognise this moment as an opportunity to accelerate the progress made on the sustainability agenda to date – in environmental, social and economic terms. Businesses like ours must seize this opportunity with both hands – it's our responsibility and consumers expect it from us.”

“The global pandemic has forced all of us to take a step back and a closer look at business models, customers and products during this unprecedented year, while consumers have become



savvier in terms of choices, putting health at the forefront of their missions,” says Aqua Carpatica's Valvis. “Consumers will be increasingly price-driven post-lockdown, seeking value but also changing their shopping mission to reflect their focus on health and with a willingness to spend more for their wellbeing.”

Phillips at Wanis International Foods points to the growing difficulties of recession along with the prospect of further lockdown, which will “inevitably impact consumer spend on non-essential items”. “The notions of ‘affordable treat’ or ‘value-for-money indulgence’ will be very much to the fore in both our sector and others,” he says.

“As we move through the ‘new normal’... consumers will continue to re-evaluate their priorities and purchasing habits,” says Nocco UK's Cattalani. “This provides brands, across all sectors, with a valuable opportunity to not only develop and innovate, but to offer guidance and support to existing and new audiences as we navigate the coming months together.”

With products such as high-protein iced tea being touted as the next big

trend in soft drinks, the restless nature of the market looks set to continue, but one thing is certain: whatever a consumer's need state, be it health, indulgence, energy or lifestyle, you can pretty much guarantee, ‘There's a soft drink for that’.

Sources

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 - ²⁵ OnePoll research, 2000 UK adults, Britain's recycling habits, commissioned by Britvic, August 2020
- Fruit Flavours Panel**
- ¹ Nielsen Total Coverage, MAT to w/e 13.07.19
- Form and Function Panel**
- ¹¹ Nielsen RMS, Total Coverage GB, Value Sales MAT to 28.03.20
- ¹⁸ Nielsen Answers Value Sales, Total GB YTD w/e 05.09.20

Tropical Vibes

Keeping the Vibe alive

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KEY BRANDS

Tropical Vibes

➡ To quote the Daily Mail in July 2020, “Tropical Vibes has been taking the world by storm”.

Launched in time for the 2019 season, the Tropical Vibes range of exotic juice drinks has seen nothing short of meteoric growth, says brand distributor Wanis International Foods. With the eight Original fruit flavours joined by a range of five American-style Lemonades in June 2020, no less than 11m bottles have been sold since launch¹. Based on unit sales in the 52 weeks to 30 September 2020, Tropical Vibes has passed £7.5m at retail¹ and continues to grow at over 70% year-on-year¹.

George Phillips, commercial director at Wanis, says: “Launching into the hugely competitive soft drinks market demanded an innovative approach. A unique range of exotic and fun flavours, all made with fruit juice to deliver great taste, allied with the right price point and attractive trade margins means we have hit the ‘sweet spot’. A deliberate decision to avoid packing in PET, with its associated issues of waste and recycling challenges, and to offer Tropical Vibes in a 300ml impulse glass bottle has also proved popular with our consumers.

“Competition for the consumer’s spend has never been so fierce – a competitive market and the social and economic conditions imposed by the ongoing Covid-19 pandemic make value for money ever more important for the consumer,” adds Phillips. “With a £1 recommended retail price, despite the restrictions surrounding Covid-19, during the middle of summer, we were forced to put customers on restricted allocations due to demand outstripping supply. While stock was available throughout, the organic effect



“A competitive market and the social and economic conditions imposed by Covid-19 make value for money ever more important for the consumer”

of youth influencers pushed demand to new highs, even though most outdoor events were cancelled.”

Wanis International Foods supplies more than 4,000 grocery retailers of all types and sizes directly, and this, together with the support of wholesalers and cash & carries nationwide, has ensured the distribution build for Tropical Vibes has been rapid, he says. The brand has since launched into the multiples, with initial distribution secured in Asda, Morrisons, Sainsbury’s and Co-op.

“Trade response to Tropical Vibes and the support we’ve received has been magnificent, making this a fast-paced and exciting journey,” he adds.

The brand has focused extensively on both trade and consumer engagement at point-of-sale, with strong promotional programs backed by in-store merchandising and branding, consumer sampling and an innovative NPD program, overlaid with extensive activity on social media and online platforms, he reveals. Raising awareness among consumers and encouraging trial remains a key objective ahead of further exciting NPD launching for the 2021 season.

And what of the future? “The journey continues and to quote our brand strapline – ‘Keep The Vibe Alive!’.”



Source

¹ Manufacturer’s unit sales

AQUA Carpatica UK

Healthy hydration

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KEY BRANDS

AQUA Carpatica

The UK is now officially in recession, Covid-19 is ongoing, and Brexit is still to come – a set-up no FMCG study was forecasting less than a year ago. Yet the FMCG industry is now seeing the highest growth rates ever recorded (+18%¹), with 76%¹ of FMCG categories, including plain water, currently in growth. Set to steadily increase in volume, water now accounts for over 22%² of the total soft drinks market in the UK, with sparkling taking a majority share of just over 40%².

Consumers, particularly Millennials, are more health-conscious, and with health at the top of the agenda – both in terms of the pandemic and the government's obesity strategy – the shopping trends reflect an increased focus on health and wellness. As such, water is set to be the standout performer in the next three years and is likely to be picked up in greater quantities and bigger formats.

"In this competitive sector, Aqua Carpatica stands out as one of the purest natural mineral waters on the market," says president and CEO Jean Valvis. "Meeting the growing consumer demand for health and premiumisation, this award-winning natural mineral water is the first of its kind in the UK – virtually nitrate-free and with one of the lowest sodium levels around. Drawn from pure aquifers, nestled deep in the heart of the Carpathian Mountains, Aqua Carpatica combines an exceptionally balanced mineral content of calcium and magnesium, a great choice for health-conscious consumers."

The range consists of an extensive portfolio in various formats, still and sparkling, packed in glass, 100% rPET and PET (BPA free). "They suit all



“Water is set to be the standout performer in the next three years and is likely to be picked up in greater quantities and bigger formats”

occasions and all ages; for example, our innovative Aqua Carpatica Kids bottle, with the spill-proof sippy cap, was designed with the health of children in mind,” adds Valvis.

“Choosing wisely when it comes to hydration has become even more important nowadays, as we treasure health. The combined benefits of Aqua Carpatica allow consumers to maintain a progressive healthy lifestyle and bring added value to it: a premium water brand in exceptional packaging.”

Sustainability remains a key issue for the firm, he says. “Driven by a promise to care for and protect the natural springs and environment around them, we remain committed to people and the planet and have launched four 100% rPET products on the UK market, which are 100% recycled and recyclable.”

The brand has also developed agile strategies to support each consumer segment. “The pandemic is a pivotal moment for our generation, influencing our future attitudes, needs, health and expectations,” says Valvis. “Aqua Carpatica is here to remind consumers about value-added and not simply value – let’s not take things for granted any more and let’s start with our health.”



Source

¹ Kantar, FMCG Panel, September 2020

² Zenith 2019/20 UK market developments and 2020/21 outlook



Committed to the people
and the planet



Natural mineral water
Virtually nitrate free
Protected springs



www.aquacarpatica.co.uk

Belvoir Fruit Farms

Belvoir's cordial welcome

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KEY PRODUCTS

Strawberry, Lime & Mint Cordial
Alcohol-Free
Passionfruit Martini
Sparkling Ginger & Lime

➡ The past year has seen consumer buying habits change completely in reaction to the Covid-19 pandemic and, as a result, Belvoir Fruit Farms' cordial range has been a winner – as out-of-home consumption transferred to in-home, reveals the company. Belvoir became the fastest-growing premium cordial brand in Great Britain with the fastest category growth – as sales averaged a 22% rise versus 2019¹.

The brand's adult cordial range – all made with natural ingredients, including Elderflower, Ginger, Blueberry & Blackcurrant and Lime – has seen a surge in popularity as family entertainment budgets were diverted into grocery. While seeking drinks that taste good and keep families hydrated, shoppers want to recreate the on-trade experience at home, with natural ingredients they understand and trust.

This trend looks set to continue and Belvoir Fruit Farms has launched innovative NPD to harness the nation's appetite to make the best of the new normal. Its newly launched Strawberry, Lime & Mint Cordial, ready-to-drink sparkling Alcohol-Free Passionfruit Martini, and the lightly sparkling Ginger & Lime Pressé, are made with natural ingredients and are designed to help moments at home feel special, says Belvoir. Their versatile nature means they can be used alone as a real fruit refreshment, as a mixer, or – in the case of the Alcohol-Free Passionfruit Martini – emulate Britain's favourite cocktail tippie, helping to bring the cocktail-bar feel into the home.

Managing director Pev Manners says: "Our continuing range expansion is about giving our customers more delicious options, using natural ingredients that feel special, trusted and versatile in use. Especially in these times, we want to help our customers enjoy and savour a special moment.

"We're seeing consumers drinking less alcohol and looking for alternatives to cocktails. Our new launches reflect what we're seeing customers do with our naturally tasty drinks – enjoying them solo, as a delicious alcohol substitute or as a component in their favourite tippie. We'll continue to



“We’re seeing consumers drinking less alcohol and looking for alternatives to cocktails”

innovate to make sure we appeal to a diverse consumer base.”

While Belvoir has enjoyed great success with its cordials range, the lightly sparkling pressé category, strongly linked to social occasions, saw a decline during April, as family events like Mother's Day and Easter happened during the peak of lockdown. However, this bounced back in early summer, as the warmer weather enticed consumers to socialise in small groups outside.

In reaction to this trend, Belvoir Fruit Farms extended the reach of its lightly sparkling Pink Lady Pressé and Elderflower Pressé this summer, offering a lunchtime lockdown treat as consumers continued to work from home, as well as a perfect soft drinks accompaniment to a socially distanced small gathering, picnic or BBQ.

With the grocery sector continuing to drive cordial sales, Belvoir Fruit Farms is prioritising marketing support to specialist, convenience, and independent retailers, as well as bars, restaurants and pub customers through the remainder of 2020, including shelf fixtures, in-store magazine features and advertising, designed to appeal to consumers across the demographics.

Source

¹ IRI Total Market, Volume
Sales 52 w/e 18.07.20

All made with
simple, natural
ingredients



Delicious refreshment
from Britain's fastest-selling
Premium Cordial Brand.*

* IRI Major Multiples, Volume ACV wtd ROS 52we 20.06.20

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www.belvoirfruitfarms.co.uk

*Belvoir
fruit farms*

Britvic Soft Drinks

Healthy at-home choices

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KEY BRANDS

Robinsons
Fruit Shoot
Robinsons Refresh'd
J2O
Pepsi MAX
Tango

Soft drinks play an important role in people's everyday lives, but shopper habits have changed and evolved during the course of the Covid-19 pandemic, particularly as people spend more time at home.

Socialising has adapted

Ben Parker, at-home commercial director at Britvic, comments: "After a difficult and disruptive year for many, consumers are turning to well-known, trusted brands that they feel confident in, such as J2O, Robinsons, Pepsi Max and Tango.

"During the pandemic, socialising in home increased by 31%¹, with 5.2 billion at-home soft drinks occasions for adults¹. This currently shows no sign of slowing down, with small gatherings continuing to take place where possible in households and becoming ever more important², giving retailers the opportunity to upsell for the big night in and quality family time occasions under the government guidelines."

Brands like Pepsi Max and Tango are available in larger pack and multi-pack formats to help retailers cater to changing shopper needs. For adults looking for a premium night in or treat, J2O Spritz Apple & Elderflower and J2O Glitterberry are well placed to drive value during the festive period, says Parker. "J2O accounts for 32% of total adult category value sales in the lead up to Christmas³, so both Glitterberry and Spritz Apple & Elderflower can drive value for retailers while appealing to the adult audience."

As the biggest brand in the squash category⁴, Robinsons has seen 27% growth during lockdown⁵, he says, and with the Robinsons Fruit Creations and



"After a difficult and disruptive year for many, consumers are turning to well-known, trusted brands"

Robinson Fruit Cordials range, there is an offering for all the family's needs. "Both have proven to be a phenomenal success. At the top tier, Robinsons Fruit Cordials has delivered a 10% value growth⁶, while 'better tier' Robinsons Fruit Creations is showing strong growth of 12.6%⁷," notes Parker.

Low- and no-sugar thrive

"Low- and no-sugar options continue to be key for consumers, as part of the growing focus on health," he adds. "Innovation remains absolutely fundamental in this area and for driving carbonate growth in particular." Pepsi Max Raspberry has become the biggest flavour extension in soft drinks since its launch in 2019⁸, he reveals, and has continued to deliver a strong performance with loyal support from shoppers, offering strong repeat rates⁹.

"We remain committed to offering not only healthier choices, but those that do not compromise on taste, for example Pepsi Max Cherry. We continue to drive innovation in this area and, currently, 99% of our owned portfolio is below or exempt from the Soft Drinks Industry Levy."

Source

- 1 Kantar AH Consumption occasions, 12 weeks to 17.05.20 (8 weeks in lockdown, and the 4 weeks before)
- 2 Kantar Worldpanel data, Total SD, 12 w/e 17.05.20/ CGA Covid-19 Weekly survey 29.03.2020
- 3 Nielsen, Grocery Multiples Value Sales, L12 w/e 01.02.20
- 4 Nielsen RMS Total Coverage GB, Squash Value Sales, 52 w/e 27.06.20
- 5 Nielsen RMS, Total Coverage GB, Value % Change, 12 w/e 27.06.20
- 6+7 Nielsen Scantrack Total Coverage GB, Value % Change, 52 w/e 27.06.20
- 8 Nielsen RMS, Total Coverage GB, Value Sales, MAT to 28.03.20
- 9 Kantar Worldpanel, Total Stores, Repeat Rates, 52 w/e 14.06.20



100% RECYCLED PLASTIC BOTTLES BY THE END OF 2022*



To find out more about our work
towards a more sustainable planet
visit www.britvic.com

Coca-Cola European Partners

Adapting to change

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Diet Coke
Coca-Cola zero sugar
Coca-Cola Energy
Coca-Cola Signature Mixers
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Dr Pepper
Sprite
Lilt
Schweppes
Schweppes Signature
Collection
Monster Energy
Relentless
Powerade
Reign Total Body Fuel
Fuzetea
Costa Coffee
Oasis
Capri-Sun
Glacéau Smartwater
Abbey Well

“2020 has been an unprecedented year and we have taken our responsibility as a leading supplier seriously, giving back to the communities in which we operate through product and financial donations to the frontline and the vulnerable, and responding quickly to the diverse needs of our customers,” says Simon Harrison, vice-president, commercial development at Coca-Cola European Partners GB.

“During this time, we haven’t lost sight of our focus on sustainability and are committed to helping the country ‘Build Back Better’. All plastic bottles across our core brands in GB are now made with 50% recycled plastic.

“We’ve had to adapt quickly to meet changing shopper behaviours. Demand for large PET formats and multipacks of cans and glass bottles soared, as consumption moved almost entirely into the home. These packs continue to deliver strong growth across our lines¹.”

Big brands that are familiar to consumers have provided reassurance during these uncertain times, he adds. “In grocery and convenience, Coca-Cola continues to drive growth, led by Coca-Cola zero sugar²; Schweppes is helping shoppers recreate mixed drink experiences at home and is the fastest-growing major mixer brand³; and Monster continues to be the driving force in energy, delivering double-digit growth with its multipacks, zero sugar and flavoured variants⁴”.

CCEP’s new products have brought excitement to the category, tapping into shopper demand for flavour innovation and low- and zero-sugar variants, he says. “By mid-year, Diet Coke Sublime



“Big brands that are familiar to consumers have provided reassurance during these uncertain times”

Lime, Fanta Zero Raspberry and Monster Ultra Paradise were already worth a combined £7m⁵, providing affordable little lifts to shoppers.”

Investment in marketing and in-store activation has continued, he adds. “We’ve maximised the way consumers are now enjoying Premier League games with an on-pack promotion across sharing packs of Coca-Cola original taste and zero sugar – giving away new-season shirts instead of matchday experiences. For Monster, a new Halo Infinite on-pack partnership taps into the growth of gaming.”

In addition, CCEP has never lost sight of its commitment to hospitality customers, he notes. “To help them reopen in the summer we put together a £20m package of support, including marketing spend and the creation of the Coca-Cola Community Pub Fund, rewarding outlets that supported their communities during lockdown.

“With Christmas around the corner, we’ve got millions of festive sharing packs of the Coca-Cola range on their way, the return of our iconic ‘Holidays are Coming’ TV ad, and a limited-edition Coca-Cola zero sugar Cinnamon variant. However, expect some new news soon!”



Source

¹⁵ Nielsen (Home Channel),
Value MAT total GB to
13.06.2020



Holidays are Coming



- Large sharing packs* of Coca-Cola™ are **growing by 20%****
- **Stock up on Coca-Cola festive packs** to take advantage of increased at-home consumption occasions
- **Multi-Million pound** Coca-Cola Christmas campaign for 2020

TO FIND OUT MORE EMAIL CONNECT@CCEP.COM OR CALL 0808 1 000 000

#holidaysarecoming

*Includes Large PET bottles, multi-pack cans and multi-pack glass bottles ** Nielsen (Home Channel) Total Coverage Value MAT w/e 13.06.20 © 2020 The Coca-Cola Company. All rights reserved. COCA-COLA is a registered trade mark of The Coca-Cola Company.

Crediton Dairy

Arctic keeps its cool in 2020

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KEY BRANDS

Arctic Coffee, available in the following variants:
Café Latte
Caramel Latte
Skinny Latte
Mocha

As for most brands, 2020 has not turned out as expected, says Crediton Dairy. “Marketing plans were quickly reviewed and rewritten several times as we closely monitored the events unfolding,” it says. “At the start of this year we didn’t expect to be running a successful TV campaign on Channel 4 or to have seen our social media numbers more than double.

“The TV advertising was an opportunity that was presented to us with the help of Channel 4’s Greenhouse fund and was an offer we could not refuse. After a quick turnaround on the production of an advert for the brand, we launched the three-week TV campaign that targeted our 16- to 34-year-old consumers. The advert was well received by our target audience and there has been an increase in brand awareness and sales following the activity. This all adds to the positive story around Arctic Coffee as it continues to grow at 32% year-on-year (YOY)¹, above the growth seen in the iced coffee category (+21% YOY).

“Of course, there have been challenges this year, but overall we take many positives from 2020, along with invaluable lessons on the importance of communication, positivity and that people really do love iced coffee.”

Crediton says it was extremely fortunate that its NPD plans for 2020 were always to introduce a 1L format, so the company was ready to deliver this product as soon as the range review windows opened. “Without doubt, it has been the biggest success for Arctic Coffee this year and with 78% of its sales proven to be incremental to the iced coffee category², it continues to deliver excellent results for retailers,” says the



“Of course, there have been challenges this year, but overall we take many positives from 2020”

firm. “Initially launching the signature Café Latte into Co-op followed by Tesco, we have also since introduced the ever-popular Caramel Latte, which is listed alongside Café Latte in Sainsbury’s stores. For a time when consumers are at home more than ever before, the larger formats have proven to be very popular, appealing to a different usage occasion rather than stealing from the on-the-go solution.”

Crediton adds that the launch of its new 1L cartons have been well-supported, utilising a range of social, online and in-store media. “Social media has been a successful tool for us to increase awareness around product launches and in-store promotions, which ultimately helped to drive retail sales,” it says. “This year we have also maintained our sampling activity, but rather than carrying out face-to-face sampling at events – as we had originally planned – we worked with a range of agencies to ensure our routes to consumers were safe and in line with any restrictions. We also took the opportunity to offer support to frontline NHS staff at the start of the pandemic, donating 25,000 Arctic Coffees to help keep them going and give them a well-deserved pick-me-up.”



Source

1 IRI, Total Coverage Value Sales, 52 w/e 6 September 2020
2 Retailer loyalty data to 29 September 2020

EXTREME... LY POPULAR

The most frequently purchased iced coffee*



Follow @arcticicedcoffee
arcticicedcoffee.co.uk



* Arctic has been purchased most frequently in the last year & during the peak Summer month (Source: Source: Kantar 52we 9th August 2020)

Fentimans

Success amid turbulence

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 Fentimans Rose Lemonade
 Fentimans Premium
 Indian Tonic Water

“Undoubtedly the biggest challenge we have faced as a business over the past 12 months has been the Covid-19 pandemic,” says Ian Bray, CEO at Fentimans. “It has created both challenges and opportunities across all channels on a scale that we’ve never experienced before. With the closure of the out-of-home market during lockdown, we saw increased spending in grocery and online channels and had to quickly adapt to meet this change in demand. Effectively managing our supply chain has been critical to seeing us succeed during this turbulent period.

“On the flip side, an area of real opportunity has been the growth of online during the last six months which has catapulted our e-commerce strategy and allowed us to share learnings with our international partners who are experiencing similar market conditions. We’ve closely followed shopper behaviours throughout the pandemic and have had to flex our offering and marketing strategy in a way that meets the needs of the consumer during this ongoing period of uncertainty.

“Continuing to meet the needs of the Covid-19 consumer as we navigate through winter 2020 and into next year will be key to gaining new shoppers and growing the Fentimans brand both in the UK and internationally.”

New soft drinks line

At the back end of 2019, Fentimans launched a new range of soft drinks to meet the needs of the health-conscious consumer. The Fentimans Light range offers fewer calories (less than 60 calories per bottle), but with the same authentic Fentimans flavour that consumers expect from the brand,



“The growth of online has catapulted our e-commerce strategy”

says Andrew Jackson, marketing director at Fentimans. “Health is of growing importance to a large group of consumers and this has only accelerated with the recent Covid-19 pandemic. This will be a growing category over the next few years and one we’ll be keeping a close eye on.”

Unique branding

The Fentimans brand was first established in 1905 and the company’s glass bottle is an evolution of the original stone jars used to deliver the Fentimans drinks back then. “This, alongside our Fearless dog logo, means our bottle and branding are unique and create instant stand-out on shelf,” explains Jackson. “We are also proud of our unique flavours like Rose Lemonade, which offer something different to the standard drinks found in the soft drinks aisle and to those consumers who are constantly seeking new and innovative flavour profiles.”

Jackson says Fentimans is continuing to work closely with its retail and on-trade partners with the aim of bringing new consumers into premium soft drinks and mixers, and growing the overall category. “We have a strong and focused plan for 2021, which will see the Fentimans brand come to life both above-the-line and within the retail and on-trade environments.”

It's
raining

it's
pouring

we're
botanically
brewing

Lots of rain means lots
of juice, which we
blend, infuse and balance
to create our unique
range of flavours.

Pass us a brolly.



Grenade

Better for you demand

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KEY BRANDS

Grenade
Carb Killa
Energy

➔ The need for healthier products is more apparent than ever, with two-thirds of people admitting they're trying to lower their sugar intake¹. "With more and more shoppers actively looking for low-sugar alternatives, any healthier soft drinks range should include Grenade's Carb Killa high-protein, low-sugar Shakes, as well as Grenade Energy," says the company. "From the UK's No.1 best-selling protein bar brand², Carb Killa Shakes provide ultimate guilt-free indulgence, with six delicious flavours all packed with protein and low in sugar. Meanwhile, Grenade Energy, filled with functional ingredients such as branched-chain amino acids (BCAAs), electrolytes and vitamins, all sugar- and calorie-free, offers a refreshing, natural energy kick."

Shake it up

As shoppers switch to 'better for you' options, it's important to acknowledge the key drivers behind their purchase behaviour, such as taste and health, which Carb Killa Shakes are perfectly placed to meet, it says. "Carb Killa offers a tasty, indulgent, guilt-free treat, given its fantastic nutritional profile, with up to 25g protein per 330ml shake and low sugar across the range."

Best-served chilled, Carb Killa Shakes belong within a store's chiller to ensure the customer can enjoy them at their best. "With many chillers occupied by high-sugar, high-calorie dairy options, it's important for retailers to recognise this no longer reflects the changing demands of the category. Providing space for leading protein shake range Carb Killa offers customers the choice of a low-sugar alternative that does not compromise on taste, warranting space next to its high-sugar competitors."



“As shoppers switch to ‘better for you’ options, it’s important to acknowledge the key drivers behind their purchase behaviour”

Energy lives here

Packed full of BCAAs, added vitamins and electrolytes, Grenade Energy offers a refreshing fruity taste with zero sugar and calories. "It is the perfect drink for anyone looking to power through their day without any nasties," says the company.

"The functional ingredients provide additional benefits to the consumer beyond those found in typical energy drinks on the market. With BCAAs and electrolytes providing the perfect recovery formula, teamed with a hefty 155mg per 330ml serving of caffeine, Grenade Energy is the complete functional drink.

"With diet stimulation drinks growing above the market level⁴, Grenade Energy is perfectly placed to offer the consumer who is looking for a healthy alternative to their regular energy drink choice, a functional, refreshing product to enjoy," it adds.

"Chilled is the best way to enjoy Grenade Energy, so it's important for retailers to make space in their chillers to offer the consumer the product at its best. Creating a range of functional energy drinks in your chiller provides choice and a 'better for you' option that shoppers are looking for."

Source

- ¹ Market Measures Online Consumer Survey, July 2020
² IRI Marketplace, Total UK Market, Grenade Carb Killa, Value Sales, 52 w/e to 09.08.20
³ IGD, January 2020
⁴ Kantar, June, 2020
⁵ IGD Research, October 2019

NATURAL ENERGY DRINK

 ZERO SUGAR, ZERO CALORIES

 ADDED BCAAs, ELECTROLYTES & VITAMINS



BOOST + RECOVER



HIGH PROTEIN,
LOW SUGAR

 OVER 25G PROTEIN PER SHAKE

 LESS THAN 200 CALORIES PER SHAKE

GRENADE[®]

FUNCTIONAL, LOW AND ZERO SUGAR DRINKS

BEST SERVED CHILLED

HELL Energy Drinks

Hell extends global reach

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HELL Apple
HELL Red Grape
HELL Active
HELL Zero
HELL ENERGY COFFEE Latte
HELL ENERGY COFFEE Cappuccino

Since its brand launch in 2006, Hell Energy Drinks has continued to expand and grow its presence in multiple markets. The company now operates in 50 countries across five continents and has achieved market leader position in 10 countries¹ making it one of the world's largest energy drinks brands.

"We own our own stable brand, a state-of-the-art aluminium can factory, and energy drinks filling factory, a fully automated warehouse and logistics network," says UK country manager Michael Edwards. "The plant received the award for Most Efficient Production Support at the annual Factory of the Year Award in 2019, organised by Hungarian magazine Gyártás Trend, and was one of Europe's best three factories in the Global and World Class Manufacturing category. Production adheres to FSSC 22000 food safety regulations."

All Hell products are pasteurised, are without preservatives, and are served in aluminium cans that, from January 2021, will have at least 75% recycled content and which are 100% recyclable.

Iced coffee NPD

In 2020, Hell added an iced coffee manufacturing and filling factory to its production site, taking overall investment in its infrastructure to £278m since 2011. "This has allowed us to expand into a different category and consumer space while maintaining the core principles and values of Hell Energy," says Edwards. "Our Latte and Cappuccino coffee variants offer consumers a great-tasting, premium product at an affordable price."

In traditional energy drinks, the 2020 launch of its Zero variant, Classic but without sugar, has allowed the



"This year, Hell added an iced coffee factory to its production site, taking its overall infrastructure investment to £278m since 2011"

consumer to continue to enjoy Hell beverages whatever the occasion or their desired need, says the firm.

These launches, coupled with organic growth and the success of its existing range, has positioned Hell for double-digit year-on-year increase this year vs. 2019, with a sustainable growth trajectory into 2021 and beyond, adds Edwards.

To further enhance the products' visibility and credibility, Puerto Rican actress and model Zuleyka Rivera has joined famous American actor Bruce Willis as brand influencers and can be found on the company's brand assets, from in-store POS to digital ads. "Adding these globally recognised celebrities to our core look and branding has allowed us to be disruptive and recognisable at point of purchase."

Cofilling service for private-label

As a leading brand owner, Hell also has the knowhow to offer a premium-quality, prompt and reliable cofilling service, with on-time delivery for large orders, says Edwards. "Due to the latest available technology, we can work at competitive prices and supply even the largest chains with energy drinks, carbonated soft drinks, iced teas and milk-based beverages."



Source

¹ Nielsen, global data

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NOCO

Are you Nocco enough?

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KEY BRANDS

NOCO

 Nocco, a functional energy drink created in Sweden, is available in more than 5,000 locations throughout the UK. Launched in 2018 in gyms, Nocco has continued to expand across sport & fitness, retail and convenience. Aiming to capitalise on the demand for great-tasting, on-the-go sports nutrition products, Nocco is a market leader in the performance energy category and is now the fastest-growing energy drink in the UK¹, says country marketing manager Carlotta Cattalani.

Nocco's 2020 range features nine flavours, including three summer editions and two caffeine-free BCAA+ varieties, all of which provide benefits that support an active, healthy lifestyle, explains Cattalani. "All Nocco products are sugar-free and enriched with vitamins and BCAA (branched-chain amino acids) to enhance muscle recovery," she says. "One can of Nocco contains five different types of Vitamin B (folic acid, niacin, biotin, B6 and B12), to help reduce fatigue and exhaustion and contribute to maintaining normal energy metabolism, plus vitamin D, which contributes to maintaining normal muscle function. Core products in the Nocco range contain 180mg of caffeine and 3,000mg of BCAA, while the caffeine-free variants contain 5,000mg of BCAA."

Connection through community

"2020 has created unforeseeable challenges for brands and has reshaped consumers' behaviour," adds Cattalani. "However, new challenges also bring new opportunities to engage with existing, loyal customers and potential new audiences. Many people have sought new ways to exercise at home via virtual workouts in an effort to stay



“New challenges also bring new opportunities to engage with existing, loyal customers and potential new audiences”

active and healthy, while also needing positive motivation. We arranged Zoom and Instagram live workouts, led by Nocco UK ambassadors – ensuring we stayed connected even when apart. As a result, our social media following has grown by 50% during 2020.”

A taste of summer

Even though this summer was unusual, the firm launched Nocco Limón del Sol, a new citrus-inspired summer flavour, invoking memories of Spanish summers, it reveals. "Our messaging across social media centred around Nocco Limón Del Sol as the perfect Mediterranean coast escape in a can. As the fourth in the Summer Edition series – following Tropical, Caribbean and Miami – Limón del Sol saw strong sales and is already the number one selling flavour across the range," she adds.

The future is functional

"In a year of uncertainty, the need for that get-up-and-go attitude to life is greater than ever," says Cattalani. "As a brand that promotes a mentality of determination and ambition, we encourage you to be the best version of yourself. Only question is, Are you Nocco enough?"



Source

¹ ACNielsen, GB Total Coverage, Latest 52 w/e 19.09.20



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Red Bull

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KEY PRODUCTS

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

Red Bull wants to enable, inspire and challenge people to do more with their time and talents, says Andrew McQuade, off-premise sales director. “As the ethos of our business, this is embedded at the core of all of our awareness driving activity.

“In this spirit, we kicked off 2020 with ‘New Year New Challenge’, a campaign inspiring and enabling people to increase their training and even take on one of Red Bull’s unique sporting challenges to help reach their 2020 fitness goals. Following this, we most recently launched Red Bull Pro – an evolution of the successful Red Bull Project Pro in 2019 – which saw Red Bull athletes, including Ben Stokes and Jack Nowell, immortalised on nearly 80 million Red Bull cans. This year the campaign focuses on inspiring people to think and train like professionals, showing how Red Bull athletes prime themselves to reach their fitness goals.”

Early this summer Red Bull Race To the Moon encouraged runners across the UK and Ireland to run 1.5 million miles in 28 days, racing the Moon around the Earth over the course of a lunar cycle in a new challenge on Strava. “The campaign saw 127,000 participants worldwide running a total of 7.6 million miles,” reveals McQuade.

NPD boost

Red Bull says its new products and in-depth energy category knowledge aim to help retailers boost sales and encourage more shoppers to enter the category.

This October, its latest campaign, Red Bull Air Mail, is a promotion on Red Bull Energy Drink 250ml 4-packs in the impulse channel, launching to wider grocery this November. “Red Bull Air Mail can be found in-store via the limited-edition sleeve on Red Bull Energy Drink 250ml 4-packs. Once opened, the inside of the pack becomes a postcard to sample a friend or family member, who can then enter a code online to redeem a 4-pack for themselves,” says McQuade. “With the value of Red Bull multipacks growing by 42.9% in the latest half year¹, now



“This year, our campaign focuses on inspiring people to think and train like professionals”

is the perfect time for retailers to stock up. Responding to consumer trends Red Bull is aiming to drive a better understanding of the brand for multiple moments of need, such as sports & fitness, work & study, socialising, and travel.”

Red Bull Zero was relaunched in early 2020 with a reformulated taste profile, responding to shopper demand for a great-tasting energy drink without sugar. “Red Bull Zero has been extremely well received in trade and by shoppers, as it enters one of the fastest-growing segments in soft drinks,” says McQuade. Red Bull Zero will also be offered in a 250ml 4-pack from autumn, following shopper demand.

Red Bull also revealed in October that its Watermelon Summer Edition, launched this July, will be made a permanent SKU, extending the existing Editions range, and will be renamed ‘Red Edition’.

Brand stand-outs

With the fourth-largest absolute gain on any FMCG brand in 2019³, Red Bull continues to drive growth in the market. “Despite changes in shopper behaviour, the brand saw sales rise by £13.4m vs YTD last year⁴. Shoppers are putting more Red Bull in their baskets, more frequently and we will continue to support positive category growth in 2021.”

**Sources**

- 1 Nielsen, Value Growth - Red Bull, Total Coverage, Data 26 w/e Aug 2020
- 2 Nielsen, Unit Sales, 1st launch month, 2020
- 3 The Grocer, Britain's Biggest Brands - Nielsen 52 w/e 31 December 2019
- 4 Nielsen, Value Sales YTD 2020 vs YA

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Red Star Brands

Gutsy move for kombucha

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KEY BRANDS

The GUTsy Captain

➔ Kombucha has been one of the runaway successes in the soft drinks category in recent years, as shoppers who are focused on health and wellbeing, reach for the functional benefits of the beverage. They are also attracted by the flavour choices and innovation that brands like The Gutsy Captain have brought to the category.

The range – in six flavours including Original, Ginger & Lemon and Raspberry, offered in 400ml and 1L bottles and a 250ml can – is available in multiple, health and convenience retailers. “The founders’ vision was to create the best-tasting healthy drinks, giving everyone the choice of a healthy, natural and organic option without compromising on taste,” says the brand’s chief marketing officer, Inês Freitas. “As an alternative to fizzy drinks, fruit juices and alcohol, The Gutsy Captain has just launched a zero-sugar and zero-calorie line in response to strong consumer demand. These have the same gut health benefits as traditional kombucha.”

While appealing to consumers who want lower levels of calories and sugar, the new range remains 100% kombucha and is created in the same traditional and authentic way, while still delivering the delicious taste that consumers have come to love about The Gutsy Captain drinks, she says.

“Kombucha already fits into the functional drinks category, so by making it accessible to even more consumers by lowering the sugar and calories with Zero, it’s a strong and relevant innovation and answers a key need established by consumers.”

One of only two impulse soft drinks



“Our challenge for 2020 was to broaden the appeal of the kombucha category”

sub-categories in growth during 2020, kombucha is now estimated to be worth £7.4m¹ in the UK in the L52Wks, with growth rate of 75%¹ YOY.

A small, but growing proposition with a huge opportunity, there is still a need to develop kombucha as a mainstream proposition in the UK, adds Inês Freitas.

“Our brand purpose has always been to inspire and help consumers make better life choices that will give greater health benefits. Our challenge for 2020 was to broaden the appeal of the category to continue to make it more mainstream and ensure that consumers reach for kombucha intuitively. The ambition for the brand is to ultimately replace soft drinks and, to achieve this, we create innovative NPD with new formats and flavours, focus on consumer education about the importance of gut health, and promote tasting. Those who try The Gutsy Captain kombucha love it and become fans of our brand.”

This year, The Gutsy Captain Kombucha Original and Ginger & Lemon both won taste awards in The Aurora International Taste Challenge, and Coconut was awarded one star in the 2020 Great Taste Awards.

“With further flavour launches, including Pomegranate and Watermelon & Mint, planned later this year, alongside the new Zero range, the brand’s proactive UK growth strategy is to build The Gutsy Captain in the hearts of their core community.”



Source

[1] IRI Marketplace, data to 06.09.20 (Filtered to Impulse Soft Drinks)

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Refresco Drinks UK

Looking ahead to 2021

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Old Jamaica
Ocean Spray
Emerge
Mr Freeze
Sunny D
Del Monte
SUSO
MacB
Ben Shaws

➡ This year the soft drinks industry has faced more challenges than ever. However, Refresco says it has remained focused on delivering naturally healthier drinks without compromising on taste – all the while investing in its hero brands and developing strong growth opportunities for 2021 and beyond.

The company's soft drink capability covers all sectors from mixers to functional energy, juice drinks to pure juices, and CSDs to water, with most things in between. And with leading brands such as Old Jamaica and Mr Freeze dominating their respective categories¹⁺³, the priority for Refresco is making drinks even tastier, healthier and more sustainable, reveals the company.

Ongoing investment and NPD

Refresco consistently invests in new production options and techniques and 2021 will be no different, it says, with new a manufacturing footprint for the UK's No.1 freezable brand¹, Mr Freeze, coming online. This investment in long-term UK production and the British economy also brings benefits to the Mr Freeze brand, including a cleaner ingredient declaration with no requirement for preservatives, bringing the nation's favourite freeze pop brand well and truly into the 21st century.

James Logan, commercial director at Refresco, adds "This year, more than ever, has proven the value of British manufacturing. We know Mr Freeze has 80% market share² in the freezables category and this new investment will us build on this and make the brand more appealing, as well as securing its future for years to come."

As consumers look for more affordable



“The freezables category offers huge potential as it meets parents’ needs for a low-cost low-sugar tasty treat”

snacking options, the freezables category offers huge potential as it meets parents' needs for a low-cost, low-sugar, tasty treat, adds Logan.

Meanwhile, the UK's No.1 Ginger Beer brand³, Old Jamaica, also has some exciting plans for 2021, including a rebrand, a new consumer campaign and the launch of new soda flavours. After significant investment in consumer research in 2020 for the Old Jamaica brand, the consumer campaign is aimed at amplifying the classic fiery taste of Old Jamaica.

In the energy & sports sector, the company's Emerge brand will also be given a fresh new look in 2021, designed to further the development of the brand in the wholesale sector.

The nostalgic taste of Sunny D will also be available as an ambient product next year, reveals Refresco, which hopes this will increase its appeal and open new stocking opportunities across the out-of-home sector.

"The Sunny D brand has fantastic potential because it brings back so many happy memories for lots of people," says Logan. "It now has only 20 calories per serving and delivers 50% of your daily Vitamin D requirement, delivering against Refresco's ongoing objectives to deliver healthier and more sustainable soft drinks."



Source

1 + 2 IRI, Total Freezables Category Performance, Value, 24 w/e 09.08.20 (excl discounters)
3 IRI, Volume Sales, MAT to w/c 06.09.20

Refresco

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Juice

EMERGE
ENERGY DRINK

M&B

BEN SHAW'S
EST. 1871

ting

Mr. Freeze

Starbucks Coffee Company

Starbucks scents RTD opportunity

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KEY BRANDS

Starbucks

Source

¹ Mintel, 2020
^{2,3,4,5} Nielsen, Total Coverage
MAT to 05.09.20

Ready-to-drink (RTD) coffee is a relatively new concept for the soft drinks category, but as one of its fastest-growing sectors, at 19.5% MAT, and with a prediction to grow at a minimum 15% CAGR across the next three years¹, it offers a huge opportunity for retailers.

According to the latest data, Starbucks is now the biggest iced coffee brand³, accounting for 48.5% of sales, and the biggest dairy drinks brand in the UK⁴.

“Starbucks is a trusted coffee brand that signals high-quality RTD coffee on-shelf and is aware of consumers’ changing preferences, including the growing demand for plant-based options, as well as the need for an increased caffeine hit to get through intense days,” it says. “The Starbucks RTD range now features Almond Plant-Based Iced Coffee, Coconut Cocoa Cappuccino, Oat Vanilla Macchiato and its most intense Doubleshot versions yet: Intenso Black and Intenso Dark with a splash of milk.”



“As one of the fastest-growing soft drinks¹, ready-to-drink coffee offers a huge opportunity”

During this year’s pandemic, iced coffee has seen a shift in how consumers shop the category, it adds.

“While iced coffee has mainly been sold in a single-serve format, as it becomes more established, consumption habits are expected to align to the total soft drinks category, where 63.6% of value sales come from multi-pack or multi-serve offerings⁵.”

chilled coffee

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*Nielsen Total Market Snack Bars 52 weeks to 11/07/2020



YAZOO

Adding flavour to the milk market

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KEY BRANDS

YAZOO
Chocomel
Barista

“We know that our limited-edition flavours are a huge driver of sales, that’s why we launched our third this year – Choc-Hazeliicious,” says FrieslandCampina. “The drink, made available in 400ml and a new 1L format for the first time, was developed to be suitable for nut allergy sufferers.”

The company’s Chocomel brand also saw a number of new launches this year, from the UK-exclusive 12-pack tray to the 1L pack. “Not only did distribution of the 250ml Chocomel can grow, but the 1L carton, made from sustainable materials, catered to the shift towards the in-home occasion, which has been key for our recent sales,” it explains.

During times like these, shoppers looking for comfort food are more likely to choose a brand already firmly in their repertoire, says the company. “Yazoo’s reputation speaks for itself, and Choc-Hazeliicious’ instantly recognisable trademark bottle design,



“Our limited-edition flavours are a huge driver of sales”

paired with the flavour’s vibrant colours, helps the drink stand out.”

A large shopper campaign to support Chocomel went live in Tesco in September and October. Meanwhile, its limited-edition Choc-Hazeliicious range was supported with in-store POS, with listings in Tesco, Asda and Sainsbury’s featuring digital and a location programmatic campaign.



FrieslandCampina www.frieslandcampina.co.uk

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Suntory Beverage & Food GB & Ireland

Innovation and agility

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Lucozade Sport
Lucozade Revive
Ribena
Orangina
MayTea

➔ Suntory Beverage & Food GB&I has a track record of doing the right thing. Over the past five years the company has focused on the Suntory vision of 'Growing For Good', which reflects its ambition to grow as a company while helping to benefit the community as it does so.

Brand agility

"We have adapted quickly to changing shopper missions to ensure we can meet increased demand for new formats while continuing to add exciting innovation into the market," says the firm. "Our ability to shift focus quickly means retailers have been able to meet increased demand for multipacks and larger-format drinks during the Covid-19 pandemic."

A great example, it says, is Ribena Sparkling, which went from concept to execution within just 12 weeks, "demonstrating our speed and ability to deliver innovation and excitement to the market in the right format". Ribena Sparkling Blackcurrant comes in 500ml, 2L and 6x330ml multipack cans, while Ribena Sparkling Raspberry is available in 500ml and 2L formats.

"We have also continued to promote our biggest brands with innovative marketing campaigns, including the Cherry Kick Challenge to support the launch of new Lucozade Sport Cherry Kick," it says. "We also launched a new 'golden bottle' promotion for Lucozade Energy, with 50 golden bottles hidden in Orange, Original, and Zero Pink 6x380ml multipacks."

Health and wellbeing

All of its brand work supports the company's health and wellbeing activity, as well as helping consumers, colleagues and communities to make healthier drinking choices and to lead more active lives, it says.

"We have reduced sugar in our drinks by 57%, achieving an average sugar content of 3.7g per 100ml, and are committed to launching new core drinks with no more than 4.5g per 100ml."

"During the Covid-19 crisis we have continued this focus, delivering 107,000 cases of our lower-sugar drinks to NHS



“Ribena Sparkling went from concept to execution within just 12 weeks”

frontline workers and vulnerable adults. To help with increased demand from food banks and community groups during lockdown, we donated 32,000 cases to FareShare and FoodCloud.”

Driving sustainability

Suntory Beverage & Food also plans to move to using only 100% sustainable plastic bottles by 2030. This ambitious step forward is part of a wider 2050 environmental vision, and its aim to achieve net zero greenhouse gas emissions across its entire value chain.

"Our journey to 100% sustainable bottles includes removing unnecessary and hard-to-recycle plastic wherever possible," it says. "The Ribena brand is the perfect case study: Ribena Squash and Ribena 500ml bottles are made with 100% rPET and the brand will also undergo a major redesign, ensuring its bottles are fit for bottle-to-bottle recycling, before the end of the year. In September 2020, Ribena became the first major UK juice brand to introduce a paper straw to its drinks cartons."

"While Covid-19 has disrupted many areas of the market, we've continued to strengthen our focus by adding innovative new drinks to our portfolio while continuing to drive forward with our ambitious sustainability and health and wellbeing plans."

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Upbeat Drinks

Relentless pursuit of NPD

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KEY BRANDS

Upbeat Drinks

↙ Upbeat Drinks says the seismic overnight shift in the brand's consumer behaviour, from on-the-go to at-home posed its biggest challenge in 2020. "Our drinks naturally complement a protein boost in the gym and wider nutritional benefits on-the-go," it says. "With speed, we needed to adapt our brand, our drinks and our communications to ensure our Upbeat consumers stayed with us.

"In just one month, we launched a multipack version of our signature Juicy Protein Water to address less frequent, bigger basket shops. We also switched from working with Amazon as a seller to becoming a vendor, providing a smoother online shopping experience. We recognise that our consumers are now demanding more from their online shopping with ease of fulfilment, quick navigation and choice."

An additional success for 2020 has been the company's relentless pursuit of NPD, it says. In February, Upbeat launched its World First Juicy Sparkling Protein Water range in two flavours. "Following the success of the natural plant-based sweetener in the new launch, we reformulated our signature Juicy Protein Water range to match the natural ingredients and increase the level of B-Vitamins," adds Upbeat. "And finally, recognising the shift to at-home and the growth of the renewable agenda, we have just launched a range of Refreshing Juicy Protein Powders, available in four flavours."

2020 has been a defining year of innovation for Upbeat, it says. "We targeted complete naturalness and sustainability. Primarily, we saw some excellent innovation on plant-based, natural sweeteners, so reformulated our signature Juicy Protein Water



“We saw some excellent innovation on plant-based sweeteners, so reformulated our signature range”

range. Simultaneously, we switched to an aseptic production line, enabling us to remove preservatives and claim 'all natural'. Further, we took the opportunity to launch a new flavour – Orange & Passion Fruit."

Two new Upbeat product ranges were also launched. In February, a "world-first" arrived in the form of Real Fruit Sparkling Protein Water, it says. In two flavours, this includes different functional benefits such as high in B-Vitamins and natural energy. "This month, we also launched four clear whey isolate Protein Powders, which are already seeing excellent success in online channels," it says.

"Our Sparkling Protein Water range addresses consumer need states at point of purchase. By calling 'Daily Boost' and 'Natural Energy' out on front of pack, we are giving the consumer a choice of how they shop Upbeat – through flavour and/or need state.

"Due to the premium ingredients in all Upbeat drinks, the brand commands a higher retail price, thus representing strong incremental category value for buyers, even on promotion," it adds. "As the world responds to Covid-19 with price reductions, Upbeat will continue to promote but hold its functional and wellness value for consumers."

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A close-up photograph of a vibrant green salad, likely spinach, topped with bright red pomegranate seeds and small, light-colored seeds. The image is partially obscured by the large white text of the headline.

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KEY BRANDS

Zuddha Alkaline Water

➡ Zuddha Alkaline Water is a new entrant into the bottled water market and has developed a five-step purification process for its brand. At its heart are three bespoke distillers; after distillation bio-ceramic filtration adds alkaline minerals to give a pH of +9.0.

Co-founder Peter Mayes says: “Bringing this brand to life has been quite a journey. We offer one product in one bottle size, in one format (glass). As co-founders, Bobby and I found it curious that water is often overlooked in health and wellbeing, as it’s vital – 99% of the molecules in our body are water molecules after all.

“Alkaline water is a fast-growing sector in other countries and has been linked to many health benefits,” he explains. “We purify our water using three bespoke distillers – replicating the rain water cycle – and remove impurities. It then runs through a series of filters to add alkaline minerals and change the oxidation reduction



“Alkaline water is a fast-growing sector and has been linked to many health benefits”

potential (ORP) level. We only pack in glass, given the issues around micro-plastics and the environment.

“It is now known that water can hold vibrations and these can affect the molecules’ crystal structure. Science refers to this as The Fourth Phase of Water. We incorporate this into our process; you’ll be able to taste and feel the difference drinking Zuddha.”



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Daily Mail, July 2020

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