In line with its European colleagues, the British Soft Association commissioned food, drink and retailing data analysts Canadean to produce its 2017 report.

The key strength of Canadean’s methodology is that works in industry partnerships across the value chain, from suppliers to brand producers and both on- and off-premise channels.

The research is built from brand data upwards. The ‘brick-by-brick’ approach ensures that the research gives insights from all angles; from brand volume through to corporate volume, flavour segmentation, packaging splits and channel distribution.

The companies featured in the company profiles and those whose brands are featured in the individual market categories are selected through regular market observation based on the size of their output and/or their dynamism.

Sources

- Official production and trade statistics
- Face-to-face interviews with leading soft drinks producers
- Interviews with retailers, distributors and associated industries
- Consumer surveys
- Quarterly monitoring of product offered in all trade channels in selected markets

The soft drinks industry continues to lead the way in reducing sugar and calorie intake from its products and we hope to set a positive example to other parts of the food and drink sector of what can be achieved.
Sugar intake from overall soft drink consumption is down over 17% since 2013 (Source: Kantar Worldpanel)

**Definition**
Carbonated drinks, still and juice drinks, dilutables, fruit juices, bottled waters, sports and energy drinks.

---

**Overall soft drink consumption**

For the first time since 2014, the soft drinks market recorded a growth thanks to product innovation, premiumization, and investment in marketing strategies to align with the consumer trend of health consciousness.

- **Volume M litres**
  - 2011: 13,503
  - 2012: 13,321
  - 2013: 13,431
  - 2014: 13,358
  - 2015: 13,346
  - 2016: 13,522

- **Value M GBP**
  - 2011: 12,694
  - 2012: 12,971
  - 2013: 13,465
  - 2014: 13,655
  - 2015: 13,710
  - 2016: 13,801

- **YOY growth (%)**
  - 2011-2012: 1.7%
  - 2012-2013: -1.4%
  - 2013-2014: 0.8%
  - 2014-2015: -0.5%
  - 2015-2016: -0.1%

- **Litres per capita**
  - 2011: 213.4
  - 2012: 209.1
  - 2013: 209.5
  - 2014: 206.8
  - 2015: 205.0
  - 2016: 206.2

- **Value YOY growth (%)**
  - 2011-2012: 5.4%
  - 2012-2013: 2.2%
  - 2013-2014: 3.8%
  - 2014-2015: 1.4%
  - 2015-2016: 0.4%

- **Value per capita (£)**
  - 2011: 200.6
  - 2012: 203.6
  - 2013: 210.0
  - 2014: 211.4
  - 2015: 210.6
  - 2016: 210.5

---

**Calorie split**
1. No/low calorie - 58%
2. Regular - 38%
3. Mid calorie - 4%

**Category split**
1. Carbonated soft drinks - 38%
2. Dilutables - 21%
3. Bottled water - 20%
4. Still & Juice drinks - 8%
5. Fruit Juice - 7%
6. Sports & Energy drinks - 6%

**Packaging split**
1. PET/plastic - 72%
2. Metal - 11%
3. Carton - 6%
4. Glass/other - 6%
5. Dispense - 5%

---

Source: Canadean
## Bottled Water

<table>
<thead>
<tr>
<th>Year</th>
<th>Volume M litres</th>
<th>YOY growth (%)</th>
<th>Litres per capita</th>
<th>Value M GBP</th>
<th>Value YOY growth (%)</th>
<th>Value per capita (£)</th>
<th>Share of total soft drinks (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2011</td>
<td>1,879</td>
<td>1.4</td>
<td>29.70</td>
<td>1,099</td>
<td>5.3</td>
<td>17.6</td>
<td>13.9</td>
</tr>
<tr>
<td>2012</td>
<td>1,896</td>
<td>0.9</td>
<td>29.77</td>
<td>1,139</td>
<td>3.6</td>
<td>17.9</td>
<td>14.2</td>
</tr>
<tr>
<td>2013</td>
<td>2,022</td>
<td>6.6</td>
<td>31.55</td>
<td>1,251</td>
<td>9.9</td>
<td>19.5</td>
<td>15.1</td>
</tr>
<tr>
<td>2014</td>
<td>2,207</td>
<td>9.1</td>
<td>34.17</td>
<td>1,368</td>
<td>9.3</td>
<td>21.2</td>
<td>16.5</td>
</tr>
<tr>
<td>2015</td>
<td>2,407</td>
<td>9.0</td>
<td>36.97</td>
<td>1,485</td>
<td>8.6</td>
<td>22.8</td>
<td>18.0</td>
</tr>
<tr>
<td>2016</td>
<td>2,637</td>
<td>9.6</td>
<td>40.22</td>
<td>1,602</td>
<td>7.9</td>
<td>24.6</td>
<td>19.5</td>
</tr>
</tbody>
</table>

Source: Canadean

### Latest developments

Product innovation and marketing investment have allowed the water category to capitalise on the consumer health trend, resulting in bottled water sales increasing significantly.

### Company spotlight

Abbey Well unveiled a new design in 2016 with the launch of the twist bottle. The new bottle utilizes nearly a third less plastic than the previous design and has a new label which states "Recycle me".

### Definition

Still, sparkling and lightly carbonated, natural mineral waters, spring waters and bottled drinking waters packaged in sizes of 10 litres or below; water for coolers in sizes of 10.1 litres and above.

---

In 2016 bottled water sales increased by 9.6%
**Carbonates**

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Volume M litres</td>
<td>5,643</td>
<td>5,360</td>
<td>5,350</td>
<td>5,240</td>
<td>5,201</td>
<td>5,192</td>
</tr>
<tr>
<td>YOY growth (%)</td>
<td>1.9</td>
<td>-1.5</td>
<td>-0.2</td>
<td>-2.1</td>
<td>-0.7</td>
<td>-0.2</td>
</tr>
<tr>
<td>Litres per capita</td>
<td>86.0</td>
<td>86.1</td>
<td>83.5</td>
<td>81.1</td>
<td>79.9</td>
<td>79.2</td>
</tr>
<tr>
<td>Value M GBP</td>
<td>5,667</td>
<td>5,783</td>
<td>5,918</td>
<td>5,891</td>
<td>5,855</td>
<td>5,834</td>
</tr>
<tr>
<td>Value YOY growth (%)</td>
<td>4.8</td>
<td>2.1</td>
<td>2.3</td>
<td>-0.5</td>
<td>-0.6</td>
<td>-0.4</td>
</tr>
<tr>
<td>Value per capita (£)</td>
<td>89.5</td>
<td>90.8</td>
<td>92.3</td>
<td>91.2</td>
<td>89.9</td>
<td>89.0</td>
</tr>
<tr>
<td>Share of total soft drinks (%)</td>
<td>60.3</td>
<td>60.2</td>
<td>59.8</td>
<td>59.2</td>
<td>59.0</td>
<td>38.6</td>
</tr>
</tbody>
</table>

Source: Canadean

Sugar intake from carbonates is down 19% since 2013
(Source: Kantar Worldpanel)

**Definition**

Ready to drink carbonates, including draught and home dispense; regular, mid, low and no calorie; sparkling juices; cola; lemon including lemonade; lemon-lime; mixers including tonic and bitter drinks; orange; shandy; others including other carbonated fruit flavours, sparkling flavoured water, health drinks and herbal drinks.

**Calorie split**

1. Regular - 52%
2. No/Low Calorie - 43%
3. Mid Calorie - 5%

**Flavour split**

1. Cola - 60%
2. Lemonade - 7%
3. Orange - 7%
4. Tonic, mixers & bitters - 4%
5. Lemon/Lime - 4%
6. Others - 16%

**Packaging split**

1. PET/ plastic - 61%
2. Metal - 24%
3. Dispense - 12%
4. Glass - 3%

Latest developments

The carbonates category saw an increased focus and development of premium products, particularly on tonics, mixers and bitters.

Company spotlight

In 2016, 75% of Pepsi’s 2016 grocery retail sales were in no sugar cola varieties (Pepsi MAX or Diet Pepsi)
Dilutables

<table>
<thead>
<tr>
<th>Year</th>
<th>Volume M litres</th>
<th>YOY growth (%)</th>
<th>Litres per capita</th>
<th>Value M GBP</th>
<th>Value YOY growth (%)</th>
<th>Value per capita (£)</th>
<th>Share of total soft drinks (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2011</td>
<td>3,271</td>
<td>3.1</td>
<td>51.69</td>
<td>829</td>
<td>6.7</td>
<td>13.1</td>
<td>23.6</td>
</tr>
<tr>
<td>2012</td>
<td>3,194</td>
<td>-2.4</td>
<td>50.13</td>
<td>818</td>
<td>-1.4</td>
<td>12.8</td>
<td>24.0</td>
</tr>
<tr>
<td>2013</td>
<td>3,173</td>
<td>-0.7</td>
<td>69.49</td>
<td>855</td>
<td>6.5</td>
<td>13.3</td>
<td>23.6</td>
</tr>
<tr>
<td>2014</td>
<td>3,041</td>
<td>-4.2</td>
<td>67.07</td>
<td>832</td>
<td>-2.6</td>
<td>12.9</td>
<td>22.8</td>
</tr>
<tr>
<td>2015</td>
<td>2,882</td>
<td>-5.2</td>
<td>44.27</td>
<td>816</td>
<td>-1.9</td>
<td>12.5</td>
<td>21.6</td>
</tr>
<tr>
<td>2016</td>
<td>2,826</td>
<td>-1.9</td>
<td>43.1</td>
<td>798</td>
<td>-2.1</td>
<td>12.2</td>
<td>21.9</td>
</tr>
</tbody>
</table>

Source: Canadean

Definition
Squashes, cordials, powders and other concentrates for dilution to taste by consumers, expressed as ready to drink (RTD). Typically adding 4 parts water to 1 part product for single concentrates, 9 parts water to 1 part product for double concentrates and varying amounts for super concentrates with 50-70ml making 5-7 litres RTD.

Latest developments
No/low calorie products make up the biggest segment in the dilutables category (85%). The category also contributed to the second biggest drop (after still & juice drinks) in sugar and calorie intake, down 23.6% and 22.5% respectively.

Company spotlight
In a brand relaunch, Robinsons removed all full-sugar lines from its fruit squash and replaced them with ‘no added sugar’ variants.

Sugar intake from dilutables is down 23.6% since 2013
(Source: Kantar Worldpanel)
Only 8% of children and 29% of adults currently reach their 5-a-day. (Source: National Diet and Nutrition Survey)

**Definition**

100% fruit content equivalent, sometimes referred to as pure juice or 100% juice. Chilled juice comprises four main types: freshly squeezed juice; not from concentrate juice; chilled from concentrate (may be from concentrate or part from concentrate); smoothies. Ambient or long life juices are mainly from concentrate.

**Latest developments**

The UK Fruit Juice Health and Diet Quality Study found that fruit juice consumers have a lower BMI and waist circumference than non-consumers (correlation). The analysis also showed that contrary to concerns about over consumption of fruit juice, UK consumers (on average) are not consuming sufficient pure fruit juice to meet the 150ml portion which counts as one of the 5-a-day.

**Company spotlight**

Tropicana launched the Little Glass campaign, a multi-million pound marketing campaign focused on the nutritional benefits of fruit juice when consumed in moderation, supporting the recommended 150ml portion size.

---

<table>
<thead>
<tr>
<th>Year</th>
<th>Volume M litres</th>
<th>YOY growth (%)</th>
<th>Litres per capita</th>
<th>Value M GBP</th>
<th>Value YOY growth (%)</th>
<th>Value per capita (£)</th>
<th>Share of total soft drinks (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2011</td>
<td>1,180</td>
<td>-2.7</td>
<td>18.6</td>
<td>1,534</td>
<td>2.7</td>
<td>8.7</td>
<td>8.7</td>
</tr>
<tr>
<td>2012</td>
<td>1,144</td>
<td>-3.0</td>
<td>18.0</td>
<td>1,533</td>
<td>1.3</td>
<td>8.6</td>
<td>8.6</td>
</tr>
<tr>
<td>2013</td>
<td>1,079</td>
<td>-5.7</td>
<td>16.8</td>
<td>1,522</td>
<td>-2.0</td>
<td>8.0</td>
<td>8.0</td>
</tr>
<tr>
<td>2014</td>
<td>996</td>
<td>-7.7</td>
<td>15.4</td>
<td>1,445</td>
<td>-4.4</td>
<td>7.5</td>
<td>7.5</td>
</tr>
<tr>
<td>2015</td>
<td>948</td>
<td>-4.8</td>
<td>14.6</td>
<td>1,373</td>
<td>-5.7</td>
<td>7.1</td>
<td>7.1</td>
</tr>
<tr>
<td>2016</td>
<td>928</td>
<td>-2.1</td>
<td>14.2</td>
<td>1,357</td>
<td>-1.1</td>
<td>6.9</td>
<td>6.9</td>
</tr>
</tbody>
</table>

Source: Canadean
Still and Juice Drinks

<table>
<thead>
<tr>
<th>Year</th>
<th>Volume M litres</th>
<th>YoY growth (%)</th>
<th>Litres per capita</th>
<th>Value M GBP</th>
<th>Value YoY growth (%)</th>
<th>Value per capita (£)</th>
<th>Share of total soft drinks (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2011</td>
<td>1,051</td>
<td>-3.3</td>
<td>16.6</td>
<td>1,735</td>
<td>2.2</td>
<td>27.4</td>
<td>7.8</td>
</tr>
<tr>
<td>2012</td>
<td>1,016</td>
<td>-3.4</td>
<td>15.9</td>
<td>1,703</td>
<td>-1.9</td>
<td>26.7</td>
<td>7.6</td>
</tr>
<tr>
<td>2013</td>
<td>1,066</td>
<td>5.0</td>
<td>16.6</td>
<td>1,830</td>
<td>7.5</td>
<td>28.6</td>
<td>7.9</td>
</tr>
<tr>
<td>2014</td>
<td>1,103</td>
<td>3.5</td>
<td>17.1</td>
<td>1,883</td>
<td>2.9</td>
<td>29.2</td>
<td>8.3</td>
</tr>
<tr>
<td>2015</td>
<td>1,115</td>
<td>1.1</td>
<td>17.1</td>
<td>1,897</td>
<td>0.7</td>
<td>29.1</td>
<td>8.6</td>
</tr>
<tr>
<td>2016</td>
<td>1,135</td>
<td>1.9</td>
<td>17.3</td>
<td>1,926</td>
<td>1.6</td>
<td>29.4</td>
<td>8.4</td>
</tr>
</tbody>
</table>

Source: Canadean

Definition
High fruit juice (25-99% fruit content), juice drinks including juicy water (5-30% fruit content), other still drinks (0-5%) including iced tea, still flavoured water and non-fruit drinks.

Company spotlight
Britvic has stopped producing and selling added-sugar Fruit Shoot in the UK. Through reformulation and innovation, Britvic has removed 1,918 calories from its portfolio since 2012 on an annualised basis.

Sugar intake from still and juice drinks is down 26% since 2013
(Source: Kantar Worldpanel)

Latest developments
Sales of iced/RTD tea have increased steadily since 2014. Perceived as rich in antioxidants, the category appeals to the growing market of health-conscious consumers.

Calorie split
1. Regular - 57%
2. No/Low Calorie - 37%
3. Mid Calorie - 6%

Category split
1. Juice drinks - 49%
2. Still flavoured waters - 26%
3. High fruit juice - 17%
4. Juicy water - 6%
5. Others - 2%

Packaging split
1. PET/plastic - 67%
2. Carton - 20%
3. Foil pouch - 7%
4. Glass/other - 6%
In 2016, the UK sports and energy drinks market was worth over £2 billion.

**Definition**

**Sports drinks** - Drinks that enhance physical performance before, during or after physical/sporting activity. Sports drinks replace fluids and electrolytes/minerals lost by sweating and supply a boost of carbohydrate: isotonic (fluid, electrolytes and 6 to 8% carbohydrate), hypotonic (fluids, electrolytes and a low level of carbohydrate) and hypertonic (high level of carbohydrate).

**Energy drinks** - Traditional glucose based energy drinks; functional or stimulation energy drinks which claim a particular energy boost from caffeine, guarana, taurine and ginseng or other herbs or some combination of these ingredients.

**Latest developments**

Low calorie variants gained share in the energy drinks market as brands established low calorie and sugar-free options in response to the health conscious trend.

**Company spotlight**

Lucozade reformulated its drinks in 2016 to contain 50% less sugar, as well as launching a zero calorie or no sugar added variant for every product within its portfolio.

### Sports and Energy Drinks

#### Sports drinks

<table>
<thead>
<tr>
<th>Year</th>
<th>Volume (M litres)</th>
<th>YOY Growth (%)</th>
<th>Share of total soft drinks (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2011</td>
<td>162</td>
<td>2.7</td>
<td>1.2</td>
</tr>
<tr>
<td>2012</td>
<td>152</td>
<td>-6.1</td>
<td>1.1</td>
</tr>
<tr>
<td>2013</td>
<td>165</td>
<td>-4.3</td>
<td>1.1</td>
</tr>
<tr>
<td>2014</td>
<td>137</td>
<td>-5.5</td>
<td>1.0</td>
</tr>
<tr>
<td>2015</td>
<td>128</td>
<td>-6.9</td>
<td>1.0</td>
</tr>
<tr>
<td>2016</td>
<td>123</td>
<td>-3.9</td>
<td>0.9</td>
</tr>
</tbody>
</table>

#### Energy drinks

<table>
<thead>
<tr>
<th>Year</th>
<th>Volume (M litres)</th>
<th>YOY Growth (%)</th>
<th>Share of total soft drinks (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2011</td>
<td>517</td>
<td>12.8</td>
<td>3.8</td>
</tr>
<tr>
<td>2012</td>
<td>540</td>
<td>8.2</td>
<td>4.2</td>
</tr>
<tr>
<td>2013</td>
<td>595</td>
<td>6.3</td>
<td>4.4</td>
</tr>
<tr>
<td>2014</td>
<td>635</td>
<td>6.7</td>
<td>4.8</td>
</tr>
<tr>
<td>2015</td>
<td>666</td>
<td>6.9</td>
<td>5.0</td>
</tr>
<tr>
<td>2016</td>
<td>679</td>
<td>2.0</td>
<td>5.0</td>
</tr>
</tbody>
</table>

Source: Canadean

---

**Sports/Energy Split**

1. Energy Drinks - 85%
2. Sports Drinks - 15%

**Packaging Split**

1. PET/plastic - 35%
2. Metal - 65%

In 2016, the UK sports and energy drinks market was worth over £2 billion.
Advertising and marketing commitments

Britvic does not market to under 12s and does not advertise high sugar producers to under 16s. Where no or low sugar variants are widely available it will lead with these products in all above-the-line advertising.

Between 2011 and 2014, Coca-Cola increased marketing investment in its no-sugar, no-calorie colas by 25%.

In 2017, all of Britvic’s advertising will be focused on low and reduced sugar products.

10 years ago PepsiCo made the decision to stop advertising any HFSS products within its UK portfolio to children under 16 years of age, across any platform. PepsiCo also committed to only advertise low or no sugar cola variants in the UK.

In 2015, the soft drinks industry voluntarily agreed not to advertise regular soft drinks to children under 16, across all media channels, almost a year in advance of the Committee of Advertising Practice (CAP) ban coming into effect. This ongoing commitment also includes further restrictions to advertising around schools.

What more can we do...

Britvic has used the power of its brands to inspire 2.6m people to actively play together. Fruit Shoot has helped over 500,000 children get active through its ‘Active Skills’ campaign.

In 2017, all of A.G. Barr’s advertising will be focused on low and reduced sugar products.

ParkLives is part of a £20 million commitment by Coca-Cola Great Britain to invest in community-based programmes. Now into its fourth year, ParkLives has helped to support the wellbeing of local communities and grassroots organisations across the UK.

Over half a million British children go to school without breakfast. Magic Breakfast provides a nutritious breakfast to over 30,000 children across nearly 500 primary secondary and Special Educational Needs schools, plus Pupil Referral Units. To date, PepsiCo has donated almost a million servings of Quaker porridge oats and over a million litres of 100% fruit juice respectively (2009 – 2016).

The soft drinks industry is committed to encouraging responsible consumption of all its products. It provides a wide choice of calorie content and pack sizes; and nutrition labelling is included on pack so consumers can make an informed choice about the products they are drinking.

Case studies
Sustainability

The soft drinks industry is committed to reducing its environmental impact at all stages of the supply chain. As an industry we have been working closely together and with stakeholders to help shape the ambition for all our packaging in the UK to be 100% recyclable, that consumers recycle and that drinks containers do not end up as litter in our towns, countryside, rivers and oceans.

We believe that working together with Government, NGOs and other stakeholders real progress can be achieved to make the UK the world leader in creating a truly circular economy.

Recycling Rewards

The year-long ‘Recycling Rewards’ campaign, part funded by Encirc, was developed by Bryson Recycling in a bid to boost recycling levels and add value to the local economy all in aid of a good cause. For every tonne of glass, paper and plastic collected through Bryson Recycling’s kerbside box service, £1 will be donated to a local charity.

Love Your Forest

Each year 250 tonnes of rubbish are removed from the Forest of Dean, costing local tax-payers more than £400,000 a year. With the help of environment charity Hubbub, Lucozade Ribena Suntory took on the challenge to help shape the ambition for all our packaging in the UK to be 100% recyclable, that consumers recycle and that drinks containers do not end up as litter in our towns, countryside, rivers and oceans.

As a result of this partnership, The ‘Love Your Forest’ campaign was launched in 2016 and engages different sections of the local community in a collaborative effort on environmental initiatives.

Give Your Litter A Lift

In November 2016, environmental charity Keep Scotland Beautiful launched its national campaign to clean up Scotland’s roadsides – Give Your Litter A Lift – encompassing a range of interventions with local councils, roadside billboards, and partnerships with outlet village Gretna Gateway and McDonalds. The campaign is funded by Coca-Cola, A.G. BARR, Lucozade Ribena Suntory, Red Bull and Britvic.

Employment

The soft drinks industry is committed to British manufacturing and values the UK as a market place; reinvesting profits back into industry development, training and skills. It is also a highly efficient and productive sector – for every employee in soft drinks manufacturing some £126,000 is added to the national economy.

Soft drinks companies continuously invest in new technology and improved efficiency. Having high productivity rates, it is also a sector that rewards its employees well with an average wage of over £30,000. It also stimulates the wider economy significantly - for every direct job in UK soft drinks manufacturing, a further five are supported in the supply chain.

The supporting functions of soft drinks manufacturers such as finance, marketing, HR, public relations and advertising also have a significant impact on the UK economy.

Overall, soft drinks sector activity has been estimated by Oxford Economics to sustain over 340,000 jobs in manufacturing, retailing and hospitality.

348,000 jobs are supported by the soft drinks industry