

Cordials and Squashes - UK - April 2016

Report Price: £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



“Health and naturalness will remain important sales drivers in the market in the coming years. Innovating with plant-derived sweeteners and using the ‘no added sugar’ claim should be an effective way for brands to promote their health credentials.”

– Chris Wisson, Senior Drinks Analyst

This report looks at the following areas:

- Driving further growth of the super-concentrates segment
- Improving understanding of sugar and sweeteners could be beneficial
- Appealing to households’ different flavour and functional preferences

Squashes and cordials remain popular among Brits. The category has evolved in recent years, firstly into double concentrates and over the past three years, into super-concentrate ‘pocket’ squashes. This has helped to boost the average price of these drinks but has also crucially opened them up to out-of-home usage occasions. The popularity of the concentrates has contributed to the notable decline in volume sales in the market since 2010, a trend which is expected to continue – albeit at a slower rate – in the coming years.

Value sales have also struggled over the past two years, with the off-trade faring worse than on-trade. While the poor weather over the key summer season is partly responsible for this decline, other soft drink categories such as bottled waters and carbonates have not suffered as badly.

Along with other soft drinks, squashes and cordials are also under the spotlight with regards to their sugar content. ‘No added sugar’ variants have become common, with many brands reformulating their drinks to make them healthier and to keep on the right side of both the government but also retailers such as Tesco. The use of sugar and sweeteners is likely to remain a key industry issue in the coming years.

BUY THIS
REPORT NOW

VISIT:
store.mintel.com

CALL:
EMEA
+44 (0) 20 7606 4533

Brazil
0800 095 9094

Americas
+1 (312) 943 5250

China
+86 (21) 6032 7300

APAC
+61 (0) 2 8284 8100

EMAIL:
reports@mintel.com

DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market

Cordials and Squashes - UK - April 2016

Report Price: £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Table of Contents

Overview

- What you need to know
- Products covered in this Report

Executive Summary

- The market
- Tough times for squashes and cordials
 - Figure 1: Forecast of UK value sales of cordials and squashes, 2010-20
 - Figure 2: Forecast of UK volume sales of cordials and squashes, 2010-20
- Off-trade sales of squashes/cordials slump
- Soft drink sales correlate with the weather
- Squashes/cordials are traditionally a commodity category
- Sugar concerns impact the market
- Companies and brands
- Britvic's Robinsons brand dominates the market
 - Figure 3: Value sales of top-selling squash and cordial brands in the off-trade, 2015*
- NPD in the market rises in 2015
- Britvic drives a rise in adspend in 2015
- The consumer
- 82% of Brits drink squashes/cordials
 - Figure 4: Usage of squashes and cordials, by type, by frequency, February 2016
- Sugar content provokes the strongest response
 - Figure 5: Preferences regarding selected attributes of squashes and cordials, February 2016
- Exotic fruits can be lucrative for squash/cordial producers
- Child- and age-tailored variants resonate highly
 - Figure 6: Interest in types of squashes/cordials, February 2016
- What we think

Issues and Insights

- Driving further growth of the super-concentrates segment
 - The facts
 - The implications
- Improving understanding of sugar and sweeteners could be beneficial
 - The facts
 - The implications
- Appealing to households' different flavour and functional preferences
 - The facts
 - The implications

BUY THIS
REPORT NOW

VISIT: store.mintel.com
 CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094
 Americas +1 (312) 943 5250 | China +86 (21) 6032 7300
 APAC +61 (0) 2 8284 8100 |
 EMAIL: reports@mintel.com

Cordials and Squashes - UK - April 2016

Report Price: £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

The Market – What You Need to Know

- Tough times for squashes and cordials
- Off-trade sales of squashes/cordials slump
- Soft drink sales correlate with the weather
- Squashes/cordials are traditionally a commodity category
- Sugar concerns impacting the market

Market Size and Segmentation

- Tough times for squashes and cordials
 - Figure 7: UK value and volume sales of cordials and squashes, at current and constant prices, 2010-20
- Volumes are expected to continue falling
 - Figure 8: Forecast of UK value sales of cordials and squashes, 2010-20
 - Figure 9: Forecast of UK volume sales of cordials and squashes, 2010-20
- Off-trade sales of squashes/cordials slump
 - Figure 10: UK value and volume sales of cordials and squashes in the off-trade, at current and constant prices, 2010-15
 - Figure 11: UK on-trade value and volume sales of cordials and squashes, at current and constant prices, 2010-15

Market Drivers

- Weather affects soft drink sales
 - Figure 12: Annual hours of sunshine in the UK, by month, 2011-15
- Squashes/cordials are traditionally a commodity category
- Sugar concerns impact NPD...
 - ...and consumers
- An ageing population poses problems to the cordials/squashes market

Key Players – What You Need to Know

- Britvic's Robinsons brand dominates the market
- NPD in the market rises in 2015
- Super-concentrates and no-sugar variants attract NPD
- Britvic drives a rise in adspend in 2015

Market Share

- Britvic's Robinsons brand dominates the market
 - Figure 13: Value and volume sales of top-selling squash and cordial brands in the off-trade, 2013-15
- Ribena and Vimto buck the category downturn
- Premium cordial sales hold firm

Launch Activity and Innovation

- Innovation in the market rises in 2015
 - Figure 14: Share of new cordial and squash product launches in the UK non-alcoholic drinks market, 2011-15
- Asda has launched the most products into the market since 2011
 - Figure 15: Share of new launches in the cordials and squashes market, by company, 2011-15

BUY THIS
REPORT NOW

VISIT: store.mintel.com
 CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094
 Americas +1 (312) 943 5250 | China +86 (21) 6032 7300
 APAC +61 (0) 2 8284 8100 |
 EMAIL: reports@mintel.com

Cordials and Squashes - UK - April 2016

Report Price: £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Britvic is also a prominent innovator

Innovation in cordials

Healthier claims on the rise

Figure 16: Share of new launches in the cordials and squashes market, by claims, 2011-15

Brand Communication and Promotion

Britvic drives a rise in adspend in 2015

Figure 17: Total above-the line, online display and direct mail advertising expenditure on cordials/squashes, 2011-15

Figure 18: Total above-the line, online display and direct mail advertising expenditure on cordials/squashes, by top four companies, 2011-15

Suntory and Nichols are the other main advertisers

TV's popularity as an advertising channel wanes in 2015

Figure 19: Total above-the line advertising expenditure on cordials/squashes, by media channel, 2011-15

Nielsen Media Research coverage

Brand Research

What you need to know

Brand map

Figure 20: Attitudes towards and usage of selected drinks brands, December 2015

Key brand metrics

Figure 21: Key metrics for selected drinks brands, December 2015

Brand attitudes: Ribena enjoys strong associations to many positive qualities

Figure 22: Attitudes, by drinks brand, December 2015

Brand macro personality: Bottlegreen is seen as exclusive...

Figure 23: Brand personality – Macro image, December 2015

...as well as stylish and sophisticated

Figure 24: Brand personality – Micro image, December 2015

Brand analysis

Well-known Robinsons remains a popular brand

Figure 25: User profile of Robinsons, December 2015

Ribena also benefits from its high levels of consumer awareness

Figure 26: User profile of Ribena, December 2015

Bottlegreen stands apart from squash brands on sophistication

Figure 27: User profile of Bottlegreen, December 2015

Vimto falls down on trust and advocacy

Figure 28: User profile of Vimto, December 2015

Jucee has work to do to improve its image

Figure 29: User profile of Jucee, December 2015

The Consumer – What You Need to Know

82% of Brits drink squashes/cordials

Little change in usage patterns of squashes and cordials

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Cordials and Squashes - UK - April 2016

Report Price: £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Squashes and cordials appeal as a means to drink more water

Sugar content provokes the strongest response

Exotic fruits can be lucrative for squash/cordial producers

Child- and age-tailored variants resonate highly

Mixed flavour multipacks appeal

Usage of Squashes and Cordials

82% of Brits drink squashes/cordials

Figure 30: Repertoire of usage of types of squashes and cordials, February 2016

Standard squash leads the way

Figure 31: Usage of types of squashes and cordials, February 2016 and June 2014

Figure 32: Usage of squashes and cordials, by type, by frequency, February 2016

The rise of double and super-concentrates

Trends in Purchasing of Squashes and Cordials

Little change in usage patterns of squashes and cordials

Figure 33: Changes in purchasing squashes and cordials, February 2016

Hydration is a key driver for those buying more squashes/cordials

Figure 34: Reasons for buying squashes and cordials more, February 2016

Squash is winning users from other soft drinks

New flavours also support higher usage

Squashes/cordials are also losing out to other soft drinks

Sugar is a common concern...

...but so are sweeteners

Figure 35: Reasons for buying fewer or not buying squashes and cordials, February 2016

Squash and Cordial Preferences

Sugar content provokes the strongest response

Figure 36: Preferences regarding selected attributes of squashes and cordials, February 2016

Clear preference for familiar flavours

The taste of cordials/squashes vs other soft drinks

Younger consumers drive interest in warm/hot squashes/cordials and functionality

Double concentrates look set to continue growing

Figure 37: Share of new launches of squashes and cordials in the UK, by pack size, 2011-15

Interest in Flavour Types in Squashes and Cordials

Exotic fruits can be lucrative for squash/cordial producers

Figure 38: Interest in flavours of squashes/cordials, February 2016

Flavour can resonate with older drinkers

Niche interest in other lesser-used flavours

Interest in Squash and Cordial Products

Child- and age-tailored variants resonate highly

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Cordials and Squashes - UK - April 2016

Report Price: £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 39: Interest in types of squashes/cordials, February 2016

- Mixed flavour multipacks also appeal to many squash/cordial buyers
- Millennials drive interest in packaging innovation
- Strong demand for dosing caps
- Pocket-sized packs and pouches

Appendix – Data Sources, Abbreviations and Supporting Information

Abbreviations

Consumer research methodology

Appendix – Market Size and Segmentation

Figure 40: Best- and worst-case forecasts for the squashes and cordials market, by value, 2015-20

Figure 41: Best- and worst-case forecasts for the squashes and cordials market, by volume, 2015-20

Forecast methodology

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com