

Cordials and Squashes - UK - March 2021

Report Price: £1995.00 | \$2693.85 | €2245.17

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



“While health was firmly on the government and consumers’ agenda before the pandemic, the COVID-19 outbreak has brought it into even sharper focus. This spotlight has upped the potential for enhanced health benefits to appeal. Cordial/squash which supports immune health or with added vitamins/minerals, for example, interests around a third of drinkers/buyers.”
– Amy Price, Senior Food and Drink Analyst

This report looks at the following areas:

- The impact of COVID-19 on the cordials and squashes market.
- The outlook for the market in the re-emergence from the pandemic and recovery up to 2025.
- The latest new product development (NPD) trends.
- Consumers’ habits around drinking cordials and squashes.
- Consumer behaviours and attitudes towards cordials and squashes.

Immunity support has considerable scope to appeal in cordials and squashes. As many as a third of drinkers are interested in variants that support immunity, this proposition largely unexplored currently in the category.

The COVID-19 pandemic has hit total sales of cordials and squashes, which are estimated to have plunged by 13.1% in value in 2020. The record fall in on-trade sales in this market was entirely responsible for this slump and masks a strong retail performance. Although the new wave of lockdowns in early 2021 adds a further challenge for the recovery of the on-trade, sales are expected to rebound sharply in 2021. The strong image of the key players in the market and the role of cordials and squashes as affordable options will support growth during the income squeeze.

2020 provided a boost to the market, benefiting from homebound lifestyles, infrequent grocery shopping and cautious spending mentality, which has somewhat continued into 2021; however, much of this will be lost in 2022. With the children’s population declining, it remains imperative for operators to find ways to stay relevant to adults without children in the household. Premium versions and those with adult flavours offer means to encourage usage among this group.

The sustainability trend, which is likely to gain extra momentum in the wake of the pandemic, presents an opportunity for the market; 56% of drinkers/buyers agree cordials/squashes are a more environmentally friendly choice than ready-to-drink soft drinks (eg fizzy drinks, juice drinks) while 38% of buyers are interested in buying a version with sustainable packaging. Cordials and squashes have an advantage over other soft drinks with regards to plastic waste and carbon footprint. Communicating this difference through marketing messages should help the category to further mine this benefit.

**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 - March 2021

Report Price: £1995.00 | \$2693.85 | €2245.17

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

Table of Contents

Overview

Key issues covered in this Report

COVID-19: Market context

Economic and other assumptions

Products covered in this Report

Executive Summary

Impact of COVID-19 on cordials and squashes

Figure 1: Short-, medium- and long-term impact of COVID-19 on the cordials and squashes market, 23 March 2021

The market

Sales fall in 2020 as on-trade feels the effects of COVID-19

Figure 2: Market size for cordials and squashes, 2015-25 (prepared on 23 March 2021)

The market will enjoy a rapid rebound

Retail sales benefit from on-trade closures and more time at home

Income squeeze puts pressure on spending

Fall in number of children brings headwinds to the market

Companies and brands

Robinsons continues to lead the market

Figure 3: Leading brands' value shares in the UK retail cordials and squashes market, 2020/21*

Various brands push functional health benefits

Suntory leads advertising with Ribena; aiming to cultivate an artisan image

Robinsons leads on trust, quality and innovation; Belvoir and Bottlegreen on sophistication and style

The consumer

79% drink cordials/squash; usage skewed towards the young

Figure 4: Frequency of drinking types of cordials and squashes, November 2020

At home is the most popular place to drink cordial/squash

Figure 5: When cordials and squashes are drunk, November 2020

Naturalness is a priority for cordials/squash buyers

Figure 6: Interest in factors when buying cordials and squashes, November 2020

Emphasising immunity support would help manufacturers stand out

Figure 7: Interest in cordials/squashes with health benefits, November 2020

Promotions remain an incentive to switching

Figure 8: Behaviours related to cordials/squashes, November 2020

Cordials/squashes should push environmental credentials; stand to benefit from alcohol moderation trend

Figure 9: Attitudes towards cordials/squashes, November 2020

Issues and Insights

Emphasising immunity support would help manufacturers stand out in the wake of COVID-19

**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 - March 2021

Report Price: £1995.00 | \$2693.85 | €2245.17

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

- Cordials/squashes should push environmental credentials
- Moderation trend should benefit cordials/squashes
- Opportunities to push cocktails and food pairings for cordials/squashes

The Market – Key Takeaways

- Sales fall in 2020 as on-trade feels the effects of COVID-19
- The market will enjoy a rapid rebound
- Retail sales benefit from on-trade closures
- Income squeeze puts pressure on finances
- Fall in number of children brings headwinds to the market

Market Size and Forecast

- Impact of COVID-19 on cordials and squashes
Figure 10: Short-, medium- and long-term impact of COVID-19 on the cordials and squashes market, 23 March 2021
- Sales fall in 2020 as on-trade feels the effects of COVID-19
Figure 11: Market size for cordials and squashes, 2015-25 (prepared on 23 March 2021)
- The market will enjoy a rapid rebound
Figure 12: Market size for cordials and squashes, 2015-25 (prepared on 23 March 2021)
- Market drivers and assumptions
Figure 13: Key drivers affecting Mintel's market forecast, 2015-25 (prepared on 23 March 2021)
- Learnings from the last recession
Figure 14: Value sales of cordials and squashes, 2007-12
- Forecast methodology

Channels to Market

- Retail sales benefit from on-trade closures, stay-at-home orders and cautious spending
- On-trade sales hit during COVID-19 outbreak
Figure 15: Value sales of cordials and squashes in the on- and off-trade, 2015-20

Market Drivers

- Income squeeze puts pressure on finances...
...further fuelling alcohol reduction trend
- Brexit has limited impact on cordials and squashes
- Fall in number of children brings headwinds to the market
Figure 16: Trends in the age structure of the UK population, 2015-20 and 2020-25

Companies and Brands – Key Takeaways

- Robinsons continues to lead the market
- Various brands push functional health benefits
- Suntory leads advertising with Ribena; aiming to cultivate an artisan image
- Robinsons leads on trust, quality and innovation; Belvoir and Bottlegreen on sophistication and style

Market Share

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 - March 2021

Report Price: £1995.00 | \$2693.85 | €2245.17

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

Robinsons continues to lead

Figure 17: Leading brands' value sales and share in the UK retail cordials and squashes market, 2018/19-2020/21

Vimto sees fastest growth; Ribena bounces back

Own-label performs well

Launch Activity and Innovation

Vimto offers refills at Asda store

Figure 18: Ribena references recycled plastic on front of pack, 2021

Various brands push functional health benefits

Capri-Sun enters the category with functional squashes

Other brands also look to functionality

Figure 19: Ocean Spray and Robinsons launch fortified versions, 2020

Ribena moves into botanicals and redesigns core range

Ribena targets those trading up with botanicals launch

Figure 20: Ribena launches premium cordials line, 2020

Core Ribena range receives redesign

Premium launches continue to mine production, provenance and ingredients

Figure 21: NPD referencing production methods or ingredients, 2019/20

Figure 22: Premium NPD highlighting production methods/ingredients in cordials/squashes, 2020

Value ranges rebrand

Figure 23: Own-labels rename/relaunch products, 2020

Belvoir and Squash'd update their designs

Belvoir rebrands to Belvoir Farms

Figure 24: Belvoir Fruit Farms rebrands to Belvoir Farms, 2021

New look for Robinsons Squash'd

Figure 25: Robinsons updates the packaging of Squash'd, 2020

Seasonal NPD looks to extend usage beyond warmer months

Figure 26: Seasonal NPD in cordials/squashes, 2020

Advertising and Marketing Activity

Advertisers increase spend in 2020

Figure 27: Total above-the-line, online display and direct mail advertising expenditure on cordials and squashes, by media, 2019 and 2020 (sorted by 2020)

Suntory is the leading advertiser

2019-20 marketing aims to cultivate an artisan image for Ribena

Ribena offers meditative escapism through film shorts

Figure 28: Total above-the-line, online display and direct mail advertising expenditure on cordials and squashes, by advertiser, 2019 and 2020 (sorted by 2020)

Britvic supports Robinsons Fruit Creations

Robinsons offers daily craft projects

Nielsen Ad Intel coverage

Brand Research

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 - March 2021

Report Price: £1995.00 | \$2693.85 | €2245.17

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

Brand map

Figure 29: Attitudes towards and usage of selected brands, January 2021

Key brand metrics

Figure 30: Key metrics for selected brands, January 2021

Brand attitudes: Robinsons is most widely seen as offering good value

Figure 31: Attitudes, by brand, January 2021

Brand personality: Robinsons and Ribena lead on accessibility, Belvoir and Bottlegreen on exclusivity

Figure 32: Brand personality – macro image, January 2021

Belvoir and Bottlegreen stand out on associations with sophistication and style

Figure 33: Brand personality – micro image, January 2021

Brand analysis

Robinsons leads on trust, quality and innovation

Figure 34: User profile of Robinsons, January 2021

Belvoir is seen most widely as a connoisseur brand

Figure 35: User profile of Belvoir, January 2021

Bottlegreen scores better than most on being stylish, sophisticated and special

Figure 36: User profile of Bottlegreen, January 2021

Ribena is seen to be delicious by almost a third

Figure 37: User profile of Ribena, January 2021

Vimto is seen to be the brand least worth paying more for

Figure 38: User profile of Vimto, January 2021

The Consumer – Key Takeaways

Health becomes more of a priority in the wake of the pandemic

Moderation trend should benefit cordials/squashes

Sustainability rises on consumers' radars

Promotions remain an incentive to switching

Impact of COVID-19 on Consumer Behaviour

On-trade closures see many occasions lost

Lockdowns/restrictions stop on-premise sales

Dining out and holidays are leisure activities people look forward to most

Health becomes more of a priority in the wake of the pandemic

Sustainability rises on consumers' radars

One in four say environment is a higher priority

Keen spotlight on packaging

Usage

79% drink cordials/squash; over half drink more than three types

Families and higher-income households more likely to drink cordials/squashes

Figure 39: Repertoires of types of cordials and squashes drunk, November 2020

**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 - March 2021

Report Price: £1995.00 | \$2693.85 | €2245.17

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

Standard squash is drunk most frequently

Figure 40: Frequency of drinking types of cordials and squashes, November 2020

No-added-sugar versions are the most popular

Figure 41: Usage of no-added-sugar and regular cordials and squashes, November 2020

Where Cordials/Squashes Are Drunk

At home is the most popular place to drink cordial/squash

Squash and cordials have traditionally been homebound

Refill trend holds potential for out-of-home usage

Figure 42: When cordials and squashes are drunk, November 2020

Interest in Cordial/Squash Concepts

Health is a priority as people look for naturalness...

...added vitamins/minerals also appeal

Figure 43: Interest in factors when buying cordials and squashes, November 2020

Flavour innovation – exotic, seasonal and botanical – would interest minority

Exotic flavours interest one in three

Seasonal and botanical flavours appeal to a minority

A lack of alcohol-inspired flavours

Smaller formats encourage trial

Desired Health Benefits

Emphasising immunity support would help manufacturers stand out

Figure 44: Interest in cordials/squashes with health benefits, November 2020

22% want cordials/squashes to help them relax/de-stress...

...but 28% look for energy

Cordials and Squashes Behaviours

Promotions remain an incentive to switching...

...but there is room for added-value propositions

Figure 45: Behaviours related to cordials/squashes, November 2020

Opportunities to push cocktails and food pairings for cordials/squashes

Attitudes towards Cordials and Squashes

Cordials/squashes should push environmental credentials

Nearly half of users are unaware of category's green credentials

Figure 46: Attitudes towards cordials/squashes, November 2020

Packaging and ingredients can lend standout for individual operators

Refills hold future potential

Moderation trend should benefit cordials/squashes

Appendix – Data Sources, Abbreviations and Supporting Information

Abbreviations

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 - March 2021

Report Price: £1995.00 | \$2693.85 | €2245.17

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

Consumer research methodology

Appendix – Market Size and Forecast

Forecast methodology

Figure 47: UK value sales of cordials and squashes, best- and worst-case forecast, 2020-25

Appendix – Market Share

Figure 48: Leading manufacturers' sales and share in the UK retail cordials and squashes market, 2018/19-2020/21

**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