

## Carbonated Soft Drinks - UK - May 2013

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

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*"A striking 41% of consumers who have bought soft drinks in the on-trade currently consider their quality as poor, and only one in three users are satisfied with the range available, highlighting that there remains unmet demand in terms of choice and quality of soft drinks in the on-premise market."*

– Heidi Lanschützer, Food & Drink Analyst

### In this report we answer the key questions:

- Is there further scope for stevia-based drinks in the market?
- How can the industry engage the ageing population?
- What measures can be taken to boost CSD sales in the on-trade?
- What NPD opportunities are there to maintain the category's exciting image?

With penetration of almost 90%, carbonated soft drinks enjoy almost universal appeal in the UK. Product innovation is rife, making this a dynamic and highly competitive marketplace.

Benefiting from their cheap price positioning, carbonated soft drinks exhibited resilient volume growth throughout the recession. However, for the first time in years, volumes declined in 2012, despite key events like the Queen's Diamond Jubilee, the London Olympic/Paralympic Games and the UEFA 2012 Football Championship. Pressure from public entities related to soft drinks' allegedly negative impact on people's health, combined with poor weather throughout the summer months and consumers' continuously squeezed budgets, contributed to this decline. However, rising average selling prices, fuelled by rising commodity costs, have countered waning sales and kept value growth in positive territory.

In the light of consumers' increasing efforts to improve their health, diet/low-calorie options as well as carbonates with high fruit content represent strong growth opportunities. Also, there are still notable opportunities in the on-premise market, given the consumer trend for cutting back on alcoholic drinks and foodservice and on-trade operators' greater focus on food-led formats.

Also, continuing to invest in NPD, particularly in terms of packaging and new flavours, should help to maintain the category's fun and exciting image.

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