

Soft Drinks - Ireland - November 2017

Report Price: £1095.00 | \$1453.83 | €1247.97

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



“Sugar content continues to be the dominant theme in the soft drinks market, with the April 2018 introduction of the sugar tax/ levy likely to disrupt consumer drinking habits somewhat. Moving forward we are likely to see an increased shift to diet/ low-sugar variants.”
– Brian O’Connor, Senior Consumer Analyst

This report looks at the following areas:

- Obesity a major health issue in Ireland
- Sugar taxes being introduced in 2018
- Soft drink prices increasing in UK/NI, declining in RoI
- Increasing visitor numbers an opportunity for on-trade soft drink sales

This Report will examine the sale and consumption of carbonated and non-carbonated beverages throughout the island of Ireland in both the on-trade and off-trade. On-trade sales are defined as sales of non-carbonated drinks via pubs, bars, restaurants or cafés for consumption on premises, while off-trade sales are defined as those made via retailers such as supermarkets and convenience stores.

**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

Soft Drinks - Ireland - November 2017

Report Price: £1095.00 | \$1453.83 | €1247.97

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
- Bottled water
- Fruit juices, fruit drinks and smoothies
- Cordials and squashes
- Carbonated drinks

Executive Summary

The market

Figure 1: Estimated value sales for all soft drinks, IoI, NI and RoI, 2012-17

Forecast

Figure 2: Indexed estimated value sales for all soft drinks, NI and RoI, 2012-22

Market factors

- Obesity a major health issue in Ireland
- Sugar taxes being introduced in 2018
- Soft drink prices increasing in UK/NI, declining in RoI
- Increasing visitor numbers an opportunity for on-trade soft drink sales

Companies and Innovations

The consumer

Bottled water usage driven by health trend

Figure 3: Types of non-carbonated drinks that consumers have drunk in the last month, NI and RoI, September 2017

Colas most used type of carbonate

Figure 4: Types of carbonated drinks that consumers have drunk in the last month, NI and RoI, September 2017

2017 sees consumers cut back on sugary drinks

Figure 5: Consumer soft drink behaviours, NI and RoI, September 2017

Appetite for bottle return soft drinks scheme

Figure 6: Agreement with statements relating to soft drinks, NI and RoI, September 2017

The Market – What You Need to Know

- Soft drinks sales to grow in 2017
- Sugar tax to be introduced in UK/NI and RoI
- Weight issues continue to affect Irish consumers
- Increased visitors an opportunity for soft drinks brands

Market Size and Forecast

Value sales continue to grow in 2017

Figure 7: Estimated value sales for all soft drinks, IoI, NI and RoI, 2012-22

On-trade sees slight drop in 2017

**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

Soft Drinks - Ireland - November 2017

Report Price: £1095.00 | \$1453.83 | €1247.97

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

Figure 8: Estimated value sales for all on-trade soft drinks, IoI, NI and RoI, 2012-22

Off-trade sees strong growth between 2016 and 2017

Figure 9: Estimated value sales for all off-trade soft drinks, IoI, NI and RoI, 2012-22

Market Segmentation

Inflation in NI and improved out-of-home activity increase carbonated sales

Figure 10: Total value sales of carbonated drinks market, IoI, NI and RoI, 2012-22

Figure 11: On-trade vs. off-trade value sales of carbonated drinks, NI and RoI, 2012-17

Growth continues to be sluggish in the juice sector

Figure 12: Total value sales of juice drinks market, IoI, NI and RoI, 2012-22

Water value continues to grow due to health trend

Figure 13: Estimated value sales of non-carbonated bottled water sector, IoI, NI and RoI, 2012-22

Concentrate sector continues to decline

Figure 14: Estimated value sales of concentrate sector (including cordials and squash), IoI, NI and RoI, 2012-22

Sports and energy drinks sales continue to grow in 2017

Figure 15: Estimated value sales of sports and energy drinks, IoI, NI and RoI, 2012-22

Market Drivers

April 2018 to see new sugar levy introduced simultaneously in UK and RoI

Companies already taking steps to reduce sugar

Figure 16: Number of carbonated soft drink launches claiming to have L/N/R sugar, UK and Ireland, 2012-17

Figure 17: Number of carbonated soft drink launches claiming to have L/N/R sugar, by company, UK and Ireland, 2012-17*

Sugar tax set to see consumers cut back

Figure 18: How consumers would change their drinking habits for fizzy drinks if a 24p/30c tax was introduced, NI and RoI, September 2017

Figure 19: Ingredients in food and drink products consumers are concerned about, NI and RoI, June 2017

Soft drink prices declining in RoI, increasing in the UK/NI

Figure 20: Consumer price indices for minerals/ spring water, soft drinks and fruit & vegetable juices, 2012 January-September 2017

Figure 21: Consumer price indices for soft drinks, January 2015-September 2017

Figure 22: Historical exchange rates, UK Sterling (£) compared to euro (€) and US Dollar (\$), 2012-17

Obesity remains a growing challenge for the industry

Figure 23: Obesity levels in adults aged 16+, NI, 2010/11-2015/16

Figure 24: Obesity levels in children aged 2-15, NI, 2012/13-2015/16

Figure 25: Body mass index, by gender, RoI, 2015

Figure 26: Percentage of under-5s classed as overweight or obese, EU, 2015

Boost in tourism helping soft drink sales

Figure 27: Tourist performance of NI, January-June 2017

Figure 28: Trips to RoI, by area of origin, January-September 2014-17

Companies and Brands – What You Need to Know

SHS Group expands with purchase of Standard Brands

Coca-Cola packaging targets more sustainability

**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

Soft Drinks - Ireland - November 2017

Report Price: £1095.00 | \$1453.83 | €1247.97

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

PepsiCo targeting growth through healthy drinks and snacks

Who's Innovating?

Strong level of soft drink launch activity in 2016-17

Figure 29: Top launches of soft drinks, UK and Ireland, 2011-17*

Juice the most commonly launched soft drink since 2012, ahead of carbonated drinks

Figure 30: Top claims by new soft drinks products launched, UK and Ireland 2012-17*

Ethical or environmentally friendly packaging claims see compound increase from 2016 to 2017

Many new products launched combine the top four claims

Figure 31: Top claims made by new carbonated soft drinks products launched, 2012-17*, UK and Ireland

Major brands already prepared for next year by developing new recipes to cut sugar

Rising number of soft drinks claiming added functionality

Company Profiles

AG Barr

Key facts

Product portfolio

Figure 32: AG Barr carbonated, still, water and fruit juice-based soft drinks products, 2017

Brand NPD

Recent developments

Britvic Ireland

Key facts

Product portfolio

Figure 33: Britvic carbonated, still, water and fruit juice-based soft drinks products, 2017

Brand NPD

Recent developments

SHS Group

Key facts

Product portfolio

Figure 34: Bottlegreen and Shloer brand soft drinks products, 2017

Brand NPD

Recent developments

Coca-Cola

Key facts

Product portfolio

Figure 35: Coca-Cola carbonated, still, mixers and fruit juice-based soft drinks products, 2017

Brand NPD

Recent developments

Danone

Key facts

Product portfolio

**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

Soft Drinks - Ireland - November 2017

Report Price: £1095.00 | \$1453.83 | €1247.97

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

Brand NPD

Recent developments

Del Monte

Key facts

Product portfolio

Figure 36: Del Monte fruit juice and fruit juice-based soft drink products, 2017

Brand NPD

PepsiCo

Key facts

Product Portfolio

Figure 37: PepsiCo carbonated, still and fruit juice products, 2017

Brand NPD

Recent developments

Princes Group Ltd.

Key facts

Product portfolio

Figure 38: Princes and Jucee pure fruit juice, fruit juice blends, fruit juice blends and cordials soft drinks products, 2017

Brand NPD

Lucozade Ribena Suntory

Key facts

Product portfolio

Figure 39: Lucozade Ribena Suntory carbonated, still and fruit juice-based soft drinks products, 2017

Brand NPD

Recent developments

Red Bull

Key facts

Product portfolio

Figure 40: Red Bull energy drink products, 2017

Brand NPD

The Consumer – What You Need to Know

Bottled water the non-carbonated beverage of choice

Cola the most popular carbonated soft drink

Consumers avoiding sugary soft drinks

Bottle return scheme interests Irish consumers

Usage of Non-carbonated Beverages

Bottled water most popular non-carbonate

Figure 41: Types of non-carbonated drinks that consumers have drunk in the last month, NI and RoI, September 2017

Water usage stronger among women and 16-24-year-olds

Figure 42: Consumers who have drunk bottled water in the last month, by gender and age, NI and RoI, September 2017

**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

Soft Drinks - Ireland - November 2017

Report Price: £1095.00 | \$1453.83 | €1247.97

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

NI consumers stronger users of squash and cordial

Figure 43: Consumers who have drunk squash and cordial at home in the last month, NI and RoI, September 2017

Over a third have used 100% pure juice

Figure 44: Consumers who have drunk 100% fruit juice at home in the last month, by presence of children, NI and RoI, September 2017

Usage of Carbonated Beverages

Standard colas maintain top spot in 2017

Figure 45: Types of carbonated drinks that consumers have drunk in the last month, NI and RoI, September 2017

Millennials and men chief users of standard cola

Figure 46: Consumers who have drunk standard colas at home in the last month, by gender and age, NI and RoI, September 2017

Figure 47: Actual and projected population (%) for RoI and NI, by age, 2011 and 2026

Diet colas appeal more to Irish women

Figure 48: Consumers who have drunk standard colas vs diet colas at home in the last month, by gender, NI and RoI, September 2017

NI consumers stronger users of carbonated energy drinks

Figure 49: Consumers who have drunk carbonated energy drinks in the last month, by age, NI and RoI, September 2017

Soft Drink Behaviours

Over half of consumers avoiding sugary drinks

Figure 50: Consumer soft drink behaviours, NI and RoI, September 2017

Mature consumers more inclined to avoid sugary drinks

Figure 51: Agreement with the statement 'I am more likely to avoid sugary carbonated drinks compared to 12 months ago', by age, NI and RoI, September 2017

Tap water seeing increased usage

Figure 52: Agreement with the statement 'I am drinking more tap water compared to 12 months ago', by social class group, NI and RoI, September 2017

One in three interested in high-protein soft drinks

Figure 53: Agreement with the statement 'I would be interested in trying soft drinks that contain a higher level of protein', by gender, NI and RoI, September 2017

Figure 37: Perceived benefits of eating or drinking high-protein food and drinks, NI and RoI, February 2017

Attitudes towards Soft Drinks

Bottle return scheme appeals to four in five consumers

Figure 54: Agreement with statements relating to soft drinks, NI and RoI, September 2017

Bottle return scheme more popular among women

Figure 55: Agreement with the statement "I would like to see a money-back bottle return scheme of soft drink bottles introduced to help reduce packaging waste", by gender, NI and RoI, September 2017

Three quarters of consumers want manufacturers to take steps to reduce sugar...

...but taste is more important than low sugar

Figure 56: Agreement with the statement "Taste is more important than low sugar content when buying soft drinks", NI and RoI, September 2017

Appendix – Data Sources, Abbreviations and Supporting Information

Consumer research

Data sources

Market size rationale

Abbreviations

Appendix – The Market

**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

Soft Drinks - Ireland - November 2017

Report Price: £1095.00 | \$1453.83 | €1247.97

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

Market segmentation tables

Bottled water

Figure 57: Estimated value of bottled water sector, on-trade, IoI, NI and RoI, 2012-22

Figure 58: Estimated value of bottled water sector, off-trade, IoI, NI and RoI, 2012-22

Juice

Figure 59: Estimated value of juice sector, on-trade, IoI, NI and RoI, 2012-22

Figure 60: Estimated value of juice sector, off-trade, IoI, NI and RoI, 2012-22

Concentrate

Figure 61: Estimated value of concentrate sector (inc cordials and squash), on-trade, IoI, NI and RoI, 2012-22

Figure 62: Estimated value of concentrate sector (inc cordials and squash), off-trade, IoI, NI and RoI, 2012-22

Carbonated beverages

Figure 63: Value sales of carbonated drinks market – on-trade, IoI, NI and RoI, 2012-22

Figure 64: Value sales of carbonated drinks market – off-trade, IoI, NI and RoI, 2012-22

Energy drinks

Figure 65: Estimated value sales of sports and energy drinks, IoI, NI and RoI, 2012-22

**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