

Sparkling Drinks - China - 2021

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This report looks at the following areas:

- Future market outlook and growth prospects in the next five years
- Latest new product trends and growth opportunities
- Change in consumption trends and consumption occasions
- Purchase journey and implications on information channel choices
- Premiumisation directions to warrant higher price points
- Attitudes towards sucrose and sugar substitutes

84% of consumers would like to try flavoured sparkling drinks with low sweetness. Brands should help consumers get used to less-sweet flavours by introducing additional options featuring low sweetness, as many tea house brands have already done.

A rapid recovery in foodservice, still the most common consumption occasion for carbonated soft drinks (CSD) following the gradual return to normality, drives a rebound in non-retail consumption and fuels growth in the total consumption volume of CSD. Meanwhile, consumers' continuous investment in in-home foods reveals that in-home occasions still deserve special attention in the post-COVID-19 period.

Flavoured sparkling water is the biggest threat to the CSD market. With minus claims and better-for-you positioning, flavoured sparkling water has continued to expand its popularity in the last year. In comparison, nearly 30% of consumers have drunk less non-diet CSD, the highest ratio among all sparkling drinks. Diet/light CSD is expected to have more growth momentum given the heightened attention to the sugar content of non-alcoholic drinks.

The prevalence of sugar-free, low/no/reduced (L/N/R) fat and calorie claims in sparkling drinks offers more better-for-you alternatives to consumers but also contributes to increasing homogeneity in the market. Fortification with nutrition and functional benefits will help differentiate and warrant a higher price point



“Sparkling drinks have been refined with sugar-free, low/no/reduced calorie and fat claims following the growing popularity of sparkling water. However, the prevalence of these minus claims in new products also results in increasing homogeneity.”

– Roolee Lu, Senior Research Analyst

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for sparkling drinks, as consumers are willing to pay more for positive nutrition and added functionality.

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