

Soft Drinks: The future lies beyond sugar

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Abstracts

Soft Drinks: The future lies beyond sugar

SUMMARY

Some major new trends are sweeping through the beverage industry and they are having a major impact on both manufacturers and consumers. For the soft drinks industry sugar has now become a dirty word and sugar taxes have forced companies to create new formulas and diversify away from carbonates as that segment begins to decline. For the enhanced water segment new opportunities are developing as consumers are moving towards bottled water and away from sugar and this means a great deal of innovation is happening with new enhanced water healthy ingredients. For the hot drinks industry convenience and premiumization is changing the landscape and new types of on the go products are becoming the main consumer choice. Packaging up these products is becoming a major headache for beverage manufacturers however, as environmental challenges and consumer behaviors are forcing companies to look for new solutions to old problems.

KEY HIGHLIGHTS

Sugar has been increasingly linked in the public consciousness to obesity as several pressure groups have made headlines. As obesity is an increasingly prevalent problem in global public health, it has led to consumers abandoning carbonated soft drinks and also to regulators increasing scrutiny.

The result of increased awareness campaigns has seen the mainstay of beverage manufacturers, carbonated soft beverages, see a drop in volumes. The Coca-Cola Company and PepsiCo, two of the largest beverage manufacturers, have seen their volumes of traditional products fall, as well as

the wider industry. According to MarketLine data, global carbonated soft drinks volumes fell with a compound annual rate of change (CARC) of -1% between 2012 and 2016.

Nine countries have currently implemented a form of sugar tax, while Denmark did introduce one but was repealed in 2014. The most recent implementer was the UK, which enacted its tax in April 2018. The levy is being applied to manufacturers - whether they pass it on to consumers or not is up to them. Drinks with more than 8g per 100ml will face a tax rate equivalent to 24p per liter. Those containing 5-8g of sugar per 100ml will face a slightly lower rate of tax, of 18p per liter. Pure fruit juices will be exempt as they do not carry added sugar, while drinks with high milk content will also be exempt due to their calcium content.

SCOPE

Examine the major trends in the drinks and beverage industry and what companies are doing to exploit them

See why the latest sugar coverage is having such a big effect on the industry

Explore the reasons behind the rise of bottled water and the new opportunities in that segment

Examine the problems the industry faces with packaging

REASONS TO BUY

What are the key changes happening in the non alcoholic drinks industry?

What players are making significant new moves in the industry?

Are there any opportunities arising out of major industry trends?

What new products are starting to gain traction with consumers?

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Catalyst

Summary

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Sugar increasingly perceived as a potential cause of obesity

Carbonated soft drinks are experiencing declining volumes

Several governments have introduced sugar taxes

Sugar free or low-calorie drinks offer an alternative

Coca-Cola grows both Zero Sugar and Diet Coke ranges

Low sugar alternatives don't always guarantee success

Drinks perceived healthier have thrived

Concerns about sugar leading to boosting vegetable juices

Companies have faced lawsuits for false marketing

Premiumization becoming more popular

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