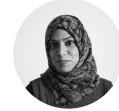


A YEAR OF INNOVATION IN CARBONATED SOFT DRINKS, 2022

More adventurous flavours are arriving, as consumers demand alternatives to classic sweet flavours. Sugar-free claims and private label launches are gaining share.



Amrin Walji, Senior Innovation Analyst



Report Content



- What we have seen
- Our pick of the most innovative launches in this review
- Other innovative launches
- Innovation opportunities in carbonated soft drinks

EUROPE, MIDDLE EAST & AFRICA (EMEA)

Europe: CSD launches with sustainable claims record an increased share of activity

- Sustainable packaging is important to consumers
- Launches are shifting away from plastic and aluminium packaging
 - Graph 1: launches of carbonated soft drinks, by share of package material, 2018-22
- Brands employ different tactics to convey a more environmentally friendly image
- Brand renovation/innovation: 7UP switches to clear plastic bottles to boost recycling rates

Europe: CSD brands respond to heightened consumer demand for less sweet flavours

- Consumers show interest in less sweet flavours
- Launch activity in classic beverage flavours continues to decline as fruit and flora gain
 - Graph 2: launches of carbonated soft drinks, by share of flavour component group, 2018-22
- Less sweet flavours can expand and diversify the audience of CSDs

The Middle East & Africa (MEA)

- Sugar-free claims are growing among launches of CSDs in MEA

ASIA PACIFIC (APAC)

Launches of mixers and tonics increase in Australia as cocktail culture coincides with the cost of living crisis

- Inflationary pressures influence consumer behaviour
- Tonic-style CSDs have recorded an increase in launch activity in Australia and New Zealand
 - Graph 3: launches of carbonated soft drinks, by share of flavour component, 2018-22
- Innovation targets in-home mixologists

Asia: brands intensify their focus on sugar-free innovations

- Consumers are concerned about the sugar content of non-alcoholic drinks
- Sugar-free CSDs record a rise in launch activity
- CSD brands are zeroing in on sugars and calories
- Brand renovation/innovation: The Coca Cola Company launches limited-edition, space-inspired zero-sugar drink

A year of innovation in carbonated soft drinks, 2022

Australia & New Zealand

- CSD brands embrace the alcohol alternative opportunity with sophisticated innovations

THE AMERICAS

North America: private label launches record a surge in activity

- The brand of CSD plays an influential role for shoppers
- Private label steps up launch activity in CSDs
 - Graph 4: launches of carbonated soft drinks, by share of branded vs private label, 2018-22
- Private label CSDs take on brands with higher quality attributes and internationally inspired flavours

North America: functional claims slowly gain profile among CSD launches

- Vitamin/mineral fortification can help CSD users find balance in their quest toward healthier choices
- Vitamin/mineral-fortified and immune support claims drive growth in better-for-you CSDs
 - Graph 5: launches of carbonated soft drinks, by share of select functional and plus health claims, 2021-22
- Functional claims are explicitly highlighted on cans

Natural claims grow among CSD launches in Brazil

- Consumers demonstrate interest in CSDs made with natural ingredients
 - Graph 6: launches of carbonated soft drinks, by share of select natural claims, 2020-22
- CSD launches celebrate natural credentials

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Japan	+81 (3) 6228 6595
Singapore	+65 (0)6 818 9850