

A YEAR OF INNOVATION IN CARBONATED SOFT DRINKS, 2023

Recipes with low/no sugar content and clean-label qualities are big focuses of innovation, and brands are also engaging with the alcohol reduction trend.



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Report Content



- What we have seen
- Our pick of the most innovative launches in this review
- Other innovative launches
- The Future of Carbonated Soft Drinks

EUROPE, MIDDLE EAST AND AFRICA (EMEA)

Europe: consumers want CSD brands to take an exciting and bold approach to flavour innovation

- The link between CSDs and indulgence stems from the sector's big flavour reputation
- Limited edition CSDs tend to focus on quirkily sweet profiles
- Brand renovation/innovation: Iconic confectioner, Barratt, puts its name to a nostalgic drinks range

Europe: innovation acknowledges consumers' emotional need states

- Consumers look to food and drink to help them manage the challenges of modern life
- CSDs innovate around mood and relaxation

The Middle East and Africa (MEA)

- CSD brands embrace the alcohol-alternative opportunity

ASIA PACIFIC (APAC)

Asia: CSD launches innovate around flavour complexity

- Consumers are attracted to adventurous flavours
- CSD brands experiment with relaxation, aroma and texture

Asia: brands strive to reduce sugar content in CSDs

- For many Asian consumers, sugar is an increasingly unwelcome ingredient in CSDs
- Top sweeteners used in low/no-sugar CSDs
 - Graph 1: CSD launches with low/no sugar claims, by top four sweetener ingredients, 2019-23
- Brands are zeroing in on sugar and calorie content

Australia and New Zealand

- Prebiotic sodas are gaining a wider presence in Australia

THE AMERICAS

North America: the share of CSD launches with no additive/preservative claims continues to rise

- Consumers are seeking out more natural soft drinks
- No-additive and preservative claims lead natural CSD innovation in North America
 - Graph 2: carbonated soft drink launches, by share of select natural claims, 2021-23
- CSD brands focus on clean-label and natural recipes

North America: CSD makers look to capitalise on the alcohol reduction trend

- Sober-curious consumers are opting for CSDs as their preferred alcohol alternative
- Premium, healthy and interestingly flavoured CSDs seek to appeal as an alcohol alternative

Latin America: inflationary pressures prompt CSD brands to strengthen focus on value-for-money features

- Financial pressures are driving consumers to seek out more-affordable CSD options
- Branded CSDs promote value-for-money attributes

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