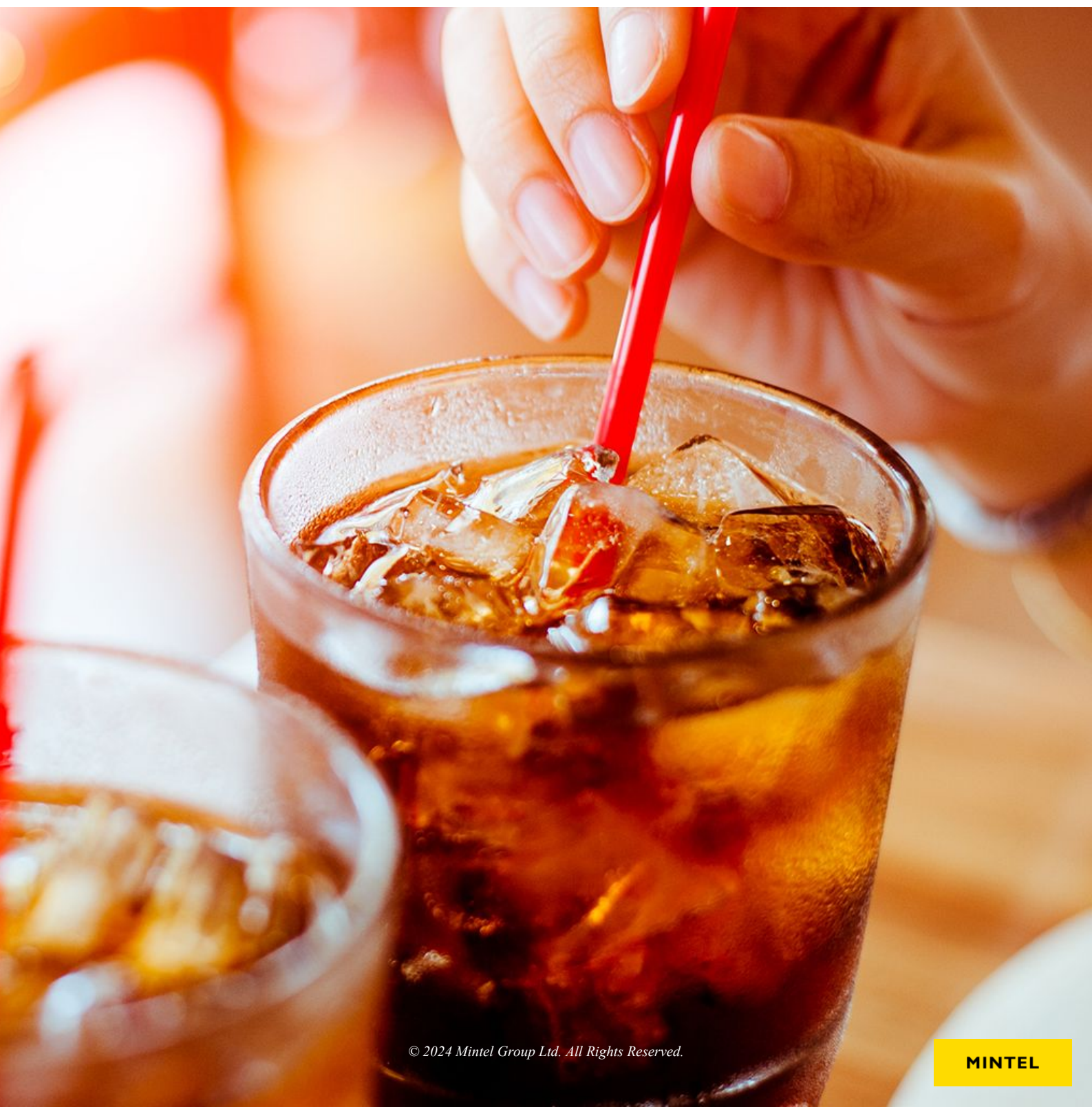


THE FUTURE OF CARBONATED SOFT DRINKS: 2019

Global Annual Review: what's now and what's next for the carbonated soft drinks (CSD) market.



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Food & Drink Analyst



Report Content

- A look back, and a look ahead

THE BIG STORIES

- Mintel's perspective

Sugar taxes across the globe are reshaping the CSD category

- Sugar tax in the UK has led to product reformulations and increasing numbers of reduced-sugar variants
- Switching, 'shrinkflation' and reformulation follow the implementation of the UK sugar tax
- Reformulation is the key strategy for CSD brands in the Philippines following 2018 sugar tax implementation
 - Graph 1: retail market volume and value of carbonated soft drinks, 2013-22

Sugar backlash triggers new CSD innovations

- CSD brands adopt various strategies to remain relevant against sugar backlash
- The spotlight on sugar encourages consumers to rethink their attitudes towards sugary food and drink
- CSD brands are working on various strategies to maintain consumer interest in their products, with or without sugar

Bringing sensory appeal to consumers

- Coca-Cola is on the mission to engage with consumers through textural experiences
- Arctic Coke: finding balance between liquid and frozen drinks
- Disruptive colourless CSDs can appeal to Millennials and iGens
- Bold flavours, preferably from small producers, are appealing to young audiences
- Unique CSD packaging can help create multi-sensory brand experiences

IN THE NEXT TWO YEARS

- Mintel's perspective

How CSDs can become the 'next better-for-you' drink

- Consumers around the world show interest in CSDs with added functional ingredients
- Botanicals in CSDs can help brands meet consumer demand for functional drink formulations
- Thorough and transparent communication is required when innovating with botanicals in CSDs

CSDs can capitalise on the status of permissible indulgence

- Regular CSDs can be a permissible indulgence
- 'Permissible treats' within a healthy diet – PepsiCo and Coca-Cola launch mini cans
- CSDs can offer a sophisticated and indulgent alternative to alcoholic drinks

Sustainability matters: will the backlash against single-use plastic bottles impact brands' pack choices?

- Governments and market players are making pledges to take action in tackling the packaging pollution problem
- The CSD industry is under pressure to take action in tackling the packaging waste problem
- At-home carbonation systems can help consumers reduce their usage of single-use soft drink packaging
- Branded CSD refill stations can help consumers to reduce the use of single-use packaging

IN FIVE YEARS AND BEYOND

- Mintel's perspective
- Pairing CSDs with foods can deliver a more sophisticated image
- CSD brands need to educate consumers about food pairing possibilities
- Can CSD connoisseurship help this category reach new heights?
- Despite its uncertain status, CBD is likely to make its mark on the CSD sector with leading brands expected to develop strategies here

KEY MARKET DATA

- Top countries by per capita consumption
- Top countries by per capita consumption
 - Graph 2: carbonated soft drinks, retail market volume consumption per capita, top 10 countries, 2018
- Carbonated soft drinks launches – top five countries
 - Graph 3: new carbonated soft drinks, by top countries, Dec 2017-Nov 2018
- Top claims on new carbonated soft drinks launches globally
 - Graph 4: new carbonated soft drinks launches, by top claims, Dec 2017-Nov 2018
- Top flavours in new global carbonated soft drink launches
 - Graph 5: new carbonated soft drinks launches, by top flavours, Dec 2017-Nov 2018
- Top pack material used for new carbonated soft drinks launches globally
 - Graph 6: new carbonated soft drinks launches, by pack material, Dec 2017-Nov 2018

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