

THE FUTURE OF CARBONATED SOFT DRINKS: 2020

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



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Drink



Report Content

- A look back, and a look ahead

THE BIG STORIES

- Mintel's perspective

Sugar still has a strong influence on new product development

- Globally, average sugar content is falling in CSDs
 - Graph 1: average sugar content (g per 100ml) in CSDs, 2015-19
- Globally, CSD brands are developing various strategies to remain relevant in the face of the sugar backlash
- Addressing sugar concerns with juice blends, stevia and reduced-calorie options
- Carbonated soft drinks are experiencing challenging times due to the backlash against sugar

Sustainability becomes increasingly important

- Soft drink brands are under pressure to meet consumers' environmental expectations
 - Graph 2: new CSD launches with an environmentally friendly package claim, 2015-19
- Soft drink giants are taking environmental concerns seriously
- Actionable sustainability is becoming a key factor for consumers

Permissible Indulgence can drive CSD appeal

- Despite their problems, CSDs have a treat status
 - Graph 3: CSDs are a good way to treat yourself, 2019
- Hybrid products blur the lines between cocktails and CSDs
- Target young consumers with alcohol alternatives offering a sophisticated take on botanicals

IN THE NEXT TWO YEARS

- Mintel's perspective

Functional benefits can increase the appeal of CSDs

- Growing health awareness is impacting the market performance of CSDs in Japan
 - Graph 4: compound annual growth rates of carbonated soft drinks, %, 2013-22
- Natural and fermented drinks like water kefir appeal to those wanting better-for-you drinks
- Botanicals, probiotics and vitamins in CSDs can help brands meet consumer demand for functional drink formulations

Target brain health and relaxation

- Stress and brain health are becoming more of a concern
- Botanicals and adaptogens are emerging to reduce stress and anxiety

The Future of Carbonated Soft Drinks: 2020

- Nootropics aim to enhance brain health and mental performance

Demonstrate environmental consciousness

- Beyond just recycling: consumers are looking for eco-friendly packaging
- Consumers are looking for eco-friendly products and packaging
- At-home drink systems can help consumers reduce their usage of single-use soft drink packaging

IN FIVE YEARS AND BEYOND

- Mintel's perspective
- Drinks with benefits will dominate the CSD category
- CSDs will compete with alcoholic beverages
- Hyper-personalised CSDs tailored to you

KEY MARKET DATA

- Top countries by per capita consumption
- Top claims on new carbonated soft drinks launches globally
 - Graph 5: new carbonated soft drink launches, by top claims, 2019
- Carbonated soft drinks launches – top five countries
- Carbonated soft drinks launches – top five countries
 - Graph 6: new carbonated soft drinks, by top countries, 2019
- Top flavours in new global carbonated soft drink launches
 - Graph 7: new carbonated soft drink launches, by top flavours, 2019
- Top pack material used for new carbonated soft drinks launches globally
 - Graph 8: new carbonated soft drink launches, by pack material, 2019

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