

The Grocer

Focus On: Soft Drinks

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Perhaps more than any other category, soft drinks has been affected by government restrictions on High Fat Salt Sugar products. This January, the HFSS advertising ban went into effect, following restrictions on in-store placement and marketing of products. Already, HFSS has prompted soft drinks manufacturers to reformulate using sugar substitutes – not to mention, the spate of HFSS-compliant innovations. What's the state of the category now, months into the ad ban?

- How much reformulation is still needed?
- Who's leading the way?

Non-sugar solutions: Soft drinks is at the dawn of a new, lower-sugar era. How are brands responding?

- Which brands are driving efforts to reformulate their drinks for HFSS compliance?
- Have any reformulations backfired with consumers?
- Are any brands sticking to their guns on indulgent, real-sugar beverages?
- How has HFSS changed the game for category entrants?

Marketing: Agencies have been forced to go back to the drawing board with fresh new constraints around HFSS advertising.

- How have brands changed their ad strategies to respond to HFSS?
- Which ads stand out for creativity?
- How does this affect ad budget spend and prioritisation of platforms?

Ranging and merchandising: In a very crowded market, retailers must make difficult decisions. Who's doing what?

- How are retailers deciding who gets shelf space?
- Is the calculus changing somewhat, given broader forces (gut health and HFSS) shaping the category?
- Who have been the biggest winners – and losers?
- What strategies are soft drinks makers using to get people to pick up their products?
- Which are the most recognised brands?
- Who is stealing most category share?

Flavour innovation: It's evident from flavours like cream swirl, ice cream and cherry float that nostalgia is one big trend influencing NPD.

- Why are nostalgic and creamy flavours so popular in soda?
- Who else is jumping on the trend?
- What other flavour trends are propelling innovation?

Limited editions: Limited edition sodas are an increasingly used to drive excitement and test out new ideas.

- What are some limited edition soft drinks that have launched in the last year?
- How are they being marketed in store?
- Which retailers are growing category value. And how?

Gut health: Kombucha has long been flying the flag for gut health. How important is it to the broader category?

- Which soft drink types and brands are making gut health a selling point?
- Who are the early leaders?
- Is gut health turning up in any unexpected places – ie. in more mainstream soft drinks?

Other functional drinks: Some brands are pushing the boundaries of functional soft drinks via CBD. What other benefits are driving functional innovation?

- Who are the main players in this broader functional soft drinks category?
- Who has gained most ground in the last year?
- How much mainstream potential do benefits such as lion's mane have?

Hydration: A new form of soft drink is hitting the market – hydration brands that add something to water.

- Who are these brands?
- What's driving consumer interest here?
- How are they marketed and where in store are they being sold?

Recycling: The UK's Deposit Return Scheme kicks in from October 2027.

- How are retailers preparing for DRS?
- Will drinks manufacturers need to change anything?
- How much do consumers care?

Innovation: We will profile four new products or ranges. We need launch date, rsp, and a hi-res picture of each.