

Competitor Strategies in Soft Drinks

August 2022

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INDUSTRY OVERVIEW

Leading carbonates brands maintain dominant position in soft drinks

Consumer shift towards health and wellness brands drives category growth

Carbonates offerings still the leading brands, as low and zero sugar sustains demand

Focus on product innovation and market expansion boost energy drinks brands

Increased product portfolios in emerging markets ensures strong revenues

Fortified/functional beverages beneficial across subcategories

Private label with better for value offerings moving closer to the top 10

M&A activity set to pay dividends for leading companies

KEY PLAYERS

Strategic direction of Coca-Cola, leading player in global soft drinks industry

Coca-Cola's sustainable World Without Waste agenda

Competitors' approach to sustainable product offerings

Bottled water leading packaging innovation and sustainability

Coca-Cola's investments and focus on evolving categories

Countries expected to lead forecast value growth for PepsiCo energy drinks portfolio

Strong value positioning for reduced sugar energy drinks

Less sugar and healthier, functional alternatives more relevant than ever

Leading companies' healthier beverage brand initiatives

Balancing price premiumisation and health positioning

Blurring category lines as Coca-Cola taps into the hard seltzer trend

SodaStream appealing to at-home consumption convenience and sustainability

Suntory "Work Anywhere" marketing campaign

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Key Takeaways: rest of the year

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