
CHART DATA

The data in this report is supplied by leading market analysts who are continually working to improve accuracy, resulting in slightly different samples each year.

This creates an artificial level for trend analysis year-on-year across all channels. However, the sample is adjusted retrospectively and change percentages are accurate, although value and volume data should not be compared to last year's report. Unless otherwise stated all volumes represented are "as sold" not "as drunk".

For ease of use some figures have been rounded to whole numbers. This may result in small discrepancies in chart totals but does not affect the accuracy of the background data. Data is correct at time of going to print.



The Soft Drinks Market

Value	£ millions	% Share	% Change
1 Take-Home	6,068	71.5	2.8
2 On-Premise	2,424	28.5	1.3
Total	8,492	100	2.4

Volume	litrs millions	% Share	% Change
1 Take-Home	7,014	92.7	-2.0
2 On-Premise	556	7.3	-2.0
Total	7,570	100	-2.0

Source: Nielsen Scantrack, MAT 29 Dec 2007, On-Premise Audit, MAT Nov 2007

The Take-Home Soft Drinks Market in Context

Value	£ millions	% Change
1 Soft drinks	6,068	2.8
2 Chocolate	3,324	6.0
3 Snacks	1,741	5.0
4 Sugar	1,229	5.1
5 Toilet tissue	1,005	6.2
6 Yogurt	1,003	5.2
7 Butter and margarine	963	6.5
8 Detergent	956	0.2
9 Instant coffee	591	4.3
10 Tea	557	2.2

Source: ACNielsen Scantrack Impulse, MAT 29 Dec 2007

The On-Premise Soft Drinks Market in Context

Total Brewers	£ millions	% Change
1 Beer	10,509	-3.3
2 Spirits	2,489	0.4
3 Soft drinks	2,424	1.3
4 Wine	1,316	3.7
5 Cider	1,003	12.9
6 FABs	369	-20.3
7 Champagne and sparkling wine	84	48.5
8 Fortified wine	62	-4.1
9 Perry	2	-25.8

Source: ACNielsen On-Premise Audit MAT Nov 2007

Top Marketing Spend by Advertisers

	£ millions	% Change
1 Coca-Cola Great Britain	28.93	-7
2 Britvic Soft Drinks Ltd/Pepsico Intl Ltd	28.48	14
3 GlaxoSmithKline Nutr Healthcare	14.37	5
4 Danone Waters (UK & Ireland) Ltd	5.59	-8
5 Red Bull Company	5.42	17
6 Schweppes Beverages	4.62	33
7 Innocent Ltd	2.84	-9
8 AG Barr plc	2.36	-31
9 Ocean Spray Intl Inc	2.24	228
10 Unilever UK Ltd	2.16	-75

Source: Nielsen Media Research

Top Marketing Spend by Category

Value	£ millions	% Change
1 Adult Drinks	2.79	-8
2 Cola	29.82	-2
3 Dairy Drinks	20.98	-34
4 Dilutes	10.51	20
5 Energy Drinks	15.22	-6
6 Flavoured Carbonates	8.68	-25
7 Fruit Drinks	7.6	-34
8 Pure Juice	14.22	-16
9 Range/Others	6.08	6
10 Smoothies	3.47	-56
11 Water	8.45	-29

Source: Nielsen Media Research: Ad Dynamix

Top Marketing Spend by Brand

	£ millions	% Change
1 Coca-Cola – Diet Coke	7.73	296
2 Coca-Cola – Original Coke	7.59	3
3 Pepsi – Max	6.8	6
4 Coca-Cola – Coca-Cola Zero	6.03	13
5 Lucozade – Energy Drink	5.6	93
6 Red Bull – Drink	5.39	35
7 Tropicana – Pure Premium Prod Range	5.14	522
8 Ribena – Drinks Range	5.02	14
9 Innocent – Smoothies	2.82	1
10 Robinsons – Fruit Shoot	2.72	431

Source: Nielsen Media Research

Total Take-Home Sub-category Performance

Value	£ millions	% share	% change
1 Cola	1,248	21	2
2 Cold hot drinks	7	0	-23
3 Dairy and dairy substitute	379	6	-3
4 Fruit carbonates	438	7	-2
5 Glucose stimulant drinks	481	8	25
6 Juice drinks	671	11	1
7 Lemonade	135	2	-2
8 Non-fruit carbonates	146	2	3
9 Plain water	463	8	-3
10 Smoothies	214	4	31
11 Sports drinks	154	3	16
12 Squash	435	7	-7
13 Still juice	1,036	17	5
14 Traditional mixers	108	2	3
15 Water plus	154	3	-11
Total	6,068	100	2.8

Volume	litres millions	% share	% change
1 Cola	1,578	22	1
2 Cold hot drinks	5	0	-21
3 Dairy and dairy substitute	178	3	-5
4 Fruit carbonates	565	8	-7
5 Glucose stimulant drinks	235	3	24
6 Juice drinks	571	8	0
7 Lemonade	496	7	-6
8 Non-fruit carbonates	236	3	2
9 Plain water	1,062	15	-6
10 Smoothies	75	1	36
11 Sports drinks	94	1	15
12 Squash	556	8	-4
13 Still juice	969	14	-4
14 Traditional mixers	177	3	-2
15 Water plus	217	3	-13
Total	7,014	100	-2

Source: Nielsen Scantrack, Total Coverage, MAT 29 Dec 2007

Total Take-Home Carbonated v Still

Value	£ millions	% share	% change
1 Carbonated	2,555	42	5
2 Still	3,513	58	1
Total	6,068		

Volume	litres millions	% share	% change
1 Carbonated	3,287	47	0
2 Still	3,727	53	-4
Total	7,014		

Source: Nielsen Scantrack, Total Coverage, MAT 29 Dec 2007

Total Take-Home Top Suppliers

Value	£ millions	% change
1 CCE	1,591	4
2 Britvic	638	2
3 GlaxoSmithKline	480	6
4 Danone	362	-3
5 Tropicana UK	284	12
6 Red Bull	170	23
7 Innocent	143	47
8 Barrs	119	5
9 Gerber Foods	73	1
10 Nestlé Waters	60	-12

Volume	litres millions	% change
1 CCE	1,677	0
2 Britvic	771	4
3 Danone	391	-8
4 GlaxoSmithKline	276	2
5 Tropicana UK	178	13
6 Barrs	134	3
7 Highland Spring	110	-1
8 Nestlé Waters	88	-13
9 Gerber Foods	75	-4
10 Princes Soft Drinks	73	-10

Source: Nielsen Scantrack, Total Coverage, MAT 29 Dec 2007

Total Take-Home Brands Value

Value	£ millions	% change
1 Coca-Cola	960	2
2 Lucozade	338	14
3 Robinsons	284	2
4 Tropicana	246	10
5 Pepsi-Cola	225	4
6 Red Bull	170	23
7 Innocent	141	46
8 Ribena	140	-8
9 Volvic	139	-6

Total Take-Home Brands Volume

Volume	litres millions	% change
1 Coca-Cola	1,023	0
2 Pepsi-Cola	340	6
3 Robinsons	292	6
4 Volvic	172	-13
5 Lucozade	197	9
6 Schweppes	187	3
7 Evian	172	-3
8 Tropicana	155	10
9 Fanta	124	-9

Source: Nielsen Scantrack, Total Coverage, MAT 29 Dec 2007

Total Take-Home Channel Split

Value	£ millions	% share	% change
1 Out of Town	2,686	44	2
2 High Street	1,380	23	0
2 Convenience	1,994	33	6

Volume	litres millions	% share	% change
1 Out of Town	3,770	54	-2
2 High Street	1,714	24	-5
2 Convenience	1,517	22	1

Source: Nielsen Scantrack, Consumer View, MAT 29 Dec 2007

The Take-Home Channel

Value	£ millions	% share	% change
Grocery Multiples	4,138	68	2
Impulse	1,930	32	4
Total coverage	6,068	100	3

Value	litres millions	% share	% change
Grocery Multiples	5,543	79	-2
Impulse	1,471	21	-2
Total	7,015	100	-2

Source: Nielsen Scantrack, Retail View, MAT 29 Dec 2007

Grocery Multiples Sub-Category Performance

Value	£ millions	% share	% change
1 Cola	717	17	3
2 Cold hot drinks	6	0	-28
3 Dairy and dairy substitute	308	7	-4
4 Fruit carbonates	246	6	-3
5 Gluc. stim. drinks	183	4	25
6 Juice drinks	463	11	-1
7 Lemonade	99	2	-1
8 Non-fruit carbonates	83	2	3
9 Plain water	302	7	-3
10 Smoothies	197	5	29
11 Sports drinks	58	1	27
12 Squash	374	9	-6
13 Still juice	907	22	5
14 Traditional mixers	87	2	5
15 Water plus	110	3	-8
Total soft drinks	4,138	100	2

Volume	litres millions	% share	% change
1 Cola	1,121	20	2
2 Cold hot drinks	4	0	-26
3 Dairy and dairy substitute	142	3	-5
4 Fruit carbonates	413	7	-9
5 Gluc. stim. drinks	124	2	25
6 Juice drinks	453	8	0
7 Lemonade	419	8	-5
8 Non-fruit carbonates	177	3	2
9 Plain water	859	16	-6
10 Smoothies	70	1	35
11 Sports drinks	48	1	27
12 Squash	498	9	-3
13 Still juice	881	16	-5
14 Traditional mixers	153	3	-2
15 Water plus	181	3	-10
Total soft drinks	7,014	100	-2

Source: Nielsen Scantrack, Grocery Multiples, MAT 29 Dec 2007

Impulse Sub-Category Performance

Value	£ millions	% share	% change
1 Cola	531	27	1
2 Cold hot drinks	2	0	1
3 Dairy and dairy substitute	70	4	3
4 Fruit carbonates	192	10	-1
5 Gluc. stim. drinks	299	15	25
6 Juice drinks	209	11	3
7 Lemonade	36	2	-6
8 Non-fruit carbonates	62	3	4
9 Plain water	161	8	-5
10 Smoothies	17	1	52
11 Sports drinks	97	5	10
12 Squash	61	3	-8
13 Still juice	129	7	4
14 Traditional mixers	20	1	-2
15 Water plus	45	2	-17
Total soft drinks	1,930	100	4

Volume	litres millions	% share	% change
1 Cola	457	31	0
2 Cold hot drinks	1	0	10
3 Dairy and dairy substitute	36	2	-4
4 Fruit carbonates	152	10	-3
5 Gluc. stim. drinks	111	8	23
6 Juice drinks	118	8	0
7 Lemonade	77	5	-10
8 Non-fruit carbonates	59	4	2
9 Plain water	203	14	-7
10 Smoothies	5	0	49
11 Sports drinks	46	3	5
12 Squash	58	4	-9
13 Still juice	88	6	-4
14 Traditional mixers	24	2	-5
15 Water plus	37	2	-23
Total soft drinks	7,014	100	-2

Source: Nielsen Scantrack, Total Impulse, MAT 29 Dec 2007

The Impulse Channel Split

Value	£ millions	% share	% change
1 Co-ops and Symbols	717	37	6
2 Total Multiples Forecourts	257	13	-2
3 Total Mult Split Offs GB	48	2	-1
4 Independents	790	41	5
5 Other Impulse Multiples	119	6	2
Total Impulse GB	1,930	100	4

Volume	litres millions	% share	% change
1 Co-ops and Symbols	657	45	0
2 Total Multiples Forecourts	0	10	-11
3 Total Mult Split Offs GB	0	3	-10
4 Independents	0	38	-1
5 Other Impulse Multiples	0	5	-3
Total Impulse GB	1,471	100	-2

Source: Nielsen Scantrack, Total Impulse, MAT 29 Dec 2007

Take-Home Deferred vs Immediate

Value	£ millions	% share	% change
1 Deferred	4,188	69	1
2 Immediate	1,880	31	7

Volume	litres millions	% share	% change
1 Deferred	5,965	85	-3
2 Immediate	1,049	15	2

Source: Nielsen Scantrack, Total Coverage, MAT 29 Dec 2007

Take-Home Diet v Regular

Value	£ millions	% share	% change
1 Diet	1,358	22	-2
2 Regular	4,710	78	4

Volume	litres millions	% share	% change
1 Diet	1,985	28	-2
2 Regular	5,029	72	-2

Source: Nielsen Scantrack, Total Coverage, MAT 29 Dec 2007

Total On-Premise Sub-Category Performance

Value	£ millions	% share	% change
1 Cola	1,007	42	4
2 Lemonade	451	19	1
3 Fruit juice	140	6	-4
4 Mixers	164	7	-1
5 Juice drinks	246	10	2
6 Squash	171	7	1
7 Energy	118	5	-4
8 Flavoured carbs (excluding energy)	53	2	-13
9 Bottled water	76	3	2
Total soft drinks	2,424	100	1.3

Volume	litres millions	% share	% change
1 Cola	269	48	0
2 Lemonade	120	22	-4
3 Fruit juice	23	4	-2
4 Mixers	27	5	-4
5 Juice drinks	45	8	-2
6 Squash	17	3	-6
7 Energy	16	3	-7
8 Flavoured carbs (excluding energy)	17	3	-15
9 Bottled water	21	4	-4
Total soft drinks	556	100	-2

Source: Nielsen On-Premise Audit, Total Brewers, MAT Nov 2007

On-Premise Suppliers

Value	£ millions	% share	% change
1 Britvic	1,079	44	2
2 CCE	846	35	3
3 Other	499	21	-3
Total soft drinks	2,424	100	1.3

Volume	litres millions	% share	% change
1 Britvic	237	43	-2
2 CCE	204	37	-1
3 Other	115	21	-7
Total soft drinks	556	100	-2

Source: Nielsen On-Premise Audit, Total Brewers,
MAT Nov 2007

Top On-Premise Brands – Value

Value	£ millions	% change
1 Coca Cola	480	2
2 Pepsi	457	6
3 R Whites	189	0
4 J20	183	5
5 Schweppes Lemonade	178	6
6 Red Bull	105	1
7 Schweppes Mixer	74	5
8 Britvic Mixer	73	-4
9 Britvic Squash	63	1
10 Britvic Juice	50	-10

Source: Nielsen On-Premise Audit, Total Brewers,
MAT Nov 2007

Top On-Premise Brands – Volume

Volume	£ millions	% change
1 Coca Cola	130	-1%
2 Pepsi	17	2%
3 R Whites	49	-5%
4 Schweppes Lemonade	45	2%
5 J20	32	1%
6 Red Bull	13	-3%
7 Schweppes Mixer	12	0%
8 Britvic Mixer	11	-7%
9 Britvic Juice	7	-11%
10 Britvic Squash	7	-4%

Source: Nielsen On-Premise Audit, Total Brewers,
MAT Nov 2007

Total On-Premise Channel Split

Value	£ millions	% share	% change
1 Managed Pub Chains	749	31	3
2 Leased/Tenanted Pubs	786	32	4
3 Independents	890	37	-2
Total	2,424	100	1.3

Volume	litres millions	% share	% change
1 Managed Pub Chains	148	27	0
2 Leased/Tenanted Pubs	172	31	1
3 Independents	236	42	-6
Total	556	100	-2

Source: Nielsen On-Premise Audit, Channel View, MAT Nov 2007

Total Brewers Draught vs Packaged

Value	£ millions	% share	% change
1 Draught	1,297	53	4
2 Packaged	1,127	47	-2

Volume	litres millions	% share	% change
1 Draught	337	61	0
2 Packaged	218	39	-6

Source: Nielsen On-Premise Audit, Total Brewers, MAT Nov 2007

Total Brewers Diet vs Regular

Value	£ millions	% share	% change
1 Diet	489	20	7
2 Regular	1,935	80	0

Volume	litres millions	% share	% change
1 Diet	126	23	3
2 Regular	430	77	-4

Source: Nielsen On-Premise Audit, Total Brewers, MAT Nov 2007

Total Brewers Carbonated vs Still

Value	£ millions	% share	% change
1 Carbonated	1,794	74	2
2 Still	631	26	0

Volume	litres millions	% share	% change
1 Carbonated	450	81	-2
2 Still	106	19	-3

Source: Nielsen On-Premise Audit, Total Brewers, MAT Nov 2007

HORECA and Leisure Sub-Channel Performance – Value

Value	Value latest MAT	% change	Actual change
1 Workplace Catering	62.4	21.2	10.9
2 Education	38.6	8.2	2.9
3 Hotels	31.9	9.9	2.9
4 Travel & Leisure	30.4	7.2	2.1
5 Fast Food and Cafes	30.1	12.8	3.4
6 Health and Welfare	26.3	8.6	2.1
7 Restaurants	23.9	6.2	1.4

Source: Nielsen Delivered Catering Wholesale, MAT Dec 2007

HORECA and Leisure Delivered Catering Wholesale Sub-Category Performance

Value	Value latest MAT	% change	Actual change
1 Cola	32.2	12	3.4
2 Lemonade	1.4	-1.8	0
3 Energy drinks	22.7	17.5	3.4
4 Flavoured water	5.5	-15.9	1
5 Fruit drinks	38.9	3.5	1.3
6 Fruit juice	65.3	21.6	11.6
7 Mixers	0.4	13.3	0
8 Other carbonates	18.2	9.6	1.6
9 Sparkling water	7.1	15.9	1.0
10 Squash	11.5	0.4	0
11 Still water	22.1	11.5	3.4
Grand Total	236.3	11.7	24.8

Source: Nielsen Delivered Catering Wholesale, MAT Dec 2007