



Concentrates in the United Kingdom

November 2025

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Concentrates in the United Kingdom - Category analysis

KEY DATA FINDINGS

2025 PERFORMANCE

Sales of concentrates decline as consumers shift to alternative soft drinks

INDUSTRY PERFORMANCE

Coffee concentrates one of the few bright spots for the category

Powder concentrates sees polarised demand

WHAT'S NEXT?

Health-driven reformulation and functional innovation shaping future demand

Digital transformation and product innovation

Regulatory shifts and sustainability focus

COMPETITIVE LANDSCAPE

Carlsberg now the leading force in concentrates following its acquisition of Britvic

Nescafé launches cold brew coffee product while private label

CHANNELS

Distribution landscape remains largely unchanged

E-commerce playing a growing role in the market

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Soft Drinks in the United Kingdom - Industry Overview

EXECUTIVE SUMMARY

Sales of soft drinks rise in 2025 with the focus on health and affordability

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Ongoing price pressures push players to innovate to maintain demand

Health, wellness and sustainability prominent drivers of new product development

Guilt-free indulgence a key trend in 2025

WHAT'S NEXT?

New product development and innovation likely to remain key growth drivers

Players set to lean on digital technology in a rapidly evolving market

New and forthcoming regulation set to impact company strategies within soft drinks

COMPETITIVE LANDSCAPE

Coca-Cola retains a strong lead in soft drinks thanks to its broad brand portfolio

Monster Energy thriving while smaller players gain prominence in niche areas of the market

CHANNELS

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