



Carbonates in the United Kingdom

November 2025

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KEY DATA FINDINGS

2025 PERFORMANCE

New product development and innovation fuels a return to growth for carbonates

INDUSTRY PERFORMANCE

Daring limited editions feed the need for excitement and indulgence
The search for healthier options boosts sales of other non-cola carbonates

WHAT'S NEXT?

Healthy and natural ingredients set to be a focus of new product development
Social media, personalisation and digital innovation will be key differentiators
Carbonates go green: brands accelerate their sustainability efforts across the value chain

COMPETITIVE LANDSCAPE

Coca-Cola retains its strong lead in 2025
Britvic thriving thanks to investment in innovative new products and flavours

CHANNELS

Hypermarkets and supermarkets continue to dominate the distribution landscape
Promotions remain a key focus of retailers in 2025 while on-trade sales benefit from zebra striping trend

CATEGORY DATA

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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

Affordability remains a key issue as supermarkets and hypermarkets dominate sales
Foodservice playing a key role in driving retail growth and innovation

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