

# DATA

**EAT.**  
THE REAL FOOD COMPANY

**Smith's**

Sainsbury's  
Try something new today

**Waitrose**  
27 Queens Road  
Buckhurst Hill  
Essex  
IG9 5EP  
Telephone no.  
www.waitrose.co.uk

3/16/09 13:55  
SUB-TOTAL 0.90  
MULTIBUY SAVINGS  
STABLE DRINKS 2 FOR £1.60 -0.50  
TOTAL SAVINGS 0.40  
TOTAL 1.30

SUB-TOTAL 3.  
MULTIBUY SAVINGS  
KNORR STOCKPOT BS 2FOR£2 -1.96  
TOTAL SAVINGS -1.96  
TOTAL TO PAY 28.69  
NEWSPAPERS 0.80  
TOTAL 29.49  
BAG RE-USE \* £0.00 0.00  
TOTAL 29.49  
VISA DEBIT SALE 29.49

AID : A0000000031010  
NUMBER : \*\*\*\*\*2129 ICC  
PAN SEQ NO : 07  
AUTH CODE : 805320  
MERCHANT : 46246942  
START : 11/09 EXPIRY : 11/11  
Cardholder PIN Verified  
CHANGE DUE

CLUBCARD STATEMENT  
CARD NUMBER 6340040220039  
THIS VISIT  
EXTRA POINTS  
CLUBCARD BAG RE-USE  
12/11/09  
CARD POINT

TABLE  
SPEC FIVE Starters 10.50 21.00  
ROAST BEEF MULTIFLOWER CHEESE Main Course 16.50 33.00  
SPECIAL DESSERT Desserts 36.75 73.50  
LPG STILL WATER 6.00  
GLASS CABALLETTA MERLOT 4.00  
GORDONS GIN 4.75  
TONIC WATER 2.75  
GLASS CHATEAU NEUF DU PAPE Wine & Bar 1.00 6.50  
TOTAL 19.00

**TOTAL**  
THANK YOU  
001-001-4240-0001 07/09  
Tel: (01273) 365578  
**SERVICE CHA**  
YOUR F

BOTTLED SQUASH \*  
BOTTLED SQUASH \*  
FRESH MILK  
1 BANANA PACK  
VEGET MUSH  
FINEST HAM  
FINEST HAM  
FINESST JTV  
GREEN PEPPER  
CROSTETTE PACK  
MAGAZINES  
NEWSPAPERS

**TESCO**  
EPPING 0845 677 9255  
FRESH MILK  
BOTTLED SQUASH \* 2 @ 1.64  
SD BAGUETTE 1.05  
DRESSED CRAB 2.10  
GALAPORK PIE 0.65  
LA BREA 4.29  
GOATS CHEESE 0.74  
GOATS CHEESE 1.59  
FINEST HAM 0.89  
FINEST HAM 0.85  
BACON RASHER 2.65  
NEWSPAPERS 2.65  
SUB-TOTAL 17.72

TOTAL  
MULTIBUY SAVINGS  
2 FOR £4.00  
SQUASH \*  
TOTAL

MULTIBUY SAVING  
FIN\* 2 FOR £4.00  
ROBS SQUASH 1LTR 2 F 1.50  
TOTAL

www.softdrinksreport.com

DATA



**The Old Boat House**  
Cotswold Water Park  
01285 864111  
CHECK #134652

Server: Kris  
Table: DRINKS Covers: 99  
12/11/2009 12:04 AM

- 1 Seal Still Water
- 1 Lime Cordial
- 18 Pt Guinness
- 1 Smirnoff Vodka
- 1 Gordons Gin
- 1 Diet Tonic
- 1 Diet Tonic
- 1 Budweiser
- 1 Ginger Ale
- 1 J20 Orange - Passionfruit
- 1 Tonic
- 1 Woods Dark Rum
- 1 Dash Pepsi
- 1 Pt Cobra
- 1 Tonic
- 1 J20 Apple - Rasp
- 1 Diet Tonic
- 1 Becard
- 1 Tonic

48.00  
8.00  
0.00  
0.50  
60.30  
92.40  
63.75  
79.05  
1.50  
71.35  
4.50  
4.00  
2.95  
1.00  
10.20  
1.50  
12.00  
1.90

STATEMENT

4402200397012\* 35  
BAG RE-USE 4  
10/05/09 1021  
SUBCARD POINTS 1

FOR SCHOOLS CLUBS 2009

**Junico**  
Pizzeria  
30 Y STREET, EPPING

TOTAL

Handwritten total: 128.50

VAT DRIVE THRU £19.14  
CREDIT/DEBIT CARD Amount Due £0.00

PURCHASE

KFC Beckton  
32 Goldsworth Road  
Woking, Surrey GU24 0JH  
Tel: 020 8508 1331  
www.kfc.co.uk

Total Fact

Dont TVA (1) 19.6  
Service compris  
HT Service Compris 31.94 Euro

vous remercier de votre visite  
L'etablissement n'accepte plus  
les chèques bancaires  
Merci de votre compréhension  
A bientôt

THE GROVE  
COLETTE'S  
CHANDLERS CROSS  
HERTFORDSHIRE, ENGLAND WD3 4TG  
01923 807807

Check 402 /1  
Guests 4  
Open: 08:17 pm  
Colettes

- TARTAR £0.00
- SCALLOP £0.00
- RABBIT £0.00
- COLLETTE £0.00
- CHEESE SUPPLEMENT £240.00
- COLETTE'S DINNER £0.00
- BRILL £0.00
- LAMB £0.00
- DARK CHERRIES £14.50
- LOUIS ROEDERER BRUT GL £6.90
- DIET BOTTLE £10.50
- PLYMOUTH tonic bt1
- TANQUERAY slimline bt1 £44.00
- ISABEL SAUVIGNON GLS £9.30
- EVIAN £7.50
- 10YR TAWNY GL

W

STOCK

# DATA INTRODUCTION

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

## The Soft Drinks Market

| Value        | £<br>millions      | %<br>share | %<br>change |
|--------------|--------------------|------------|-------------|
| Take-Home    | 6,191              | 72         | 2           |
| On-Trade     | 2,369              | 28         | 3           |
| <b>Total</b> | <b>8,560</b>       | <b>100</b> | <b>2</b>    |
| Volume       | litres<br>millions | %<br>share | %<br>change |
| Take-Home    | 6,934              | 93         | 1           |
| On-Trade     | 515                | 7          | -1          |
| <b>Total</b> | <b>7,449</b>       | <b>100</b> | <b>1</b>    |

Source: Nielsen Scantrack, MAT 26 December 2009, On-Premise Audit  
Total Brewers MAT November 2009

## Soft Drinks In Context – Take-Home

|                      | £<br>millions | %<br>change |
|----------------------|---------------|-------------|
| Soft drinks          | 6,219         | 2           |
| Wine                 | 5,143         | 7           |
| Beer                 | 4,079         | 4           |
| Chocolate            | 3,492         | 4           |
| Spirits              | 3,186         | 6           |
| Snacks               | 2,003         | 6           |
| Yogurt               | 1,411         | 3           |
| Sugar                | 1,212         | -1          |
| Butter and margarine | 1,158         | 0           |
| Toilet tissue        | 1,056         | 2           |
| Laundry detergents   | 982           | 2           |
| Instant coffee       | 660           | 9           |
| Tea                  | 598           | 8           |

Source: ACNielsen Scantrack, MAT 26 December 2009

## Soft Drinks In Context – On-Trade

| Total Brewers                | £<br>millions | %<br>change |
|------------------------------|---------------|-------------|
| Beer                         | 7,984         | -5          |
| Soft drinks                  | 2,369         | 3           |
| Spirits                      | 2,015         | -1          |
| Wine                         | 1,188         | 1           |
| Cider                        | 944           | 4           |
| FABS                         | 239           | -12         |
| Champagne and sparkling wine | 59            | 0           |
| Fortified Wine               | 45            | -1          |
| Perry                        | 1             | 39          |

Source: ACNielsen On-Premise Audit MAT November 2009

# TAKE-HOME

## Total Sub-Category Performance

| Value                         | £<br>millions | %<br>share | %<br>change |
|-------------------------------|---------------|------------|-------------|
| 1 Cola                        | 1,354         | 22         | 4           |
| 2 Pure juice                  | 1,163         | 19         | -4          |
| 3 Glucose/stimulant drinks    | 567           | 9          | 7           |
| 4 Juice drinks                | 501           | 8          | 3           |
| 5 Squash                      | 476           | 8          | 7           |
| 6 Fruit carbonates            | 452           | 7          | 4           |
| 7 Plain water                 | 424           | 7          | 0           |
| 8 Dairy and dairy substitutes | 406           | 7          | 4           |
| 9 Sports drinks               | 164           | 3          | -2          |
| 10 Non-fruit carbonates       | 158           | 3          | 6           |
| 11 Water plus                 | 157           | 3          | 4           |
| 12 Lemonade                   | 148           | 2          | 4           |
| 13 Smoothies                  | 127           | 2          | -27         |
| 14 Traditional mixers         | 115           | 2          | 3           |
| 15 Cold hot drinks            | 8             | 0          | -8          |
| <b>Total Soft Drinks</b>      | <b>6,219</b>  | <b>100</b> | <b>+2</b>   |

| Volume                         | litres<br>millions | %<br>share | %<br>change |
|--------------------------------|--------------------|------------|-------------|
| 1 Cola                         | 1,674              | 24         | 3           |
| 2 Pure juice                   | 1,104              | 16         | -4          |
| 3 Plain water                  | 1,005              | 15         | 3           |
| 4 Fruit carbonates             | 537                | 8          | 0           |
| 5 Squash                       | 523                | 8          | -3          |
| 6 Lemonade                     | 466                | 7          | -3          |
| 7 Juice drinks                 | 380                | 6          | 1           |
| 8 Glucose/stimulant drinks     | 274                | 4          | 7           |
| 9 Non-fruit carbonates         | 235                | 3          | 3           |
| 10 Water plus                  | 233                | 3          | 9           |
| 11 Dairy and dairy substitutes | 186                | 3          | 7           |
| 12 Traditional mixers          | 175                | 3          | 1           |
| 13 Sports drinks               | 107                | 2          | 4           |
| 14 Smoothies                   | 47                 | 1          | -27         |
| 15 Cold hot drinks             | 4                  | 0          | -21         |
| <b>Total Soft Drinks</b>       | <b>6,949</b>       | <b>100</b> | <b>+1</b>   |

Source: ACNielsen Scantrack, MAT 26 December 2009

## Total Carbonated v Still

| Value      | £<br>millions      | %<br>share | %<br>change |
|------------|--------------------|------------|-------------|
| Carbonated | 2795               | 45         | 5           |
| Still      | 3424               | 55         | -1          |
| Volume     | litres<br>millions | %<br>share | %<br>change |
| Carbonated | 3361               | 48         | 2           |
| Still      | 3588               | 52         | 0           |

Source: Nielsen Scantrack, MAT 26 December 2009

# TAKE-HOME

## Total Top Suppliers

| Value |                 | £<br>millions | %<br>change |
|-------|-----------------|---------------|-------------|
| 1     | CCE             | 1,710         | 4           |
| 2     | Britvic         | 728           | 6           |
| 3     | GlaxoSmithKline | 468           | -3          |
| 4     | Danone          | 325           | -3          |
| 5     | Tropicana UK    | 301           | -7          |
| 6     | Red Bull        | 186           | 0           |
| 7     | Barrs           | 160           | 9           |
| 8     | Innocent        | 107           | -4          |
| 9     | Gerber Foods    | 63            | -13         |
| 10    | Nestle Waters   | 63            | 12          |

| Volume |                     | litres<br>millions | %<br>change |
|--------|---------------------|--------------------|-------------|
| 1      | CCE                 | 1,725              | 1           |
| 2      | Britvic             | 847                | 2           |
| 3      | Danone              | 350                | 1           |
| 4      | GlaxoSmithKline     | 271                | -2          |
| 5      | Tropicana UK        | 186                | -9          |
| 6      | Barrs               | 178                | 8           |
| 7      | Highland Spring     | 111                | 1           |
| 8      | Nestle Waters       | 109                | 32          |
| 9      | Princes Soft Drinks | 94                 | 34          |
| 10     | Gerber Foods        | 58                 | -17         |

Source: Nielsen Scantrack, MAT 26 December 2009

## Top Brands

| Value |            | £<br>millions | %<br>change |
|-------|------------|---------------|-------------|
| 1     | Coca-Cola  | 1,018         | 4           |
| 2     | Lucozade   | 339           | -3          |
| 3     | Robinsons  | 307           | 2           |
| 4     | Pepsi Cola | 271           | 5           |
| 5     | Tropicana  | 270           | -6          |
| 6     | Red Bull   | 186           | 0           |
| 7     | Ribena     | 127           | -3          |
| 8     | Schweppes  | 126           | 4           |
| 9     | Actimel    | 116           | 7           |
| 10    | Volvic     | 111           | -7          |

Source: Nielsen Scantrack, MAT 26 December 2009

## Top Brands

| Volume |                 | litres<br>millions | %<br>change |
|--------|-----------------|--------------------|-------------|
| 1      | Coca-Cola       | 1,079              | 4           |
| 2      | Pepsi Cola      | 393                | 3           |
| 3      | Robinsons       | 301                | -5          |
| 4      | Lucozade        | 201                | -0          |
| 5      | Schweppes       | 181                | -8          |
| 6      | Tropicana       | 170                | -8          |
| 7      | Volvic          | 152                | 1           |
| 8      | Evian           | 151                | -2          |
| 9      | Highland Spring | 111                | 1           |
| 10     | Fanta           | 110                | -10         |

Source: Nielsen Scantrack, Total Coverage, MAT 26 December 2009

## Total Take-Home Split

| Value |             | £<br>millions | %<br>share | %<br>change |
|-------|-------------|---------------|------------|-------------|
| 1     | Out of town | 2,827         | 46         | 3           |
| 2     | Convenience | 2,020         | 33         | 2           |
| 3     | High street | 1,369         | 22         | -1          |

| Volume |             | litres<br>millions | %<br>share | %<br>change |
|--------|-------------|--------------------|------------|-------------|
| 1      | Out of town | 3,760              | 54         | 1           |
| 2      | High street | 1,661              | 24         | -1          |
| 3      | Convenience | 1,516              | 22         | 2           |

Source: Nielsen Scantrack, MAT 26 December 2009

## The Take-Home Channel

| Value                 |                   | £<br>millions | %<br>share | %<br>change |
|-----------------------|-------------------|---------------|------------|-------------|
| 1                     | Grocery multiples | 4,382         | 70         | 4           |
| 2                     | Impulse           | 1,837         | 30         | -3          |
| <b>Total coverage</b> |                   | <b>6,219</b>  | <b>100</b> | <b>+2</b>   |

| Volume                |                   | litres<br>millions | %<br>share | %<br>change |
|-----------------------|-------------------|--------------------|------------|-------------|
| 1                     | Grocery multiples | 5,588              | 80         | 2           |
| 2                     | Impulse           | 1,361              | 20         | -4          |
| <b>Total coverage</b> |                   | <b>6,948</b>       | <b>100</b> | <b>+1</b>   |

Source: Nielsen Scantrack, Retail View, MAT 26 December 2009

# TAKE-HOME

## Grocery Multiples Sub-Category Performance

| Value                        | £ millions   | % share    | % change  |
|------------------------------|--------------|------------|-----------|
| 1 Still juice                | 1,028        | 23         | -3        |
| 2 Cola                       | 850          | 19         | 9         |
| 3 Squash                     | 417          | 10         | 8         |
| 4 Dairy and dairy substitute | 339          | 8          | 6         |
| 5 Juice drinks               | 335          | 8          | 8         |
| 6 Plain water                | 285          | 6          | 3         |
| 7 Fruit carbonates           | 282          | 6          | 10        |
| 8 Glucose/stimulant drinks   | 233          | 5          | 12        |
| 9 Smoothies                  | 116          | 3          | -27       |
| 10 Water plus                | 116          | 3          | 8         |
| 11 Lemonade                  | 112          | 3          | 5         |
| 12 Non-fruit carbonates      | 97           | 2          | 12        |
| 13 Traditional mixers        | 95           | 2          | 4         |
| 14 Sports drinks             | 73           | 2          | 4         |
| 15 Cold hot drinks           | 6            | 0.1        | -16       |
| <b>Total Soft Drinks</b>     | <b>4,382</b> | <b>100</b> | <b>+4</b> |

| Volume                        | litres millions | % share    | % change  |
|-------------------------------|-----------------|------------|-----------|
| 1 Cola                        | 1,243           | 22         | 5         |
| 2 Still juice                 | 1,006           | 18         | -3        |
| 3 Plain water                 | 833             | 15         | 4         |
| 4 Squash                      | 469             | 8          | -3        |
| 5 Fruit carbonates            | 406             | 7          | 2         |
| 6 Lemonade                    | 393             | 7          | -3        |
| 7 Juice drinks                | 295             | 5          | 4         |
| 8 Water plus                  | 201             | 4          | 12        |
| 9 Non-fruit carbonates        | 176             | 3          | 6         |
| 10 Dairy and dairy substitute | 155             | 3          | 10        |
| 11 Traditional mixers         | 153             | 3          | 2         |
| 12 Glucose/stimulant drinks   | 150             | 3          | 9         |
| 13 Sports drinks              | 63              | 1          | 8         |
| 14 Smoothies                  | 43              | 1          | -28       |
| 15 Cold hot drinks            | 3               | 0.1        | -32       |
| <b>Total Soft Drinks</b>      | <b>5,588</b>    | <b>100</b> | <b>+2</b> |

Source: Nielsen Scantrack, MAT 26 December 2009

## Impulse Sub-Category Performance

| Value                        | £ millions   | % share    | % change  |
|------------------------------|--------------|------------|-----------|
| 1 Cola                       | 504          | 27         | -3        |
| 2 Glucose/stimulant drinks   | 334          | 18         | 4         |
| 3 Fruit carbonates           | 170          | 9          | -5        |
| 4 Juice drinks               | 166          | 9          | -4        |
| 5 Plain water                | 139          | 8          | -6        |
| 6 Still juice                | 135          | 7          | -10       |
| 7 Sports drinks              | 92           | 5          | -7        |
| 8 Dairy and dairy substitute | 67           | 4          | -5        |
| 9 Non-fruit carbonates       | 61           | 3          | -3        |
| 10 Squash                    | 59           | 3          | -6        |
| 11 Water plus                | 40           | 2          | -7        |
| 12 Lemonade                  | 37           | 2          | 0         |
| 13 Traditional mixers        | 20           | 1          | -1        |
| 14 Smoothies                 | 11           | 1          | -26       |
| 15 Cold hot drinks           | 2            | 0.1        | 22        |
| <b>Total Soft Drinks</b>     | <b>1,837</b> | <b>100</b> | <b>-3</b> |

| Volume                        | litres millions | % share    | % change  |
|-------------------------------|-----------------|------------|-----------|
| 1 Cola                        | 431             | 32         | -4        |
| 2 Plain water                 | 172             | 13         | -4        |
| 3 Fruit carbonates            | 131             | 10         | -5        |
| 4 Glucose/stimulant drinks    | 124             | 9          | 4         |
| 5 Still juice                 | 98              | 7          | -7        |
| 6 Juice drinks                | 85              | 6          | -6        |
| 7 Lemonade                    | 73              | 5          | -6        |
| 8 Non-fruit carbonates        | 59              | 4          | -5        |
| 9 Squash                      | 54              | 4          | -4        |
| 10 Sports drinks              | 45              | 3          | -2        |
| 11 Water plus                 | 33              | 2          | -6        |
| 12 Dairy and dairy substitute | 31              | 2          | -5        |
| 13 Traditional mixers         | 22              | 2          | -7        |
| 14 Smoothies                  | 4               | 0.3        | -22       |
| 15 Cold hot drinks            | 1               | 0.1        | 39        |
| <b>Total Soft Drinks</b>      | <b>1,361</b>    | <b>100</b> | <b>-4</b> |

Source: Nielsen Scantrack, MAT 26 December 2009

## TAKE-HOME

| Impulse Channel Split           |                 |            |           |  |
|---------------------------------|-----------------|------------|-----------|--|
| Value                           | £ millions      | % share    | % change  |  |
| 1 Co-ops & symbols              | 758             | 41         | 2         |  |
| 2 Independents                  | 704             | 38         | -4        |  |
| 3 Total multiples forecourts    | 197             | 11         | -8        |  |
| 4 Other impulse multiples       | 100             | 5          | -20       |  |
| 5 Total multiples split offs GB | 46              | 3          | -11       |  |
| <b>Total Impulse GB</b>         | <b>1837</b>     | <b>100</b> | <b>-3</b> |  |
| Volume                          | litres millions | % share    | % change  |  |
| 1 Co-ops & symbols              | 664             | 49         | 0         |  |
| 2 Independents                  | 482             | 35         | -4        |  |
| 3 Total multiples forecourts    | 104             | 8          | -9        |  |
| 4 Other impulse multiples       | 59              | 4          | -26       |  |
| 5 Total multiples split offs GB | 40              | 3          | -16       |  |
| <b>Total Soft Drinks</b>        | <b>1,361</b>    | <b>100</b> | <b>-4</b> |  |

Source: Nielsen Scantrack Impulse, MAT 26 December 2009

| Deferred v Immediate |                 |         |          |  |
|----------------------|-----------------|---------|----------|--|
| Value                | £ millions      | % share | % change |  |
| Deferred             | 4,319           | 69      | 2        |  |
| Immediate            | 1,900           | 31      | 0        |  |
| Volume               | litres millions | % share | % change |  |
| Deferred             | 5,868           | 85      | 1        |  |
| Immediate            | 1,080           | 15      | 0        |  |

Source: Nielsen Scantrack, MAT 26 December 2009

## ON-PREMISE

| Total Sub-Category Performance |                 |            |           |  |
|--------------------------------|-----------------|------------|-----------|--|
| Value                          | £ millions      | % share    | % change  |  |
| 1 Cola                         | 982             | 41         | 4         |  |
| 2 Lemonade                     | 437             | 18         | 4         |  |
| 3 Juice drinks                 | 228             | 10         | -2        |  |
| 4 Squash                       | 178             | 8          | 5         |  |
| 5 Mixers                       | 160             | 7          | 1         |  |
| 6 Pure Juice                   | 153             | 6          | 1         |  |
| 7 Energy and sport             | 107             | 4          | -2        |  |
| 8 Water                        | 67              | 3          | -6        |  |
| 9 Flavoured carbonates         | 57              | 2          | 10        |  |
| <b>Total Soft Drinks</b>       | <b>2,369</b>    | <b>100</b> | <b>+3</b> |  |
| Volume                         | litres millions | % share    | % change  |  |
| 1 Cola                         | 249             | 48         | 1         |  |
| 2 Lemonade                     | 112             | 22         | -2        |  |
| 3 Juice drinks                 | 40              | 8          | -4        |  |
| 4 Squash                       | 16              | 3          | 0         |  |
| 5 Mixers                       | 25              | 5          | -3        |  |
| 6 Pure Juice                   | 25              | 5          | -1        |  |
| 7 Energy and sport             | 15              | 3          | -1        |  |
| 8 Water                        | 17              | 3          | -10       |  |
| 9 Flavoured carbonates         | 17              | 3          | 1         |  |
| <b>Total Soft Drinks</b>       | <b>515</b>      | <b>100</b> | <b>-1</b> |  |

Source: Nielsen On-Premise Audit, Total Brewers, MAT November 2009

| On-Premise Suppliers     |                 |            |           |  |
|--------------------------|-----------------|------------|-----------|--|
| Value                    | £ millions      | % share    | % change  |  |
| 1 Britvic                | 1,121           | 47         | 6         |  |
| 2 CCE                    | 783             | 33         | -1        |  |
| 3 Other                  | 465             | 1          | -1        |  |
| <b>Total Soft Drinks</b> | <b>2,369</b>    | <b>100</b> | <b>+3</b> |  |
| Volume                   | litres millions | % share    | % change  |  |
| 1 Britvic                | 236             | 46         | 5         |  |
| 2 CCE                    | 179             | 35         | -6        |  |
| 3 Other                  | 100             | 4          | 5         |  |
| <b>Total Soft Drinks</b> | <b>515</b>      | <b>100</b> | <b>-1</b> |  |

Source: Nielsen On-Premise Audit, Total Brewers, MAT November 2009

# ON-PREMISE

## Top On-Premise Brands

| Value |                           | £<br>millions | %<br>change |
|-------|---------------------------|---------------|-------------|
| 1     | Pepsi Cola                | 475           | 10          |
| 2     | Coca-Cola                 | 446           | -1          |
| 3     | R Whites Lemonade         | 209           | 8           |
| 4     | Britvic J <sub>2</sub> O  | 174           | -2          |
| 5     | Schweppes Lemonade        | 158           | 1           |
| 6     | Red Bull energy           | 92            | -5          |
| 7     | Britvic mixers            | 75            | 7           |
| 8     | Schweppes mixers          | 68            | -4          |
| 9     | Britvic squash/cordials   | 68            | 6           |
| 10    | Britvic pure juice mixers | 54            | 6           |

| Volume |                           | litres<br>millions | %<br>change |
|--------|---------------------------|--------------------|-------------|
| 1      | Pepsi Cola                | 115                | 10          |
| 2      | Coca-Cola                 | 114                | -9          |
| 3      | R Whites Lemonade         | 50                 | 4           |
| 4      | Schweppes Lemonade        | 40                 | -11         |
| 5      | Britvic J <sub>2</sub> O  | 29                 | -6          |
| 6      | Red Bull energy           | 12                 | -5          |
| 7      | Britvic mixers            | 12                 | 6           |
| 8      | Schweppes mixers          | 10                 | -11         |
| 9      | Britvic pure juice mixers | 8                  | 15          |
| 10     | Britvic squash/cordials   | 7                  | 6           |

Source: Nielsen On-Premise Audit, Total Brewers, MAT November 2009

## Total On-Premise Channel Split

| Value | £<br>millions       | %<br>share | %<br>change |   |
|-------|---------------------|------------|-------------|---|
| 1     | Independents        | 886        | 37          | 0 |
| 2     | Lease/tenanted pubs | 751        | 32          | 2 |
| 3     | Managed pub chains  | 732        | 31          | 6 |

|                          |              |            |           |
|--------------------------|--------------|------------|-----------|
| <b>Total Soft Drinks</b> | <b>2,369</b> | <b>100</b> | <b>+3</b> |
|--------------------------|--------------|------------|-----------|

| Volume | litres<br>millions  | %<br>share | %<br>change |    |
|--------|---------------------|------------|-------------|----|
| 1      | Independents        | 221        | 43          | -3 |
| 2      | Lease/tenanted pubs | 156        | 30          | -1 |
| 3      | Managed pub chains  | 138        | 27          | 2  |

|                          |            |            |           |
|--------------------------|------------|------------|-----------|
| <b>Total Soft Drinks</b> | <b>515</b> | <b>100</b> | <b>-1</b> |
|--------------------------|------------|------------|-----------|

Source: Nielsen On-Premise Audit, Total Brewers, MAT November 2009

## Total Brewers Draught v Packaged

| Value    | £<br>millions | %<br>share | %<br>change |
|----------|---------------|------------|-------------|
| Draught  | 1,275         | 54         | 5           |
| Packaged | 1,094         | 46         | 0           |

  

| Volume   | litres<br>millions | %<br>share | %<br>change |
|----------|--------------------|------------|-------------|
| Draught  | 316                | 61         | 1           |
| Packaged | 199                | 39         | -3          |

Source: Nielsen On-Premise Audit, Total Brewers, MAT November 2009

## Total Brewers Low Calorie v Standard

| Value   | £<br>millions | %<br>share | %<br>change |
|---------|---------------|------------|-------------|
| Diet    | 488           | 21         | 5           |
| Regular | 1,881         | 79         | 2           |

  

| Volume  | litres<br>millions | %<br>share | %<br>change |
|---------|--------------------|------------|-------------|
| Diet    | 120                | 23         | 2           |
| Regular | 395                | 77         | -2          |

Source: Nielsen On-Premise Audit, Total Brewers, MAT November 2009

## Total Brewers Carbonated v Still

| Value      | £<br>millions | %<br>share | %<br>change |
|------------|---------------|------------|-------------|
| Carbonated | 1,745         | 74         | 3           |
| Still      | 624           | 26         | 0           |

  

| Volume     | litres<br>millions | %<br>share | %<br>change |
|------------|--------------------|------------|-------------|
| Carbonated | 418                | 81         | 0           |
| Still      | 97                 | 19         | -4          |

Source: Nielsen On-Premise Audit, Total Brewers, MAT November 2009

## HORECA and Leisure Sub-Channel Performance – Value

|                     | £<br>millions | %<br>change |
|---------------------|---------------|-------------|
| Work place catering | 59            | -5          |
| Fast food and cafes | 34            | 12          |
| Education           | 33            | -5          |
| Travel and leisure  | 29            | -1          |
| Hotels              | 28            | -10         |
| Health and welfare  | 26            | -6          |
| Restaurants         | 23            | 2           |

Source: Nielsen Delivered Catering Wholesale, MAT December 2009

## HORECA and Leisure Sub-Category Performance – Value

|                  | £<br>millions | %<br>change |
|------------------|---------------|-------------|
| Fruit juice      | 69            | -3          |
| Fruit drinks     | 40            | 3           |
| Cola             | 34            | 6           |
| Still water      | 27            | -10         |
| Energy drinks    | 22            | -8          |
| Other carbonates | 17            | -1          |
| Squash           | 10            | -6          |
| Sparkling water  | 6             | -10         |
| Flavoured water  | 3             | -13         |
| Lemonade         | 2             | 9           |
| Mixers           | 1             | 49          |
| <b>Total</b>     | <b>231</b>    | <b>-3</b>   |

Source: Nielsen Delivered Catering Wholesale, MAT December 2009

# DEFINITIONS/GLOSSARY

## CARBONATES

A drink made predominantly from carbonated water to which juice or flavourings have been added.

## COLA

Cola-flavoured carbonated drinks, including cola with flavours such as cherry, twist of lemon, etc. Includes all clear and coloured colas.

## FRUIT CARBONATES

Fruit flavoured carbonated drinks. Flavours are typically orange, cherry, lime, blackcurrant, apple, pineapple and grapefruit, lemon, lemon and lime, tropical and other mixed fruit flavours. Also includes Tizer, Dr Pepper and Vimto, as these brands now contain fruit.

## NON-FRUIT CARBONATES

Non-fruit flavoured carbonates, excluding cola but including the unique Irn Bru. Also includes traditionals such as cream soda, ginger beer and shandy.

## LEMONADE

All conventional clear and cloudy or traditional, carbonated lemonade. Flavoured with lemon juice and additional fruit flavours to produce coloured lemonade.

## GLUCOSE AND STIMULANT DRINKS

All "energy boosting" drinks such as Red Bull and Red Devil, normally fizzy.

## SPORTS DRINKS

Drinks that are specifically designed to replace minerals, sugars, trace elements and fluids as a result of exercise. Can include dilutables and powders.

## SQUASH

Concentrated beverage, commonly called squash, cordial or syrup. Must be diluted prior to consumption.

## MIXERS

All drinks intended to dilute an alcoholic beverage, as well as being consumed as a solus soft drink.

## COLD HOT DRINKS

Includes cold soft drinks that are tea and coffee based such as Lipton Ice Tea.

## SMOOTHIES

Generally drinks described as smoothie, either in brand name or as a descriptor on the packaging. Drinks described as thickie will also be included.

## DAIRY DRINKS

Ready to drink milk or milk substitute to which flavouring or juice has been added. May consist of any type of milk regardless of fat content.

## JUICE DRINKS

A non-carbonated drink which generally contains fruit juice (some may not) plus added water or other ingredients.

## PURE JUICE

A non-carbonated 100% pure juice or other juice blend with no added water or sweetener, which may be chilled or long-life. Includes all concentrated juices, with the exception of frozen juice.

## PLAIN WATER

Still or sparkling water with nothing else added.

## WATER PLUS

Sparkling or still flavoured water, or functional water (excluding sports water).

## HORECA/FOODSERVICE

Hotels, restaurants and catering.

## DATA SOURCES

All sources are indicated in the charts and graphs, and detailed sources are available to all references in the text.

Take-home data relates to MAT 26 December 2009 and is taken from Nielsen's Scantrack Impulse service, which monitors weekly data from EPOS checkout scanners. All sales figures are in £millions, all volumes in million litres.

Nielsen's On-Premise Audit Total Brewers and relates to MAT November 2009. All sales figures are in £millions, all volumes in million litres.

Other data provided by Mintel.

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