

BORD BIA
IRISH FOOD BOARD

Beverage Futures
Playbook Launch

Opinions
clarity and confidence

Introduction

This report is intended to be used as a strategic planning resource for your organisation. The insights are built on a solid foundation of consumer and industry research and the emergent themes represent potential pathways for future innovation in the Irish non-alcoholic beverage sector.

Included in this pack there is a **toolkit** to help you to work with the trends and consider their implications for your business.

If you need support with this as you progress, Bord Bia are on hand to help.

John Talley at IBM believes that for innovation to succeed we need to keep asking “What if?” questions; be unconstrained in our thinking.

We hope that this support tool will encourage you to ask this simple question; “What if?”

Scope

The scope of this project is extensive, uncovering trends that apply to all elements of the **out of home* adult non-alcoholic cold beverage market**; a market this is estimated to be worth €400bn** globally.

This includes everything from soft drinks and kefirs to water and non-alcoholic beers.

This report has been developed to provide inspiration to the industry, a reference guide to emerging trends around the world and to promote innovation in the sector here in Ireland.

- *Out of home accounts for about 41% of global Non Alc Value and 11% of its volume (Statista, 2019)*
- *** Based on a 1.2tn total global NA beverage value*
- *Note: Dairy/ alternatives, and meal replacement not included in scope of this project however insights may be applicable to these sectors*

What we Did

DESK REVIEW

MARKET

EXPERT
INTERVIEWS

INDUSTRY
INTERVIEWS

INDUSTRY

CO-CREATION
COUNCILS
IE, UK

SURVEY
IE, UK, FR, DE, NL, US

CONSUMER

What we did

1. Desk Review

We reviewed an extensive array of third party and information in the public domain related to beverages.

This is considered and reflected throughout the trend's analysis.

2. Expert Interviews

We talked to a mix of local and global experts in the beverage category to get clarity and alignment in relation to current and future trends in the market.

3. Industry

We interviewed a selection of small and large beverage producers to explore their perspective on the industry and the key trends in the future.

5. Consumer Councils

We conducted in total two workshops (Dublin & Manchester) to hear consumers perspectives, understand potential trends and co-create innovations for the future.

5. Future Survey

We surveyed almost 5,000 consumers in 6 countries; IE, UK, FR, DE, NL, US. Included reaction to potential “futures” and attitudinal insights from the markets.

A Big Thank you to our Contributors

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Navigating the Report

Setting the Scene

SECTION ONE: Forces

A brief look at some of the Global Contextual Forces that are shaping consumer behaviours.

SECTION TWO: Consumer Need-scaping

The Introduction of our needscape model of consumer beverage needs.

SECTION THREE: Trends & Expressions

A collection of Trends and Expressions developed to inspire and provoke fresh thinking.

SECTION FOUR: Exploring “Futures”

Consumer response to a selection of potential future beverage scenarios.

SECTION FIVE: Toolkit

LAUNCHING MAY 22nd

A proprietary approach and suite of templates to help you work with the emerging trends.

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Setting the Scene

The Challenge



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With beverage volumes relatively flat overall in Europe and showing limited growth globally, innovation is critical to derive value from a market that is under pressure.

This report seeks to inspire consumer-led innovation to provide a solid future platform for growth for the Irish beverage industry.

Innovation in the world of beverages is a high-risk business, with reported failure rates of 95% for true innovations in this sector. Overall, Harvard and Nielsen put the failure rates at around 90% and according to Mintel, “beverages are in chaos at the moment”.

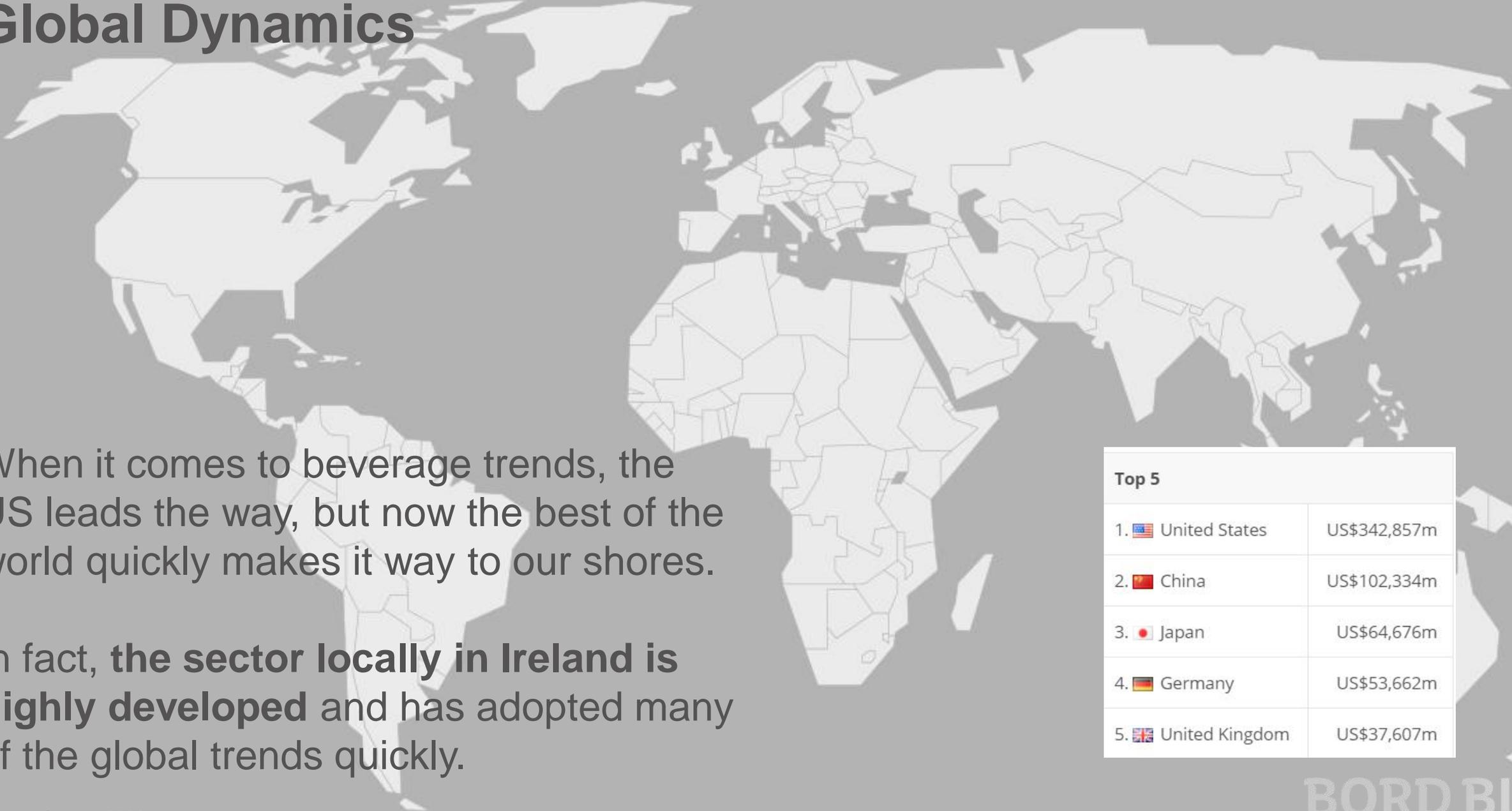
In such a high-activity sector, according to industry experts retailers don't have time to wait and new products are generally only given **a year at most to prove themselves**, so it's critical to get it right.

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60% of global respondents said there are too many options out there to choose from today. This makes it extremely tough for new products to cut through and succeed.

(Opinions/Bord Bia, Global Beverages Study)

Global Dynamics



When it comes to beverage trends, the US leads the way, but now the best of the world quickly makes it way to our shores.

In fact, **the sector locally in Ireland is highly developed** and has adopted many of the global trends quickly.

Top 5

1. 🇺🇸 United States	US\$342,857m
2. 🇨🇳 China	US\$102,334m
3. 🇯🇵 Japan	US\$64,676m
4. 🇩🇪 Germany	US\$53,662m
5. 🇬🇧 United Kingdom	US\$37,607m



We recognise that Brexit represents a vexing parallel threat to indigenous Irish beverage producers who rely heavily on the UK market for exports. The UK accounts for 57% of the total NAB export value, but over **90% of the indigenous producer exports*** (ex MNCs).

It is hoped that this document can provide inspiration to unlock further future value from the UK market into the future and open up opportunities further afield.

* CSO 2020

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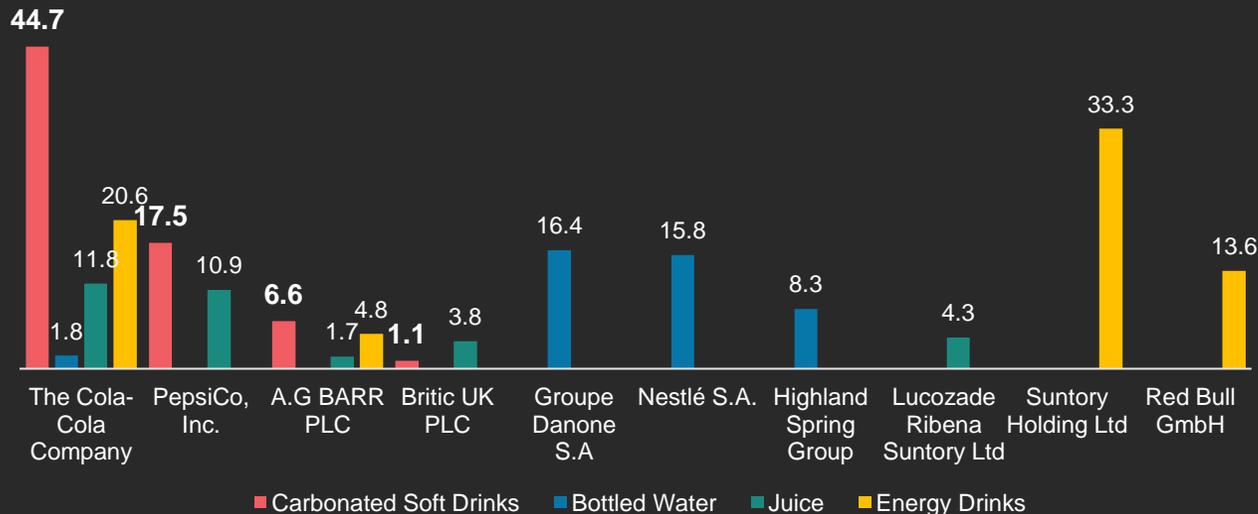
UK Market Profile

The UK, while still seeing forecasted growth is only showing marginal growth rates with higher value propositions offsetting pretty anaemic volume growth. In particular we see a drop-off expected for Juices. In this context higher value propositions will be necessary.

Revenue in the Non-Alcoholic Drinks market amounts to US\$37,607m in 2020. The market is expected to grow annually by 2.0% (CAGR 2020-2023).

(Statista, 2019)

Company retail market share by volume (%)
(UK 2018)



*Source: Mintel Market Sizes, UK 2019

Value in USD Forecast*

Value in USD	Forecast 2023	CAGR 2019 - 2023
Carbonated Soft Drinks	6.2289 bn USD	3.5%
Bottled Water	2.3903 bn USD	4.4%
Juice	2.5975 bn USD	0.3%
Energy Drinks	2.1806 bn USD	2.7%

*Source: Mintel Market Sizes, UK 2019

Total Market Volume Forecast*

Volume	Forecast 2023	CAGR 2019 - 2023
Carbonated Soft Drinks	5,145.4 m litres	1.2%
Bottled Water	3,882.2 m litres	2.1%
Juice	1,558.1 m litres	- 0.6%

*Source: Mintel Market Sizes, UK 2019

Retail Market Volume Forecast*

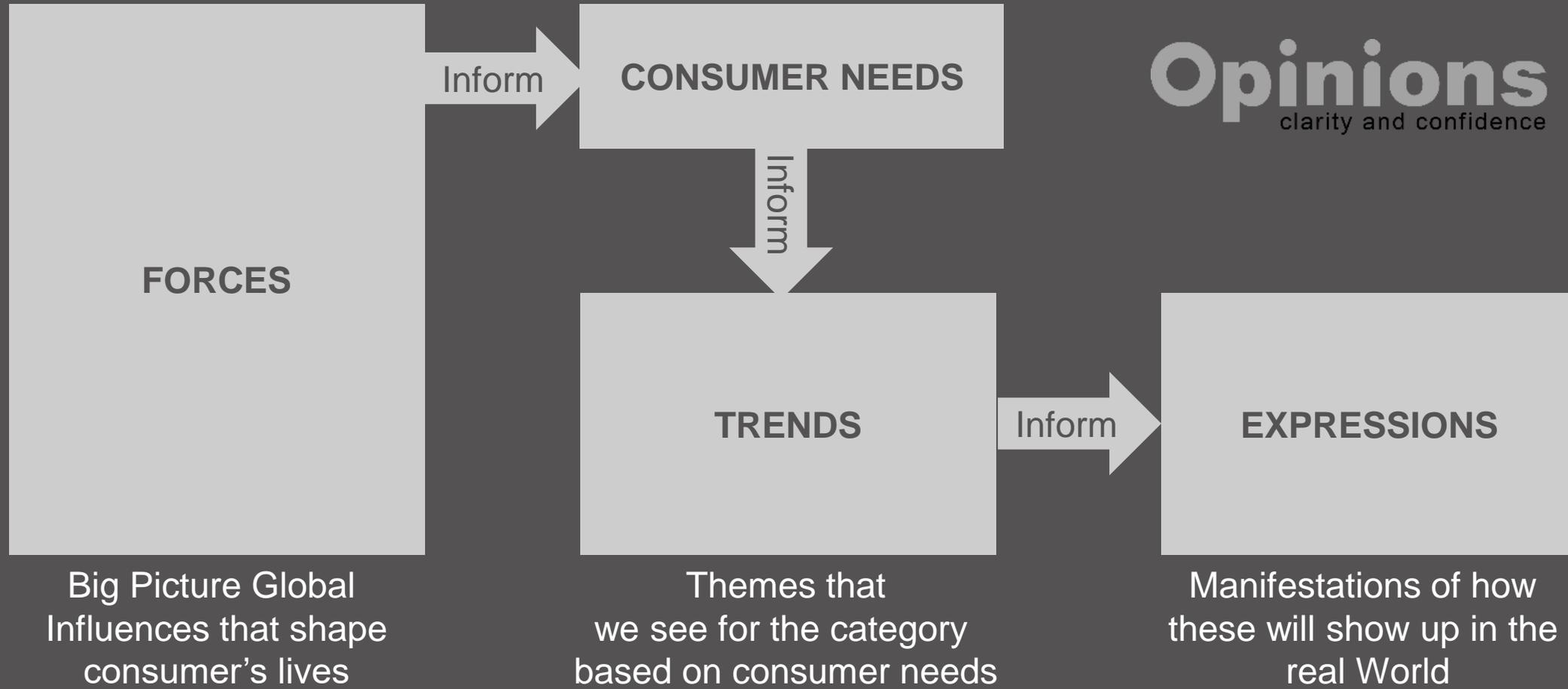
Volume	Forecast 2023	CAGR 2019 - 2023
Carbonated Soft Drinks	3,891.1 m litres	1.3%
Bottled Water	2,927.5 m litres	1.8%
Juice	1,193.3 m litres	- 0.9%
Energy Drinks	680 m litres	1.6%

*Source: Mintel Market Sizes, UK 2019

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Getting Started

The Futures Structure



SECTION ONE

Opinions **Forces**
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Planet



Plastics

**Environmental
Sustainability**



**Keeping it
Real**



Almost 6 in 10 (58%)
of adults worldwide
said they are
concerned by the
impact of beverages
they choose on the
environment.

(Source: Opinions/Bord Bia, Global Beverages Study)

(Picture by Ipopba, Adobe Stock)

Plastics



34 billion plastic bottles that are produced by the soft drink industry enter the ocean each year.

(Source: Oceana, 2020)

(Picture by Snemann, Flickr)

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With the increasing quality of materials, **Recycled PET (rPET)** could reach as much as **55% of total PET demand by 2030** in Europe.

(Source: Global WebIndex, 2019)

(Picture by Mali maeder, Pexels)



70% of global consumers associate local or locally produced products with being "fresher".

69% of global respondents agree that foods without artificial ingredients are always more healthful.

“As Trust Among Consumers Waivers, Authenticity is Critical”

Michael Fertek, Forbes, Jan 2019

(Source: Global Data, 2018 and Nielsen, 2016)

(Picture by Mali maeder, Pexels)

Population

Opinions

Growth

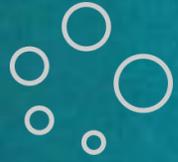


Ageing



Urbanisation





The global non-alcoholic beverage market is anticipated to grow at an estimated CAGR of 5.8% up to 2025, owing to factors such as rising disposable income, **population growth**, and changing lifestyle.

(Source: Grand View Research, 2017)

(Picture by H. Armstrong Roberts, Getty Images)



According to Mintel, **55%** of Polish and **49%** of Italian adults aged 55+ use **functional food** and drink to maintain a healthy heart.

Targeting this large demographic profile is not only positive for public health and wellbeing but can also be profitable. Elderly consumers have shown an interest in healthy eating and are open to purchasing innovative products that meet their needs.



Urbanisation



54% of the world's population now lives in cities. In 1950, only 30% of the world lived in urban areas; that figure is expected to reach **66% by 2050**.

A new class of tech-savvy, youthful, and cultured consumers is emerging from these varied urban environments.

**Functional Food and Beverages Market to Rise at 8.49% CAGR till 2026;
Increasing Health Awareness in Urban Areas to Fuel Market Expansion:**
Fortune Business Insights



Increasing
Wealth



Community &
Belonging

Health &
Wellness



Plant
Power

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Society





Many people today feel time-poor. Adults work longer hours and often face longer commutes than in years past.

Almost 6 in 10 adults globally are increasingly looking for ways to simplify their lives.

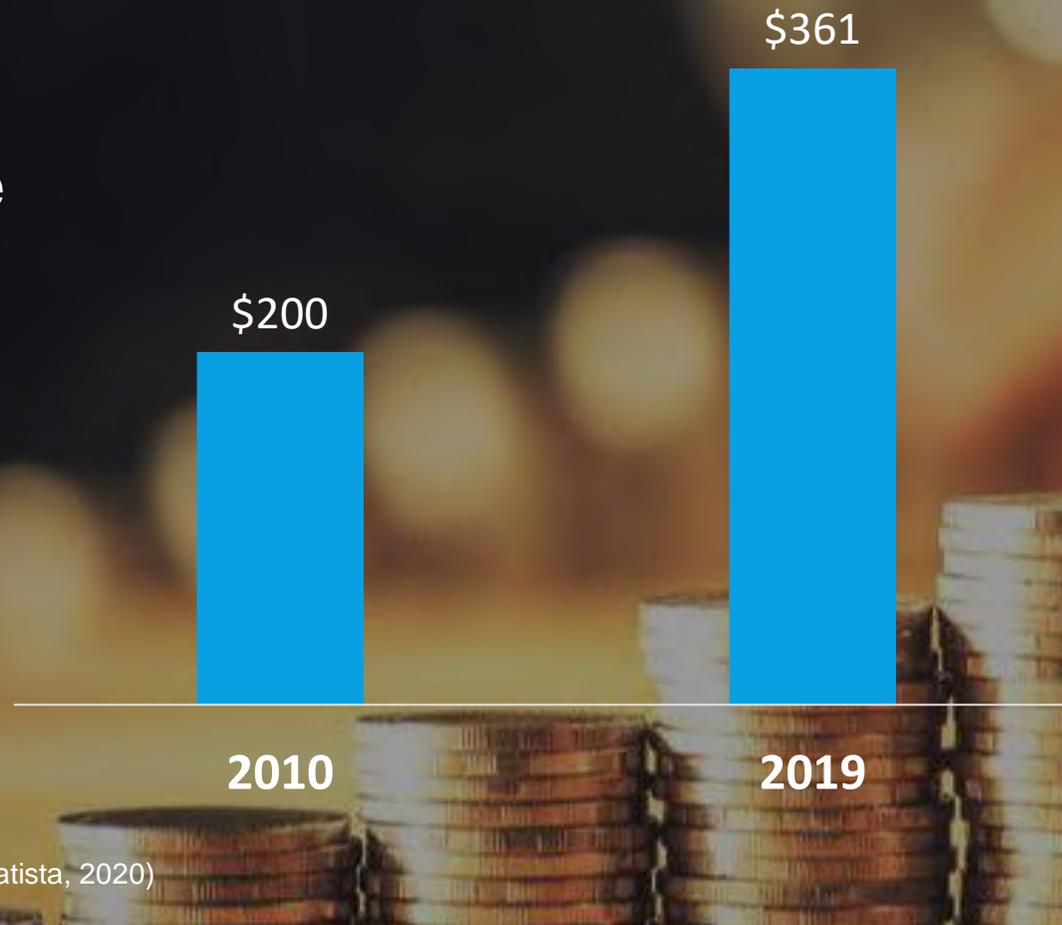
(source – Bord Bia consumer lifestyle trends, 2019 and Bord Bia: What Ireland Ate Last Night, 2020)

Increasing Wealth



A report in December 2019 from Credit Suisse shows that global wealth has increased from **\$200 trillion in 2010 to \$361 trillion in 2019.**

In Trillions of Dollars



As income rise, consumers tend to increase their spending on higher income elastic goods and services.

UK consumer spending on soft drinks is up, reaching ten billion pounds in 2018. In 2011 it had exceeded eight billion for the first time. However, the average consumption is declining. The average person drinks five litres less per year in 2017 as compared to 2012.

(Source: Credit Suisse 2020 and statista, 2020)

(Picture by Hugh Han, Unsplash)



6 in 10 (60%) of global respondents said the drinks they choose **reflect the type of person they are.**

According to Global Data, consumers are looking for more bespoke, individual experiences, with **61%** of global consumers expressing an interest in **creating their own products.**



Consumer health trends have shaken things up, moving demand away from sugar-filled carbonated products and towards alternative 'health drinks'.

71% of global respondents claim they go for the **healthier option** when choosing a non-alcoholic beverage.



Plant-based beverages market is projected to **grow at approximately 8.50% CAGR** during the assessment period (2018-2023)

So much so that the plant-based beverages market is estimated to reach a valuation of approx. **USD 388.42 BN** by the end of 2023.



Social Media



Connectivity

Technology



Due to busy lifestyles, 66% of UK adults would use blockchain for just some products, including tea (55%), coffee (56%) and bottled water (50%).

Shoppers desire traceability and transparency into their products. With information via the blockchain, consumers can make purchasing decisions on their beverage choices.



Social media has changed the way we eat and drink with consumers expecting every dish and beverage to be #Instaworthy (Kerry Foods)

45% of the total world population uses social media. That's **3.48bn people** – and 3.26bn of them use mobile devices to access social media.

(Source: Hootsuite Digital, 2019 and Initiative for Kerry Foodservice, 2019)

(Picture by Skylines, Shutterstock)



Using the Power of Social Media

Brand: Bubly Sparking Water (*from PepsiCo*)

Origin: US

Research company 'Black Swan' ingested 157m real-time beverage conversations from online data sources that identified key themes that led PepsiCo to create a new range of eight flavoured, zero-calorie, sweetener-free sparkling waters – was launched in the USA with a TV-ad during the 2018 Oscars.

(Source: PepsiCo)

Sum Up on Forces

The Forces that shape our World influence our priorities and shape our needs.

In the world today the forces of urbanisation, increased sophistication, connectivity and wealth there is a collective drive toward **“better for you” lifestyles.**

Consequently, for beverages there is a move to more functional beverages which is evidently the direction of travel for this sector; everything needs to think about its **“job to do”** in this context. New Hope Network’s (2020) State of the Industry report found that the U.S. market for functional food and beverages grew 5.3% to \$71.4 billion in 2019, **with MCT, melatonin, L-theanine, collagen, curcumin, prebiotics and hemp/CBD as the most sought-after ingredients.**

And also we see a strong influence of **sustainability and naturalness** on consumers’ lives.

For many these are now regarded as mandatory **“must haves”** or **“givens”** so they are more than trends. We will focus on the manifestations of these influences as we progress through the trends.

Better For You

Functionality

Sustainability

Naturalness

SECTION TWO

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Exploring Consumer Needs
Adult Beverage Needscape

Remember: *Taste is Paramount*

While specific needs will come to the fore, and **functionality and health are all pervasive**, consumers have limited willingness to compromise on great taste.

However, we found that their tolerance to do so increases somewhat as the focus on functionality becomes more significant.

“Consumers want a better-for-you product, but they will not compromise on taste”

Shan Joslin, VP of Commercial Development, Flavorhealth

The War on Sugar (and calories) Continues

“Sugar is the new tobacco” (Dr Simone Frey)

Sugar remains under pressure globally and remains the biggest challenge facing industry. With a consumer who is evidently unwilling to compromise on taste, but striving to avoid sugar the industry has to respond creatively.

There are now 45 countries around the world that have implemented a sugar tax including Ireland and the UK (Obesity Evidence Hub, 2020), so this will continue to further accelerate consumer’s desire to reduce sugar intake.

The anti-sugar sentiment is having a **considerable impact too on juice consumption.**

To complicate things questions around sweeteners are growing also with consumers variously questioning their safety amid growing social media debate.

For consumer this further fuels a desire for more NATURAL and FAMILIAR formulations.

**81% of
consumers in the
US are trying to
stop or reduce
sugar intake**

(Statista 2020)

The next big thing in the world of beverages will be...

(Consumer View)

“A tasty, nutritious
beverage, that's indulgent,
but low in carbs”

“Drink that boosts immune health”

“Drinks that improve your looks
(complexion, hair, weight)”

“More environmentally friendly packaging,
even fewer calories and no sugar.”

“energy drinks without sugar and caffeine”

“healthy drinks that do the same as an
energy drink”

“natural energy drinks with
health boosting
ingredients”

“A drink that contains a range of
vitamins and minerals”

“Completely recyclable drink
with 100% goodness that is
also affordable”

“Sugar free sparkling water with added
pure fruit juice”

“A reduction in the amount of
plastic that is used”

“something that's natural, inexpensive
and with very little packaging”

“Be organic and from sustainably obtained
ingredients”

“a complete switch to glass and reusable
containers”

“A positive carbon footprint in the
manufacturing process”

“a natural drink rich in vegetables and fruits”

“A drink with few ingredients and only
natural ingredients”

And can you please complete the following
statement in 10 words or less:

Beverage Needscaping Tool

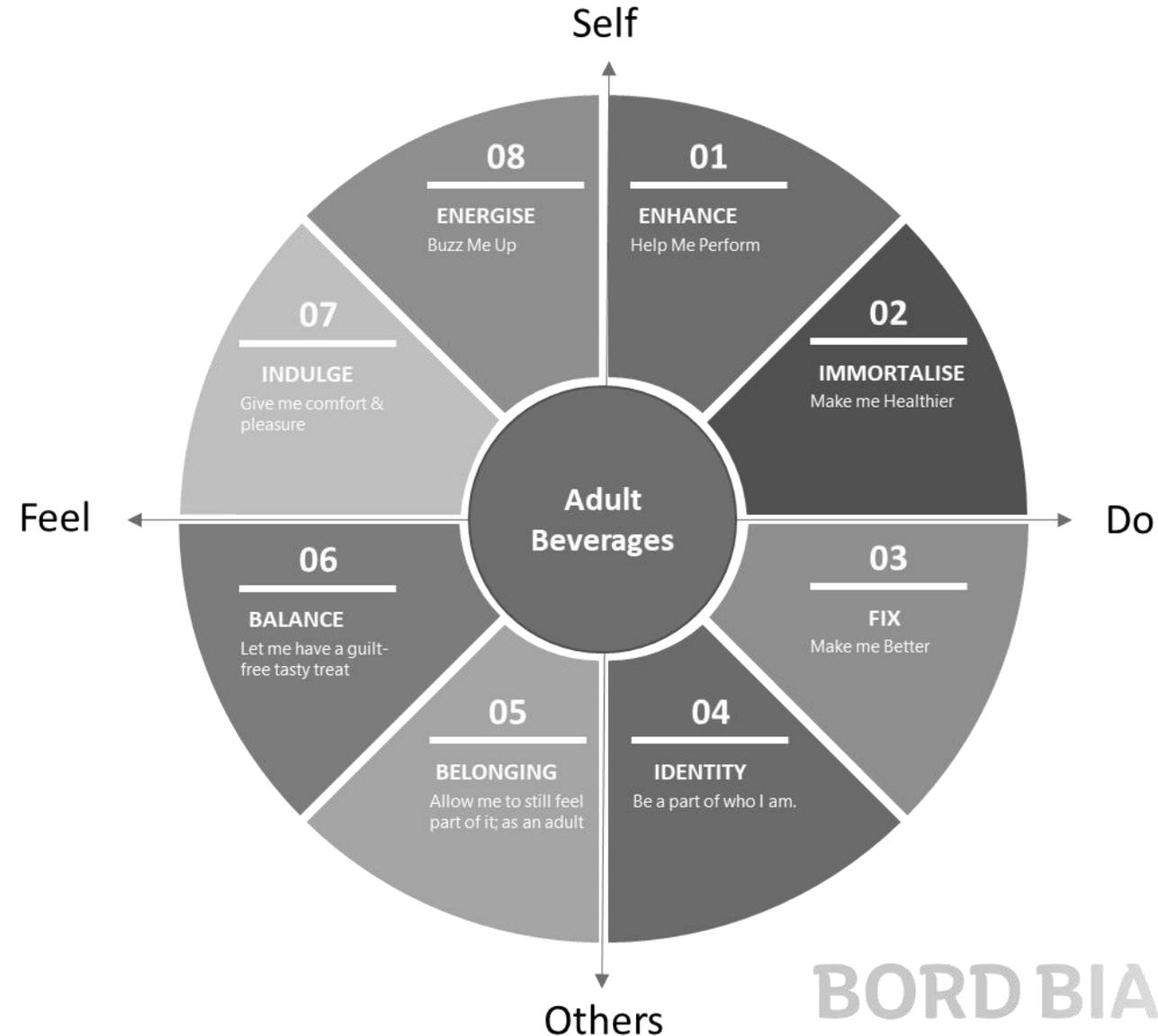
Our needscaping model is built on extensive qualitative consumer work, industry consultation and expert engagements.

Consumer needs are evidently shaped by two principle dimensions:

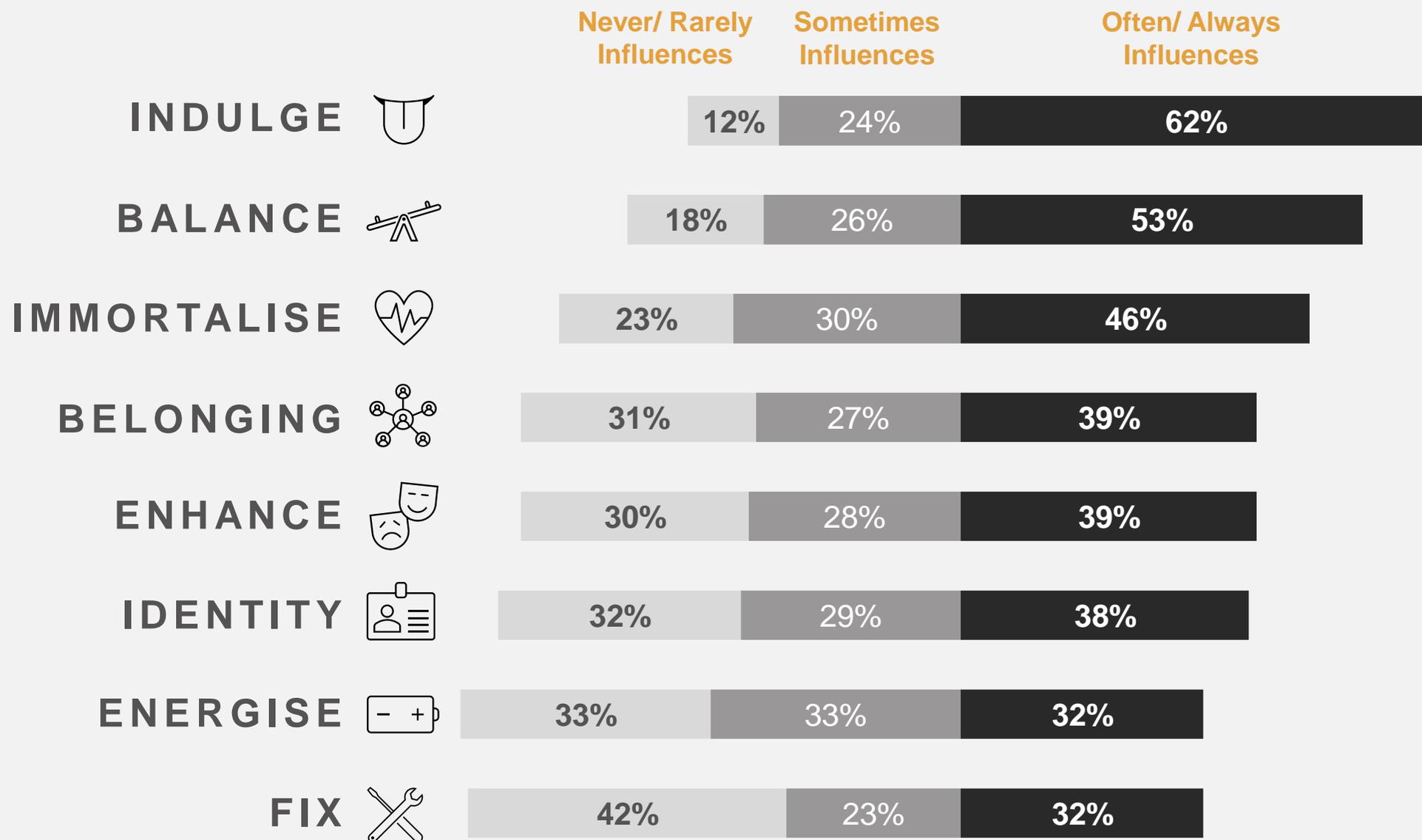
Self – Others; the extent to which the focus is on internal, personal needs or that they are influenced by others either directly or indirectly.

Feel – Do; the extent to which they are driven by a quest for functional gains or pure sensorial pleasure.

Through this lens we gain a deeper understanding of the motivations that influence consumer choice when it comes to adult non-alcoholic beverages.



Leading Influences on Global Beverage Choice



Q8, When it comes to choosing beverages in general, to what extent do each of the following influence your choice? (n=4,567)

Influence by Beverage Chosen Last Occasion

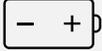
(Base: All Respondents, n=4,257)




INDULGE


BALANCE


IMMORTALISE


ENERGISE


IDENTITY


BELONG


ENHANCE


FIX

Q3 Thinking now about the last occasion on which you had a non-alcoholic beverage outside home or on the go which did you choose?

#1 Enhance: *Helping me Perform*

Giving me a sense of vitality that helps me to perform everyday. It's part of my regime to release my "super me".

It does more than keeping me hydrated, it gives me a little something extra.

It has become part of my routine. It is all about functionality and gives me what I feel my body needs to be at its best.

I often choose H₂O with added vitamins, electrolytes or antioxidant fruits that help to quench my thirst and to optimise the body or I choose sports drinks, but I'd love a more natural version.

39%
of beverage
consumers are
often
influenced by
this need

#1 Enhance: *Helping me Perform*

Brand: Super Charged

Origin: USA



Benefits: The product contains electrolytes and B vitamins to help your performance and to keep you hydrated.

Features: natural flavours, ginseng root extract, green tea, Vitamin B3, calcium.

[Source: Mintel GNPD](#)

Brand: trimino

Origin: USA



Benefits: Refresh, Rejuvenate and Hydrate. Protein infused water is made with whey protein isolate and includes essential amino acids required by the human body to perform effectively.

Features: 7g of protein, 28 calories per bottle, 0 sugar/ carbs/ fats/ gluten free, lactose free, 00% B3, B5, B6, B2

[Source: trimino](#)

#2 Immortalise: *Make me healthier*

It helps my longer-term health and builds my immune system to keep me active and ready for the next challenge.

It is good for me and supports my physical and mental wellbeing enhancing my natural defences. With these drinks I can hydrate and refresh on-the-go which benefits my body.

It helps to keep me in my best condition and maintain good health.

This most functional of needs is a growing influence and a choice factor for **almost half** of all beverage consumers

#2 Immortalise: *Make me healthier*

Brand: Purdey's Edge

Origin: UK



Benefits: It contains fruit juices, sparkling water and botanical extracts with all the vitamins that your body needs.

Features: Vitamin B, free from caffeine, artificial flavours and sweeteners.

[Source: Purdeys](#)

Brand: Organic Human

Origin: Denmark



Benefits: It's all about feeling better and stronger. In long term the main goal is to have a healthier lifestyle choosing something pure and good for you.

Features: No added sugars, no additives, organic fruit juices , pure ingredients.

[Source: Organic Human](#)

#3 Fix Me: *Make me better*

It is a cure for the mind and body.

Its medicinal properties resolve my ailments; temporary and long term.

It puts me in control and helps me to feel good again and get on with my life. It feels like a safer, more natural choice than reaching for medicines.

Proven benefits in a bottle.

The **most niche** influence of all, but an important driver for 1 in 3

#3 Fix Me: *Make me better*



Brand: Rakmai

Origin: Thailand

Benefits: This low calorie product contains chrysanthemum which promotes a healthy liver, lung and eyesight. It also helps to reduce the risk of heart disease, high blood pressure and obesity.

[Source: Mintel GNDP](#)



Brand: Trader Joe's

Origin: USA

Benefits: This product is a mix of coconut water, turmeric and lemons juices.

Features: USDA organic and kosher certified

[Source: Mintel GNDP](#)

#4 Identity: *Be a part of who I am*

The choices we make define who we are, and these reflect us and how we want others to see us.

These drinks reflect who I am and my priorities in my life; sporting, health, rebel, maverick.

The power of identity is strong; make sure your drinks represent your values.

Interestingly
Seltzers have
a strong connection
with this motivation

#4 Identity: *Be a part of who I am*

Brand: Revive Kombucha

Origin: USA



Benefits: This product is made with probiotics and sparkling water. Contains 5 billion live probiotics.

Features: 5g of sugar, 20 calories per can, natural fermentation, unique cultures. Organic, Non GMO.

[Source: Revive Kombucha](#)

Brand: Green Monkey CBD

Origin: UK



Benefits: Alternative to caffeine based drinks offering consumers relaxation and enjoyment.

Features: 50 calories per can, zero caffeine and 10 mg of CBD mixed with fruit flavours and carbonated water

[Source: Green Monkey CBD](#)

#5 Belonging : *Allow me to feel part of it*

It gives me a sense of connection with others, I can share and celebrate moments with others.

I care about my family and friends and want to spend quality time with them.

My choice allows me to be part of the group.

This “sober-curious” groundswell has driven a surge in innovative NPD in the non-alcoholic space.

Strongly connected to “**alcologs**”, but also iced teas and coffees....

Most influential in **FR** and **NL**

#5 Belonging : *Allow me to feel part of it*



Brand: Sparklingly Sober

Origin: Scotland

Benefits: A refreshing new choice of alcohol free drinks based on classic champagne cocktails

Features: alcohol free

[Source: Sparkling Sober](#)



Brand: Seedlip

Origin: UK

Benefits: This product is described as a high quality non-alcoholic option made with natural botanical extracts.

Features: alcohol free, sugar free and no artificial flavours.

[Source: Seedlip](#)

#6 Balance: *Let me enjoy a guilt free tasty treat.*

It gives me permissible pleasure and refreshment, without having to compromise.

I can feel good about my choices and indulge my taste buds, without feeling guilty or judged. This is a choice I am happy to make a part of my everyday life.

With more naturally sweetened and diet options to choose from there are a world of options out there.

The heartland of diet sodas; **the second most influential driver**..... Behind pure indulgence

#6 Balance: *Let me enjoy a guilt free tasty treat.*



Brand: Fuze Tea

Origin: USA

Benefits: This is a low calorie product made from fruit blend and tea extracts.

Features: Ingredients sourced from selected farms, antioxidants, tea extracts.

[Source: Fuze Tea](#)



Brand: Spindrift

Origin: USA

Benefits: Unique and delicious taste from real fruit flavour and sparkling water.

Features: High quality ingredients from family farms around the US

[Source: Spindrift](#)



Brand: Sprite

Origin: USA

Benefits: Free from calories, caffeine and sugar

Features: No additives/Preservatives, No calories, caffeine free, sugar free, Environmental friendly package.

[Source: Coca Cola](#)

#7 Indulge: Give me comfort and pleasure

It is pure pleasure that appeals to our hedonistic side. For those times when we want to forget about our diet.

It stimulates my senses and makes me want to try it. It is fun and makes me want to experiment.

It tastes great and it makes me feel free.

Our **top influence** on choice... key to over 6 in 10 consumers in all markets

#7 Indulge: Give me comfort and pleasure



Brand: Fanta

Origin: USA

Benefits: The classic recipe with strawberry flavour that brings joy to consumers.

[Source: Coca Cola](#)



Brand: Twist

Origin: South Africa

Benefits: The product contains 10.7g of sugars per 300 ml and is made with non-nutritive sweeteners.

[Source: Mintel GNPD](#)



Brand: Mountain Dew

Origin: Sri Lanka

Benefits: This products contains 12.30g of sugars per 100 ml.

[Source: Mintel GNPD](#)

#8 Energise: *Buzz me up*

It helps me get through the day and it has a sense of adventure. It wakes me up in the morning and allows me to keep up with my hectic days.

It gives me the kick I need to stay alert throughout the day.

I love that there are many new ways to get this energy kick especially with more natural options available all the time.

A frequent influence
for **1 in 3** adult
beverage consumers

#8 Energise: *Buzz me up*

Brand: Coca Cola Energy

Origin: USA



Benefits: Energy with Coca Cola taste. Caffeine from derived sources.

Features: Guarana extracts, B vitamins, free from taurine and sweeteners.

Brand: Monster Energy

Espresso
Origin: USA



Benefits: Three shots of espresso blended with European milk and enhanced with Monster's energy blend.

Features: 150 mg caffeine per can

Brand: Runa Natural

Energy
Origin: USA



Benefits: an all **natural** tea-based energy drink made from Amazonian Guayusa Tea. Original and Berry. They are carbonated and provide consumers with a **natural** alternative while providing twice the antioxidants of green tea.

Sum Up on Needs

These are the consumer needs we are hearing about; the jobs they want their beverages to do.

They **represent the direct input from consumers** we consulted in the UK and Ireland and are reflective of the broader consumer needs expressed in the wider beverage literature.

This in-depth understanding of needs can become an important tool in the development of innovation whether it is to drive **redevelopment, reinvention or repositioning.**

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Flavours, Formulations and Formats in Brief

(Irish) Forest & Forage

In the quest for authentic goodness and natural functionality there is a growing interest in wild ingredients that can be foraged around us.

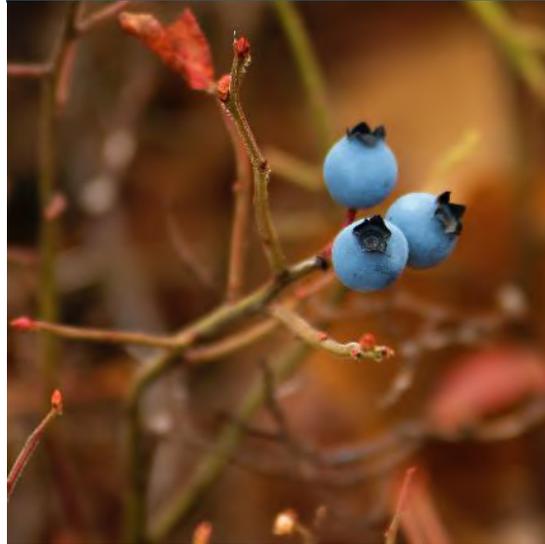
BOTANICALS



Irish botanicals can provide medicinal qualities and vitamins. White horehound, Plantain, Mullein....

Photo by Joshua J. Cotten on Unsplash
Photo by Jaël Vallée on Unsplash
Image by Valgerd Kossmann from Pixabay

FOREST FRUITS



Berries are big at the moment, wild berries are even more interesting.... Blackberries or Bilberries with their wonderful ancient history here.

ANCIENT REMEDIES



Find some ancient recipes and traditions. There are lots of Irish Druid herbal remedies for example.

LOCAL HEROES



Showcase their origin from "around here"... Elderflower from Wicklow, nettle from Donegal.

Processes

There are processes too that are gathering momentum due to their more premium edge..... Language is an ingredient too!

INFUSIONS



Extracting subtle flavours over time for a more refined taste experience....

COLD BREW



Popularised from the world of coffee, it is making its way into teas, kombuchas and other areas.

PRESSÉS



With juices squeezed from the fruit; this brings you a premium taste experience.

SELTZER



The language of refreshing sophistication with a delicate flavour.

Ingredients: *Some things we are hearing about*

“Herbs and Spices are Taking Off”

Aveen Bannon, Dietician



Some Noteworthy Format Trends

While there are consumers who will always “go large” the future trend is towards **smaller formats**.

“PET the time is nigh, 250ml can the time is now” *Alex Bennett*
More eco friendly and considered a more “delicate” option.

Shots (DE, UK, IRL, US) are growing with strong associations around **medicinal needs** and in keeping with busy lives.

There is also a desire among breakthrough brands to create **proprietary iconic formats** and others play around with textured packaging to create a premium and distinctive edge.



SECTION THREE

Opinions
clarity and confidence

Leading Beverage Trends

With Supporting Expressions

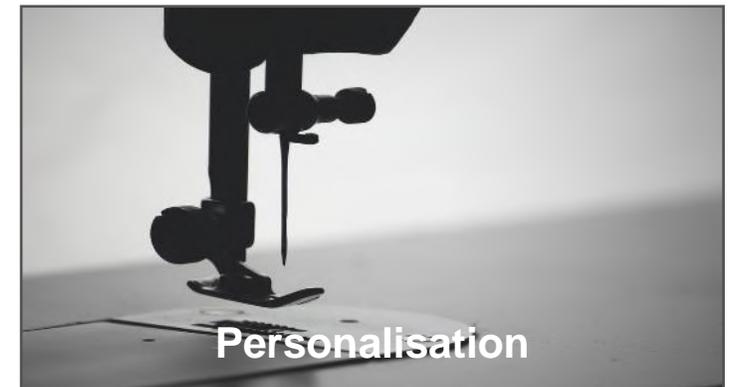
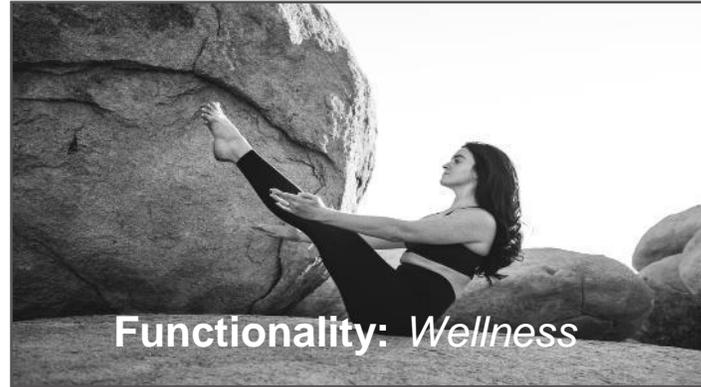
Introduction to Trends

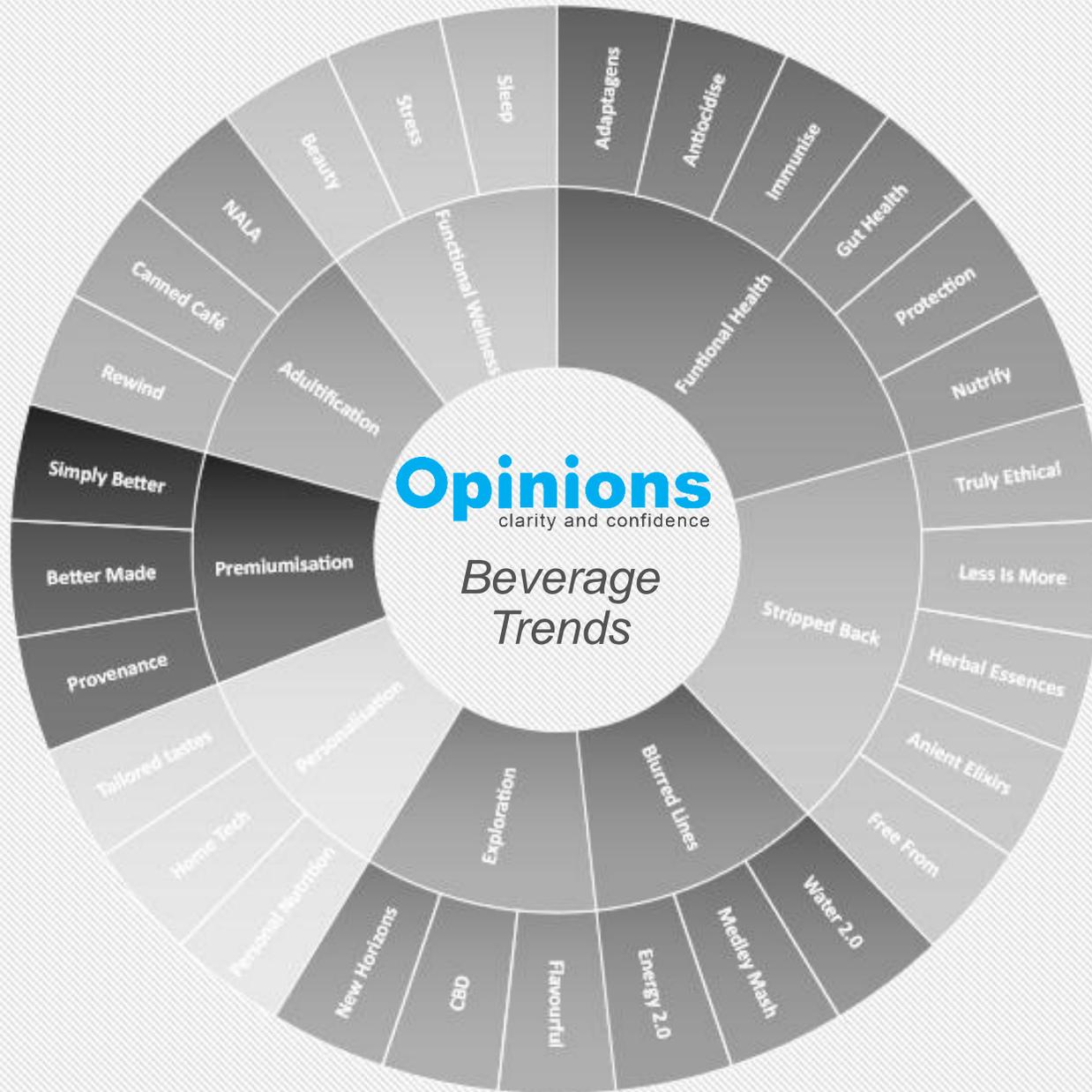
These trends represent directions of travel for the beverage sector **over the next 5 years** as it continues to evolve.

While the relevance of each will be dependent on your sector and circumstances, they are designed to provoke thinking and to seek out ways in which your proposition can be as relevant as possible into the future.

These trends are all at varying degrees of development and have different levels of mass market interest, but all are equally interesting to explore.

The Trends At a Glance





- Functional Health
- Functional Wellness
- Adulthood
- Premiumisation
- Personalisation
- Stripped Back
- Exploration
- Blurred Lines

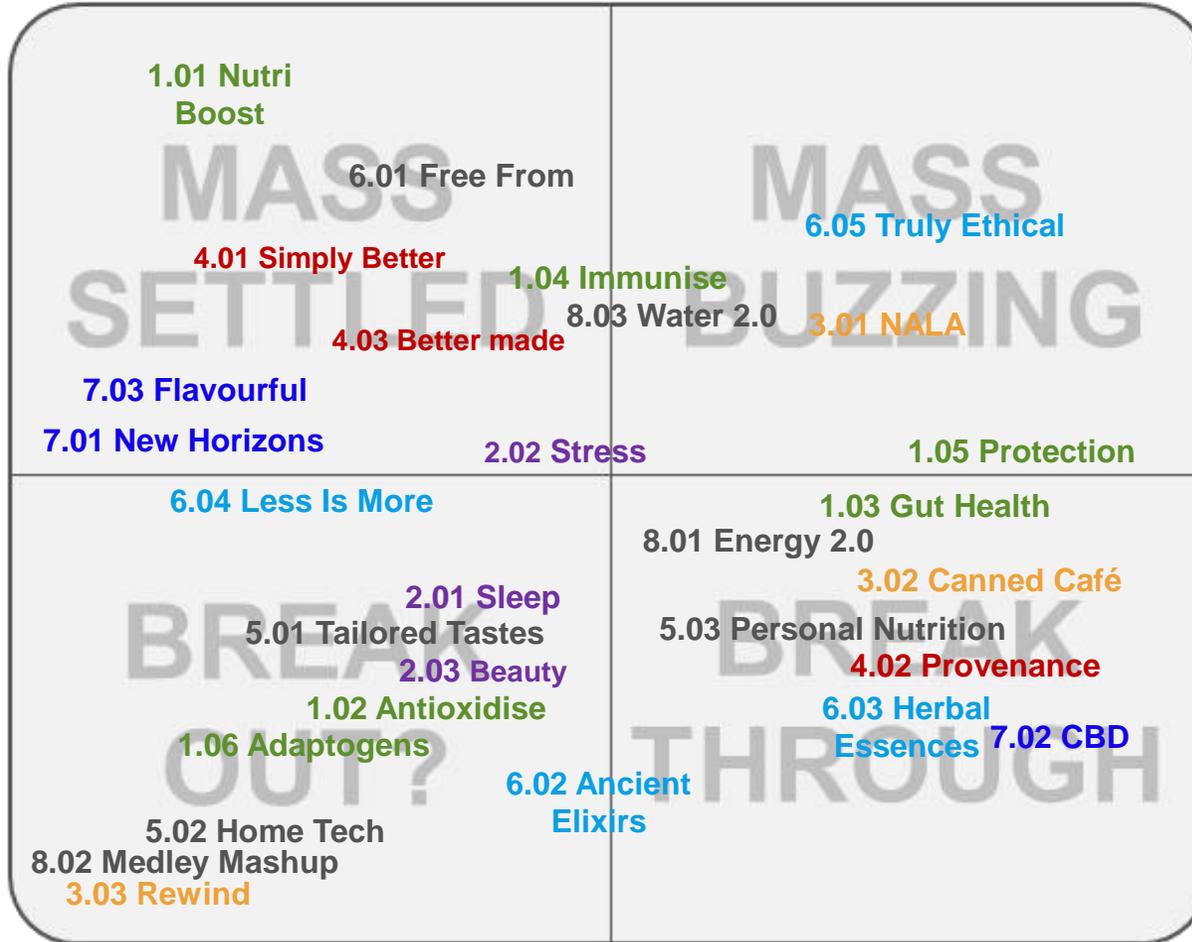
This is an overview of the emerging trends identified, with **trends** appearing on the inner circle and **expressions** of these trends on the outer circle.

TRENDS & EXPRESSIONS

Mapping



These Expressions have mass market interest but they are relatively settled in terms of current “buzz” in the market as they are more established trends



These are resonating with the masses and are buzzing right now. Well established trends that may be peaking in terms of opportunity.

Expressions here are of relatively niche interest overall, but as trending phenomena have the potential to break out

These are exciting expressions that are buzzing at the moment and are resonating strongly with a niche within the market; clear potential here to break through to the masses.



Trends>

FUNCTIONAL HEALTH

FUNCTIONAL WELLNESS

ADULTIFICATION

PREMIUMISATION

PERSONALISATION

STRIPPED BACK

EXPLORATION

BLURRED LINES

Opinions
clarity and confidence

Trend Exploration



Reading the Slides

There are three key slides supporting each of the trends as follows:

1

These icons refer to the earlier FORCES in terms of their influence on this trend

These scales show the extent to which this expression is "buzzing" and the scale of "relevance"; niche to mass

Some simple thought starters to get you thinking

2

Some interesting features and ingredients for this product

Sources if you want to find out more about these products

3

A summary to show the mapping of expressions in terms of "Buzz" and market "relevance"

Using our needsmapping model to show the key needs addressed by this trend

Some indications of the main beverage categories impacted

1 Functionality: Health

Functionality is the biggest driving force for change in the beverage sector as consumers demand more, seek to offset any negative effects and producers strive to maximise value. This is a selection of the trending functional benefits.

Key Forces:



1.01 Nutrified

Over half (52%) of consumers in Singapore say they check the ingredients list and nutritional information on packaging before purchasing beverages.

(Nielsen, 2020)

Many categories of beverage are frequently infused with nutritional boosters. And the University of Warsaw found that 15.9% of the vitamin C, 9% of vitamin B6 and folates in Poland come from non-alcoholic beverages.

BUZZ



Think About.....

How you can add nutritional claims to your products.... Omega 3, Protein, Fibre, Vitamins, Magnesium and Minerals

1.02 Protection

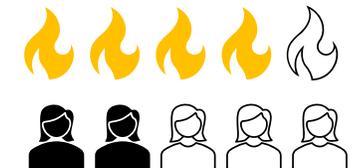
Protective qualities in food and drink are being increasingly used to defend against the perils of modern life from anti-inflammatories to protections from colds and flus through to the use of collagen and Vitamin A to protect use from the eye damage caused by screens.



The use of protective ingredients berries, Vitamin A, Vitamin E, Holy Basil, Medicinal mushrooms, Carotenoid, Algae, Lutein, Prebiotics, Green Tea

1.03 Gut Health

The home of kombucha and kefir; these are trending and we see a strong response to our “gut future”. (more later) 57% consumers want to use beverages as a vehicle for digestive health benefits, *(Globaldata)* With growing evidence of the gut-brain connection and more palatable and accessible options coming on-stream this is expected to grow significantly.



RELEVANCE

Is there a pre or probiotic dimension you could consider?
Apple Cider Vinegar, Probiotics, Kombucha, Kefir

Trend

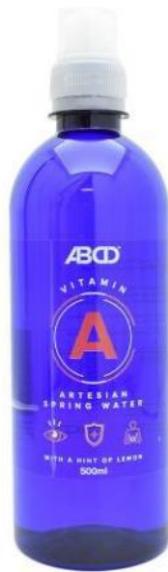
1 Functionality: *Health*

Expressions

Opinions
clarity and confidence

1.01 Nutrified

ABCD Vitamin Water



New Zealand

This is a functional product that contains zero sugar, zero salt and vitamin A which is said that helps eye health, skin and to support the immune system.

[Source: Parkers Beverage Company](#)

1.02 Protection

GET more ViTS



UK

The product contains vitamin D to help the levels of calcium in your body. Vitamin D is good for teeth, bones and muscles.

[Source: GETmoreViTS](#)

1.03 Gut Health

KOE



USA

The product is made with real fruit juices and purees, not artificial ingredients and billions of live probiotics per can that fortify the digestive system.

[Source: KOE](#)

Key Forces:



Photo by Darran Shen on Unsplash

1 Functionality: Health

Functionality is the biggest driving force for change in the beverage sector as consumers demand more, seek to offset any negative effects and producers strive to maximise value. This is a selection of the trending functional benefits.

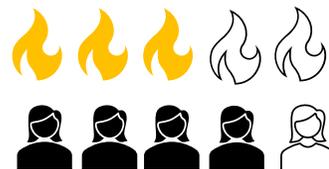
Key Forces:



1.04 Immunise

According to a recent study from Mintel, immunity interest will remain among consumers. Vitamin C and digestive health formulations will have a persistent appeal, especially as COVID-19 and new severe viral strains threaten society. (Mintel, April 2020)

BUZZ



Think About.....

Immunity is trending; can you make the most of it? Vegetables, Citrus, Elderberry, Turmeric, Ginger, Garlic, Almonds, Hibiscus, Aloe

1.05 Antioxidise

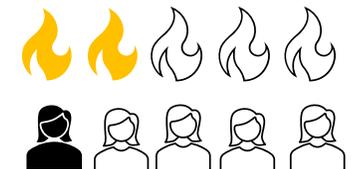
The global antioxidant beverages market size will reach USD 300 billion by 2022, (Technavio, 2018) as consumers seek protection from free radicals in the food and drink they consume (Bord Bia Covid Indicators, 2020)... antioxidant-rich fruits and vegetable-based beverages, green tea, and other antioxidant beverages feature in this trend.



Antioxidants aren't new, but for your beverages it may be a new departure. Green Tea, Berries, Carotenoids, Vitamin C, Zinc, Juices, Smoothies, Water

1.06 Adaptogens

An emerging class of beverages, typically derived from herbs that help the body adapt to alleviate problems from heart health and stress to inflammation and energy. Often found in teas and infusions, they include centuries-old ingredients like as maca, holy basil, Arctic root, Aloe Vera and Siberian Ginseng.



RELEVANCE

As natural super nutrients that cover a range of bases, are these herbal additives something for you to think about (see also trend 6.03)

Trend

1 Functionality: *Health*

Key Forces:



Photo by Darran Shen on Unsplash

Expressions

Opinions

clarity and confidence

1.04 Immunity

Vive Organic



USA

Vive Organic is a functional shot made with cold pressed ginger root, turmeric root, elderberry, black pepper, pineapple and lemon that help to boost the immune system.

[Source: Mintel GNPD](#)

1.05 Antioxidise

ALO



USA

This product contains pomegranate and cranberry juices rich in antioxidants. The product is free from artificial flavours, preservatives or colours.

[Source: ALO](#)

1.06 Adaptogens

Taika



Finland

Taika, which means “magic” in Finnish, is a sugar-free, keto-friendly macadamia latte that contains the [adaptogen](#) blend of Cordyceps, Lion’s Mane, Reishi, Ashwagandha, and L-theanine designed to balance out the effects of caffeine.

[Source: Sprudge](#)

Consumer Created Innovation

Pains Addressed

Non Ethical
Feel Guilty
Unhealthy Drinks
Misleading health claims

Gains Created

100% Natural
Good For You
Honest
Nutritional
Ethical

Name It: Injuicive **Theme:** "Better For You"

Why this? It's all inclusive, honest, natural, sensible and straightforward.

What is it? It's made of fruit juice that is sustainable and comes from Fairtrade. They have a low carbon footprint and natural and herbal health benefits. They have no allergens.

What makes it great? This type of drink is relevant to me, it's has a sleek design and is versatile. It can be used all the time and it's for young adults. You could buy this drink express/couriers, in bars and clubs. The pack is smooth, sleek like a craft beer can.

Snappy Tagline Established for everyone!

When it will be used?

Anytime

Who will drink it?

Young adults

Where to buy it?

Bars & clubs

Type of Pack?

Smooth, sleek craft beer can



This is a natural and straightforward fruit juice that has a low carbon fruit print. The sleek design and allergen-free product attracts young adults.

Consumer Created Innovation

Pains Addressed

Unhealthy ingredients
Not getting enough vitamins
Use of plastic

Gains Created

Daily vitamins
Boosts immune system
Helps your appearance
Boosts confidence

Name It: **Vitamine** *Theme:* "Fix Me"

Why this? This is a prevent, cure type of drink that can be used in daily shots.

What is it? It's composed with vitamins and supplements. It's an immune system boost. It also includes water infused shots that re considered natural remedies. It's a drink that will be use one per day and is destinated to adults. You can purchase this product from commercial shops and health shops.

What makes it great? It has internal and external benefits such as helps with hair and skin (beauty). The packaging is a big bottle with a shot measure glass for minimal use of packaging. This type of drink is customizable and can be adapted to different versions base on the desire of the consumer.

Snappy Tagline Feed your health!



When it will be used? Once a day

Who will drink it? Adults

Where to buy it? E-comm Health Shops

Type of Pack? Big, refillable bottle

Vita-mine is a natural remedy drink composed with vitamins and supplements that boosts immune system and is used in daily shots. The way that consumers are consuming vitamins and supplements today is changing. People are searching for a more holistic approach when it comes to their health.

Consumer Created Innovation

Pains Addressed

Unhealthy drinks
Unsustainable packaging
Feel Guilty

Gains Created

Probiotics
Boost immune system
Small bottle
Natural ingredients

Name It:

Roots

Theme:

"Plant Power"

Why this?

This is a plant based shot that releases energy and has probiotics.

What is it?

It comes in bottles of one litre and it's designed to revitalize and boost our immune system.

What makes it great?

It contains natural ingredients, high in calcium, supplements and easy to digest. The bottle includes a shot glass.

Snappy Tagline

This type of drink will use in the mornings and is for everyone!

When it will be used?

Mornings

Who will drink it?

Everyone

Where to buy it?

Health Food Shops

Type of Pack?

One litre bottle with a shot glass



CONSUMER CREATIONS
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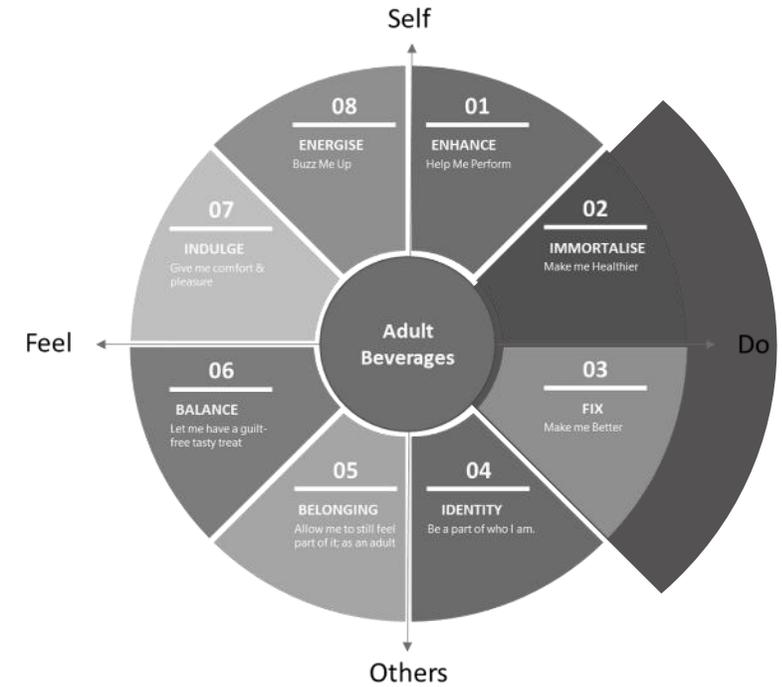
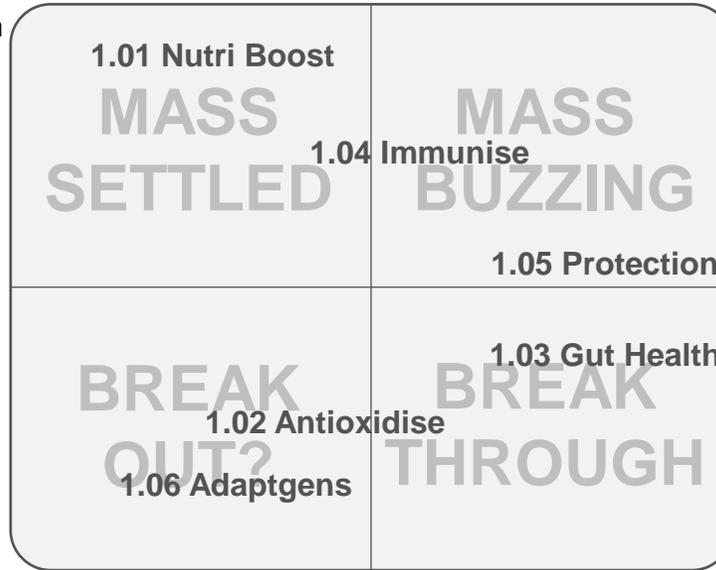
This type of beverage responds to the need of a daily boost to your immune system using plant based ingredients. We can also see an interest for a more environmental friendly packaging.

Trend

Opportunity

1 Functionality: Health

These trends sit firmly in the “functional” needs area of our need scaping tool and their high consumer relevance pulls them to the top of our map with gut, protection and immunity hot spots for the future.



KEY CATEGORIES:

Enhanced Water, Juice 2.0, Kombucha, Kefir, Seltzers, Smoothies, Pressés & Speciality, Some premium natural energy (see energy 2.0)

Capture your thoughts here.....

Key Forces:



Consumer Created Innovation

Pains Addressed

Lack of functionality

Gains Created

Boost immune system
Hangover cure
Small package

Name It:

Potion

Theme:

"Fix Me"

Why this?

This is an alternative natural supplement.

What is it?

It comes in a format of 100-150 ml range of immune boosting, iron rich that has relaxing and hangover curative properties.

What makes it great?

This is a natural medicine bringing back to basics. Premium look and feel and taste. You will buy this product because its expensive and you can send as a present in a funny box. The packaging is like medicine glass bottles. You will use this product when you are not feeling great or when you want to feel healthy. It's created for young professional consumers and you can buy it in up markets and supermarkets.

Snappy Tagline

It's not Magic!

When it will be used?

When not feeling great or when you want to feel healthy

Who will drink it?

Young professionals

Where to buy it?

Up market and supermarkets

Type of Pack?

Glass medicine bottle



CONSUMER CREATIONS
Visualised by graphic artist
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The need for a quick fix after a night out or a potion that will make us younger, healthier and prettier are the reasons why this idea was created. A natural supplement that boosts your immune system using super ingredients (botanical, charcoal, collagen).

2 Functionality: Wellness

Consumers are becoming more and more interested in naturally-functional food and drinks to improve wellness.

This rise in health consciousness, partnered with hectic on-the-go lifestyles, has prompted innovation around smart, nutrient-rich beverage solutions to improve sleep, stress and beauty.

Key Forces:

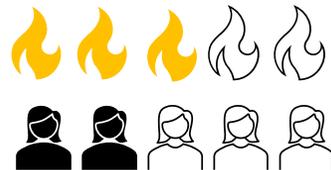


Photo by Wesley Tingey on Unsplash

2.01 Sleep

44% of adults surveyed globally admit their sleep has worsened in the last five years. *(Philips, 2019)*
Sleep inducement beverages are being touted as the saviour with proven relaxants added to natural bases. May be suited to dairy innovations.

BUZZ

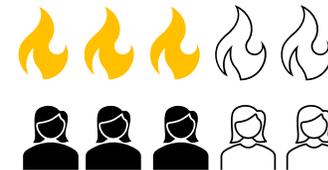


Think About.....

Is there a role for sleep inducing ingredients?
Chamomile, Magnesium
Peppermint, Tryptophan,
Melatonin and Valerian root

2.02 Stress

75% of US adults reported experiencing moderate to high levels of stress in the past month and nearly half reported that their stress has increased in the past year.
(American Psychological Association, 2019)
It is unsurprising that we are seeing these elixirs on the rise.



CBD-infused, Ashwagandha beverages are believed to help relieve stress and anxiety. Is this zone for us?

2.03 Beauty

87% and 86% Asia-Pacific consumers claimed that incorporation of vitamin C and E, in their beauty and grooming products make them somewhat/very appealing. 72% said incorporation of collagen in their beauty products makes it somewhat/very appealing.
(Global Data, 2019)



RELEVANCE

With a wide array of proven youth-promoting additives there may be opportunities here?
Collagen peptides, Retinol, Vitamin C, Vitamin A, Lysine, Silica 82

2 Functionality: *Wellness*



Key Forces:



Photo by Wesley Tingey on Unsplash

.01 Sleep

So Good So You



USA

This cold pressed juice is made with honeydew juice, lemon juice, pineapple juice, California poppy extract, lavender extract, butterfly pea flower powder and probiotics to improve sleep quality.

[Source: So good so you](#)

.02 Stress

Pfanner



SLOVAKIA

This product is made with pressed apples, cherries, blackcurrants, elderberries, raspberries, hemp, cinnamon extract and magnesium used to preserve the health of the nervous system.

[Source: PFANNER](#)

.03 Beauty

Diva's



UK

Diva's vitamin water is a non-carbonated and non-alcoholic drink made with natural blueberries and acai berry flavour, Vitamin C, B3,B5,B6,B9,B12, Niacin and Coenzyme Q10 that helps to produce collagen and elastin.

[Source: Diva's](#)

2 Functionality: Wellness

The wellness connection with beverages is a new area, but one we think will gain traction. Stress is the easy-access option in this functional zone.

Key Forces:



Photo by Wesley Tingey on Unsplash



KEY CATEGORIES:

Natural extracts of fruit & vegetables, Enhanced Waters, Wellness shots, CBD-infusions, Vitamins

Capture your thoughts here.....

Consumer Created Innovation

Pains Addressed

Sugar
Bad packaging
Non-ethical

Gains Created

Feel good
Gut health
Relaxing
Restore body

Name It:

Calmboucha

Theme:

"Holistic wellbeing body and mind"

Why this?

This is a delicious option that feeds the mind, body and soul.

What is it?

It's a refreshing blend of natural ingredients in still or sparkling and can be served hot or cold.

What makes it great?

It's made with natural, no hidden sugars, sustainable packaging designed by an eco-friendly company with unique calming properties.

Snappy Tagline

Escape the madness, restore the body!

When it will be used?

Post drinking day-
Relaxing, wind-down
drink

Who will drink it?

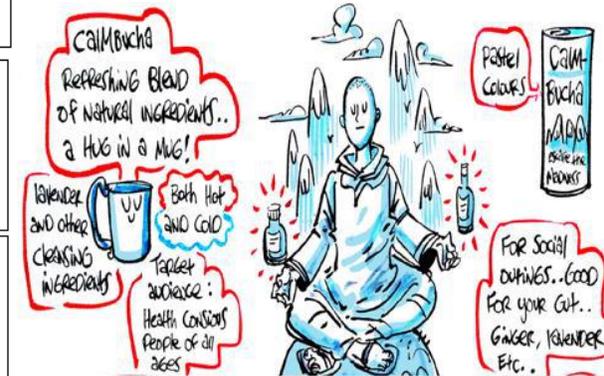
Health
conscious
people

Where to buy it?

Premium stores
(Avoca, Fallon &
Byrne)

Type of Pack?

Matte can-330ml
Glass bottle-500ml



CONSUMER CREATIONS
Visualised by graphic artist
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A drink with relaxing properties that is beneficial not only for your body but also for your soul. This type of drink is created from the need of real healthy beverages that are 100% natural and have functional/nutritional benefits related to their ingredients (probiotics, cultures, etc)

Functionality Case: The Naked Collective

Putting functionality to the fore with a line of non-alcoholic beverages that call out their function quite clearly.

They play in a number of trend spaces containing just water, plants and vitamins, they are also low in sugar and additive free. And they do a “non-alc tipples” range too.

And there’s more: to deliver on their Carbon Neutral Commitment, they produce in Ireland for Ireland and in the UK for the UK.

See www.thenakedcollective.com



3 Adultification

Bringing Adult sensibilities to the beverage space brings us in some interesting directions and bringing the adult worlds of pubs and cafes to the beverage fixture is becoming more prevalent. It also opens the possibility for a throwback to the past to appeal to the nostalgic in people.

Key Forces:

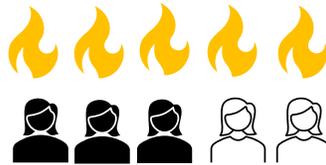


Photo by Park Street on Unsplash

.01 NALA

25% The percentage of UK consumers cutting back on alcohol (*Stylus*) and global alcohol consumption is down by 1.5% in 2020 (*IWSR*). This is tapping into a wider theme of busy lives and a heightened emphasis on staying “straight” to perform without missing out.

BUZZ



Think About.....

Alcolog versions of familiar favourites including beer, wine and spirits, but also accompaniments and mixers for that true “night out” experience

.02 Canned Café

RTD coffee continues to drive the category as the fastest growing segment, growing 31% in the last two years. (*Mintel*) Now 1 in 5 coffee launches are cold. This is a playground for the coffee companies, with 20% annual growth expected for the next 5 years led by the US, China and Japan.



Capturing the magic of the café in a bottle or can; coffee and tea, in all their forms and “blurred line” mixes have a role (later)

.03 Rewind

Nostalgia, retro and vintage packaging is becoming popular. “Vintage-inspired packaging is being used to convey the impression of age and prestige”. (*Eastpac, 2019*) This is aimed at restoking interest with an older audience and asserting brand heritage.



RELEVANCE

The reintroduction of glass bottles, old flavours, old-fashioned fonts and colour schemes

3 Adultification



Key Forces:



Photo by Park Street on Unsplash

.01 NALA

Bar None



USA

Non-alcoholic crafted drinks created from bar recipes to offer an alternative to non-alcoholic drinkers that are in the mood of being out together.

[Source: Bar None](#)

Daylesfort



France

Looks just like champagne, but it is Apple and Bilberry Juice from organic orchards in Nantes in North West France.

[Source: Daylesfort](#)

Ritual



USA

Can be swapped out 1:1 for whiskey or gin to make cocktails or enjoy with a coke or tonic...

[Source: Ritual](#)

Curious Elixirs



USA

Shaken not Slurred! A pre-mix cocktail without the alcohol. Handmade with the finest ingredients. . . 88

[Source: Curious Elixirs](#)

3 Adultification



Key Forces:



Photo by Park Street on Unsplash

.02 Canned Café

Byron Beverage



Australia

Organic Cold Brew Coffee infused with Nitrogen. The product is described as a smooth and creamy texture with chocolate and berries flavour. Made with organic coffee beans and sugar free.

[Source: Byron Beverages](#)

.03 Rewind

Pepsi



India

PepsiCo India used a retro design as part of a limited edition campaign.

[Source: Mintel GNPD](#)

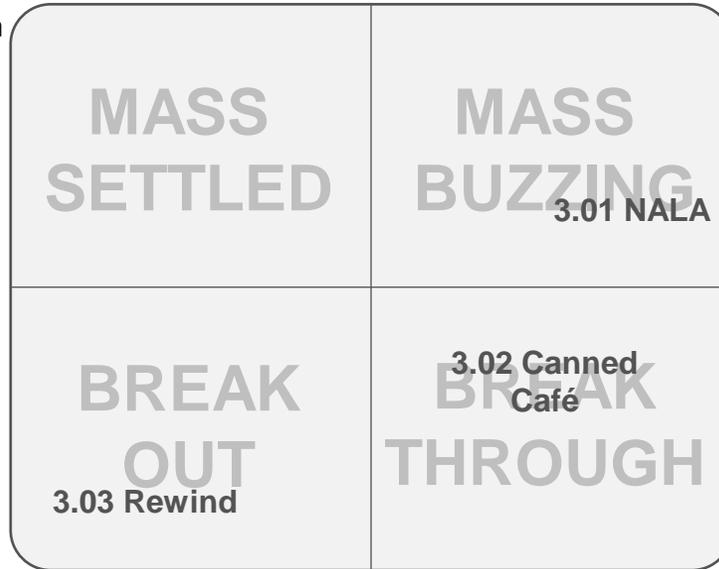
3 Adultification

This space is about identity and belonging with choices appropriate to their adult world. With a focus on inclusion and sociability they offer a adult option to suit the mood.

Key Forces:



Photo by Park Street on Unsplash



KEY CATEGORIES:

Any alcohol type, Sodas, Sparking water, Cold Brew Tea and Coffees; these trends are also amenable to blurred collaborations with other categories.

Capture your thoughts here.....

Consumer Created Innovation

Pains Addressed

No variety
Image

Gains Created

Alternative for non drinkers
Appropriate for social setting
Natural ingredients

Name It:

Guiltless

Theme:

"Crafty Local Heroes"

Why this?

It's an alternative to sparkling water and soft drinks. It's created to give more alternative to people that don't feel like drinking alcohol.

What is it?

A naturally brewed alcoholic alternative that satisfies cravings. It's guilt free to reward designated drivers. It has a great taste and it's natural.

What makes it great?

This type of drink will be use in social scenes such as pubs, watching a movie in Stella and its dedicated to people that are looking to reduce alcohol intake. You can buy this product in pubs, bars, events, cinemas.

Snappy Tagline

Reward your taste buds in a natural way!

When it will be used?

Social scenes

Who will drink it?

People who are reducing alcohol intake

Where to buy it?

Non-acholic pubs, events, cinemas

Type of Pack?

Can
Bottles



CONSUMER CREATIONS
Visualised by graphic artist
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The idea originated from the need to have more non-alcoholic alternatives available in the market. Some of the participants in the group noted there is moments that they don't feel like having an alcoholic drink but they still want to have a night out with their friends. A natural drink that you can enjoy on nights out, cinemas, pubs and events!

4 Premiumisation

Adults love the joy of beverages, but they want something a little bit special sometimes. This trend towards indulgent adult treats take beverages in a number of exciting directions from ingredient twists to ethical turns, there are lots of adult only beverage fun.

Key Forces:

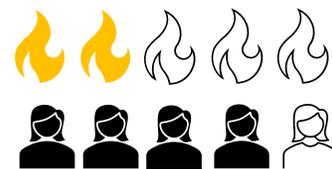


Photo by Lucas Favre on Unsplash

4.01 Simply Better

Adults want the joy of a soda that's a cut above. Better sourced ingredients and an upmarket sensibility, while still doing its refreshment duties. San Pellegrino has seen double digit growth for several years, with better ingredient focus: Clementina, Aranciata, Limonata.... What's not to like....

BUZZ



Think About.....

Passionfruit, Dragon Fruit, Turmeric, Moringa, Blook Orange, Pomegranate and a visual makeover for a premium edge.

4.02 Provenance

42% of global consumers favour smaller and locally produced brands over bigger, mass market brands. 70% of global consumers associate local or locally produced products with "fresher". (GlobalData, 2018) Think about hyper local ingredients or heritage to give a sense of place and tradition.



Country of origin, region of origin or sourced from a famous source; Valencia oranges, Sicilian lemon... Elderflower from Connemara....

4.03 Better Made

Consumers want products that contain clean and simple ingredients that they recognise. 39% of U.S consumers say they would switch from their current brand to one that provides clearer, more accurate product information on how it is made. (Nielsen, 2017) This is all about leveraging the value of a better production method.



RELEVANCE

Pressés, Infusions, Cold Brew and Seltzer.... This is the alluring language used referring towards better production methods.

4 Premiumisation

.01 Simply Better

.02 Provenance

.03 Better Made

Nix and Kix

San Pellegrino

Press



UK

Italy

UK

With Adult flavours and a more mature sensibility, Nix and Kix does mainstream “better made” well. Watermelon and Hibiscus, Blood Orange and Turmeric, with a subtle kick of cayenne. Yum.

This sparkling limonata is made with 100% Sicilian organic lemons, cane sugar and natural lemon flavour.

100% plant-based quality nutrition to help customers to live happier and balanced lives. Cold pressed natural fruit juice.

[Source: Nix and Kix](#)

[Source: Mintel GNPD](#)

[Source: Press](#)

Key Forces:



4 Premiumisation

For adult drinkers this is a reflection of themselves and their identity allowing them to indulge in pleasurable non-alcoholic beverages that suit their needs and match with their status.

Key Forces:



Photo by Lucas Favre on Unsplash



KEY CATEGORIES:

Water, Juices, Premium Soft Drinks and Seltzers

Capture your thoughts here.....

Opinions
clarity and confidence

Hot Topic
Sustainability & Plastics



Beverages are at the coalface of the consumer drive for sustainability; driven principally by the reliance on plastics, but also increasingly responsible sourcing of natural ingredients. **6 in 10 consumers across Ireland and the US are concerned by the impact of their beverage choices on the environment.**

However, there is widespread acknowledgment that the **industry has been doing a good job** in improving the sustainability of the beverages they produce, with 71% believing that to be the case.

In discussion with UK and Ireland consumers, while this is a concern and they respect brands who contribute positively, it does not have a significant bearing on choice for the mainstream consumer. It is generally perceived to be **an issue for the industry and governments to resolve.**

The role of government policy in shaping behaviour is considered by both the industry in Ireland and consumers to be the most effective way to tackle this issue.

In Ireland we recycle 70% of plastic bottles (Repak, 2020), one of the highest in Europe.

With annual consumption estimated at 1 trillion bottles a year, it is an issue that will continue to take attention of policy-makers, industry and consumers alike.

A combination of Measures.....

Reverse Vending

“Reverse vending” has been trialled here in Ireland and is commonly used in other markets such as Germany, China and Canada. The system issues vouchers for each bottle deposited in the machine that can be used in local stores.



Pic: Extra.ie

VEPR

Voluntary End Producer Responsibility schemes, whereby producing come together to take responsibility for recovery and recycling have had a huge effect in Africa. This is funded by a levy on PET resin and grants.

In South Africa recycling of PET bottles has gone from 14% to 65% compared with 60% in the EU and 28% in the US (TCCC).



Pic: REUTERS/Siphiwe Sibeko

Deposit & Return

Ireland’s waste reduction bill proposes a “Deposit and Return Scheme” for plastic bottles. While there is some debate about the efficacy of such schemes, and ultimately the consumer and retailer will pay, it has been proven in the US. With the US overall recycling rate for beverage bottles at 33%, in states with deposit laws it is 70% and it has halved little rates from bottles (Bottlebill.org).

SCOTLAND'S DEPOSIT RETURN SCHEME



In May 2019, Scotland announced that it would be implementing a similar scheme with a 20p deposit return on bottles; the first part of the UK to do so (Packaging News).

rPET; a solution to single-use plastics?

rPET or recycled PET is the current lead solution for industry. However, Europe is facing a shortage of supply (*Plastics Today*), which is hindering its potential. This is being caused in part due to recovery rates and also capacity in the system. There is simply not enough raw material.

Britvic have co-invested €5.8m in new rPET manufacturing plant in Esterform in the UK for UK & Ireland (Checkout, 27/11/2019) with 100% of its PET bottles now recycled. Suntory (Lucozade, Ribena) have also committed to making its plastic supply chain 100% recyclable having signed up to the WRAP UK's Plastics Pact (Edie, January 2020).

The Coca-Cola company in Ireland is currently at 50% rPET in its on-the-go formats (Irish Times, 17/8/2019).

Indigenous Irish producers too are committed to rPET systems.

So the industry is committed to rPET and will need greater compliance to “feed” the closed loop system.

Packaging Innovation

Producers and packaging companies have been busy creating new and innovative approaches to minimise plastics too, ranging from paper, pouches, aluminium and glass.



Note: There are additional packaging resources available via Bord Bia [here](#)

Novel Materials

One of the more interesting packaging innovations that is making its mark is a seaweed derived pack from Notpla that can be eaten as a pod containing beverages.

These were provided to athletes in the London marathon in 2018 to reduce packaging waste on the course.



Made from Notpla

Ooho and our other packaging solutions are made from Notpla, a material made from seaweed and plants that disappear, naturally.

Our products [➤](#)

5 Personalisation

We are individuals with individual health, taste and nutritional needs and this trend is a reflection of that and the control that we can now have to create beverages that suit us.

Key Forces:



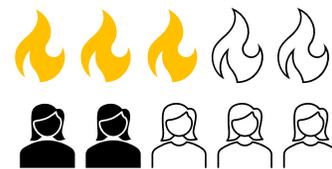
Photo by Ilya Iix on Unsplash

5.01 Tailored Tastes

According to Global Data, consumers are looking for more bespoke, individual experiences, with 61% of global consumers expressing an interest in creating their own products. (Global Data, 2019)

Pepsi's 'Drinkfinity' system allows you to do this, but simpler water-additive taste solutions like Robinsons and Mio.

BUZZ

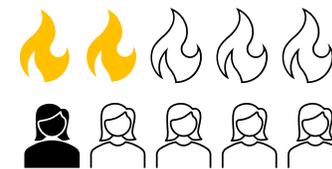


Think About.....

Drops to add to your product or to water to give it a flavour twist; this can have an ethical dimension too!

5.02 Home Tech

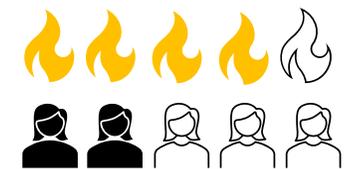
1 in 6 Belgian households currently owns a soda maker machine. (GFK, 2017)
2018 saw a huge comeback in SodaStream for fun at home beverage production.



Can you facilitate your drinkers to customise at home and create their own and have a little fun?

5.03 Personal Nutrition

Health-promoting juice shots in small to-go bottles are providing consumers with a quick, natural boost of nutrition for their busy lives. Cafés on the continent are offering these and on the high street brands with brands like Mio, Zero and Oxygen are bringing it to the masses.



RELEVANCE

Ways to create a system to deliver specific personalised nutritional/medicinal drink. The difference here is functional.

5 Personalisation

5.01 Tailored Tastes

Pepsi Home Made



USA

Pepsi Home Made caps allow you to customize your drinks with the perfect amount of flavour and carbonation.

[Source: PepsiCo](#)

5.02 Home Tech

Life Fuels



USA

Smart nutrition bottle that turns normal water into flavoured water with vitamins and nutrients at home.

[Source: Life Fuels](#)

5.03 Personal Nutrition

OXiGEN shot



USA

The product is said to help your brain and body after workout or a night out. Just add to OxiGen water.

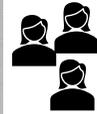
[Source: OxiGen](#)

Key Forces:



5 Personalisation

This trend is in its infancy and in relative terms is niche, but the creation of drinks “systems” represents an interesting space to explore for brand owners and the ability to tailor to suit generates experimentation and engagement.

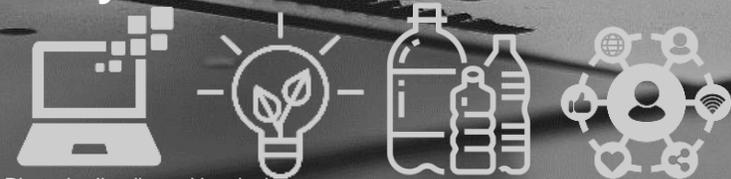


KEY CATEGORIES:

Water base but extension territory for cordial, sports, energy and functional drinks.

Capture your thoughts here.....

Key Forces:



6 Stripped Back

This is all about simplicity and transparency; taken as a sign of quality and authenticity this is a trend we see in all areas of food and drink. Nothing to hide; as things should be.

Key Forces:

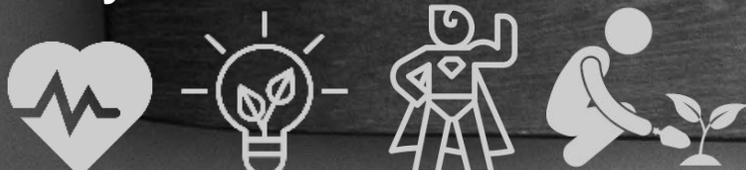
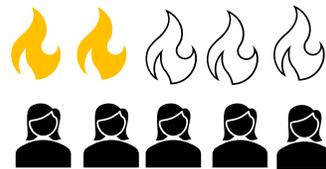


Photo by Louis Hansel @shotsoflouis on Unsplash

6.01 Free From

The consumer desire for purity in a world where there is a heightened sensitivity to health and a common mistrust of producers, the drive for “clean labelling” is pervasive. No artificial ingredients is the panacea, and ideally no sugar either! But there are also opportunities in Vegan claims, non GMO etc.

BUZZ

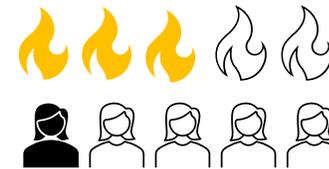


Think About.....

How can you strip back your product to minimise additives and make the label legible for consumers?

6.02 Ancient Elixirs

According to Mintel “people are seeking the safety of products that are recognizable rather than revolutionary,” and that manufacturers should look to “ancient recipes, practices and traditions” as a source of innovation.



Are there ancient recipes or ingredients that could credibly fit with your product to bring authenticity and intrigue?

6.03 Herbal Essences

Half of supplement users now take a herbal/botanical supplement. (CRN 2019) Nearly one-third (31%) of adults now consider herbal flavours highly appealing, up 5% over the past two years. (Technomic 2019) Our experts are excited by the potential that herbs have to offer in the future.



RELEVANCE

Is there a herbal twist that you can add to bring a natural edge or functional benefit?

Trend

6 Stripped Back

Expressions

6.01 Free From
Cappri



Poland

This product is gluten free, no sugar added, low fat, no additives or preservatives and is made with 100% watermelon juice.

[Source: Mintel GNPD](#)

6.02 Ancient Elixirs
Humble Warrior



UK

This is a botanical sparkling drink made with turmeric, Indian gooseberry, black pepper, ginger, mango and mandarin. It's low calorie with no sugar added.

[Source: Humble Warrior](#)

6.03 Herbal Essences
Firefly



UK

Made with still water, fruit juice and herbal essences such as thyme, kola nut, elderflower and rosemary. This product can be used on its own or as a mixer.

[Source: Firefly](#)

Key Forces:



Photo by [Louis Hansel @shotsoflouis](#) on Unsplash

Trend

6 Stripped Back

This is all about simplicity and transparency; taken as a sign of quality and authenticity this is a trend we see in all areas of food and drink. Nothing to hide; as things should be.

Key Forces:

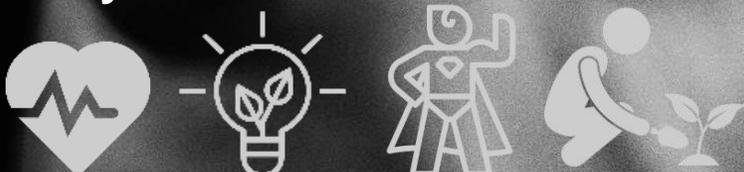


Photo by Louis Hansel @shotsoflouis on Unsplash

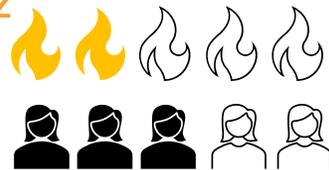
Expressions

6.04 Less Is More

Shorter ingredient drinks are sought after increasingly by consumers. Almost 80% of consumers look for products with fewer ingredients. (Nutrifusion, 2020)

According to Kerry Foods they want “fewer, recognizable ingredients that are free from artificial additives. This is about simplicity and transparency.

BUZZ



Think About.....

Is this something you can aspire to? Fewer, more natural and recognisable ingredients.

6.05 Truly Ethical

Claims of sustainable and ethical beverage production are plentiful, but as we found in our research consumers are sceptical. They are seeking watertight, straight-talking and genuine commitments and clarity.



RELEVANCE

Unequivocal ethicality at the heart of the brand; even in the name; but you have to live it!

LemonAid



Germany

You get dark and sweet blood orange from Sicily, more orange from Brazil, topped up with grapefruit, lemon, a hint of cherry, and a little cane sugar. Made from organic, Fairtrade ingredients that are sourced from small-holders, this is a decidedly more ethical take on supermarket lemonade.

Source: [LemonAid](#)

Consumer Created Innovation

Pains Addressed

Misleading products
Design
Unsustainable packaging

Gains Created

Not complicated
Attractive packaging
Good for you
Simple recipe
Honest

Name It:

Honest

Theme:

"Honest Goodness"

Why this?

There is already too much complication when we try to choose a drink. This type of drink is simple and transparent.

What is it?

It's a morning fruit juice drink.

What makes it great?

It's made with maximum 4 ingredients (water plus fruits, vegetables & flowers). You will enjoy this drink in the morning and its dedicated to people that cares about health. This product can be purchased in independent stores and cafes.

Snappy Tagline

Honest in name, Honest in nature!

When it will be used?

Morning

Who will drink it?

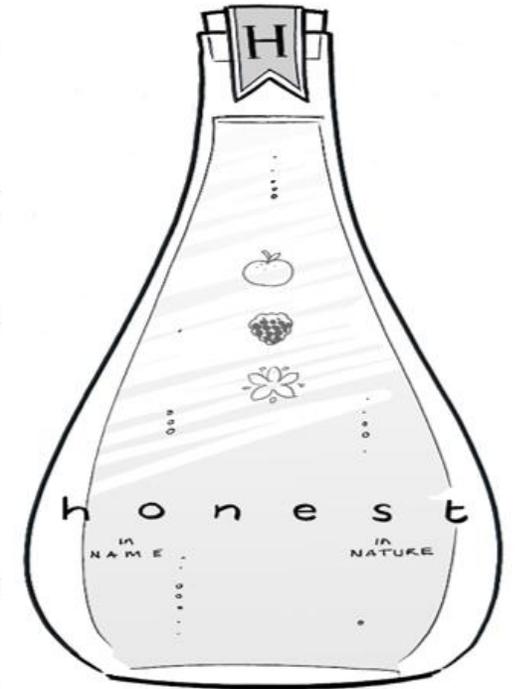
Health conscious people

Where to buy it?

Independent stores & cafes

Type of Pack?

Sophisticated packaging



CONSUMER CREATIONS
Visualised by graphic artist
© Opinions Market Research

A simple, transparent fruit juice made from 4 ingredients (water, fruits, vegetables & flowers). Consumers today want to know exactly what ingredients are going into their products. Clean labels with high ethical values are more important than ever.

Consumer Created Innovation

Pains Addressed

Guilt free
Non ethical
Unsustainable packaging

Gains Created

Sustainable
Ethical
Biodegradable packaging

Name It:

Planet Punch

Theme:

"Planet Friendly Punch"

Why this?

We are all aware of the problems with sustainability, this product is created in the idea to give second use to the packaging.

What is it?

This is a punch-based product to mix with water/ soda/ sparkling water and comes with seeds to grow.

What makes it great?

This type of drink is environmentally friendly, it has more than one use and it has a low impact. It's ethical. You will use this product in social events and festivals. You can buy this product in festivals, garden stores and independent stores. The packaging is biodegradable.

Snappy Tagline

Punch it, Plant it!

When it will be used?

Social events and festivals

Who will drink it?

Environmentally friendly drinks

Where to buy it?

Festivals & garden stores and independent stores

Type of Pack?

Biodegradable



This is a punch-based beverage with biodegradable packaging and comes with seeds to grow. Consumers are becoming more environmentally aware and want eco-friendly packaging. They want packaging to be designed in such a way that it can be reused, recycled, or composted.

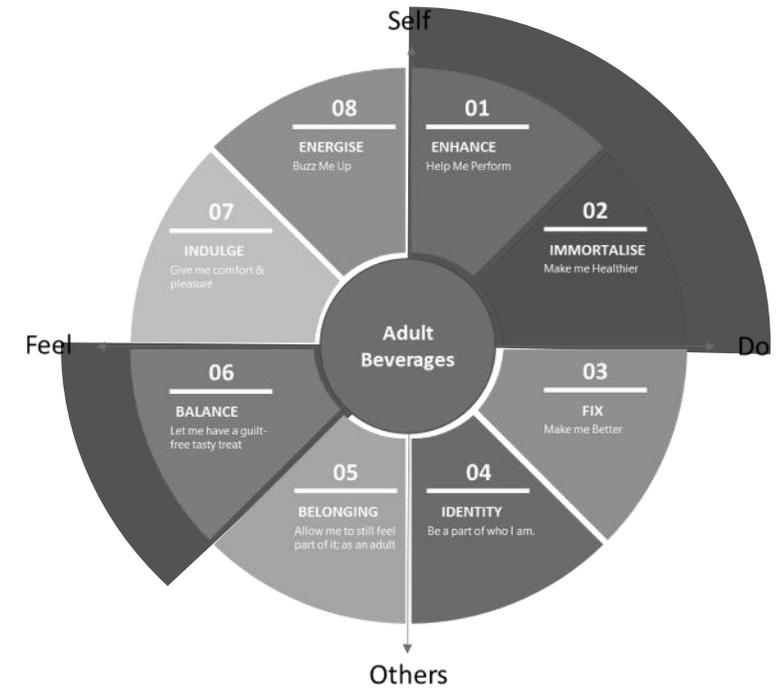
6 Stripped Back

The stripped back promise delivers balanced pleasure and a sense of spiritual and physical wellbeing. This is one of the leading ways of adding value to your beverage proposition.

Key Forces:



Photo by Louis Hansel @shotsoflouis on Unsplash



KEY CATEGORIES:

In an environmental sense water is a focus here, but beyond these flavours generally including seltzer can be amplified for juices and smoothies. How can you strip back your beverage?

Capture your thoughts here.....

Consumer Created Innovation

Pains Addressed

Guilt Free
Unhealthy Ingredients

Name It: **Glás**

Theme: "Truly Healthy"

Why this?

This is a healthy variety.

What is it?

This drink is made with fruits and vegetables in season.

What makes it great?

What it makes this product great is the natural ingredients, bits and its taste! It's delicious! Because less is more! You can use this drink daily and it's dedicated to grown-ups.

Snappy Tagline

It is what it is!

When it will be used?

Daily

Who will drink it?

Grown-ups

Where to buy it?

Supermarket

Type of Pack?

Glass bottle



CONSUMER CREATIONS
Visualised by graphic artist
© Opinions Market Research

This idea was created from mapping traditional drinks perception in the market as some drinks come across as healthy options but their components are not as healthy as we think. Using fruit and vegetables in seasons and simple recipes will earn those healthy qualities that consumers are looking to find in their drinks.

7 Exploration

Consumer's loyalty to beverage brands is becoming eroded by the proliferation of choice and they are embracing the opportunity that this presents to explore and experiment with new things.

Key Forces:

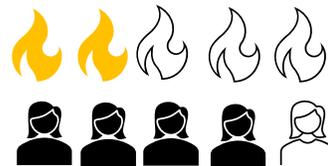


Photo by Mathieu CHIRICO on Unsplash

7.01 New Horizons

Trends are originating from anywhere in the world and reaching us much more quickly today. Many brands are making their way around the world and therefore we are ending up with a wide variety of options. We see leading brands experimenting all the time with new exotic variants to retain interest. Red Bull and Monster for example.

BUZZ

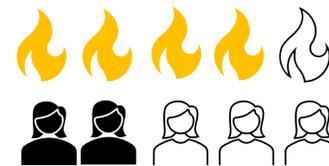


Think About.....

Are there heroes from around the world that you can bring it to expand our horizons; drinks of the world. Think of the rise of pomegranate, cranberry and coconut in the past.

7.02 CBD Infusions

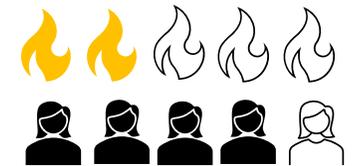
The global cannabis beverages market size is expected to reach USD 2.8 billion by 2025. (*Grand View Research*) However, for the local Irish and UK markets the expectations are more subdued as the psychoactive agent isn't yet legal here. Nonetheless there is a lot of intrigue in this area which will continue for some time.



A CBD infused drink can become an integral part of a larger healthier and holistic lifestyle (managing stress, wellness routine) – is it for you?

7.03 Flavourful

Almost 8 in 10 (77%) of global respondents said they would love to explore new flavours and types of drinks. (*Opinions Global Survey*) According to Euromonitor, 60% say that they spend money on “experiences” and therefore prefer creative, exciting and unusual tastes. (*Euromonitor*) Humans are curious to try new things.



RELEVANCE

Can you bring a sense of excitement to your brand through variant guests or limited time flavour options?

Trend

7 Exploration

Expressions

7.01 New Horizons

Aje Big



Thailand

This product is made with blueberry and lime flavours.

[Source: Mintel GNPD](#)

7.02 CBD Infusions

Green Monkey CBD



UK

Alternative to caffeine based drinks offering consumers relaxation and enjoyment.

[Source: Green Monkey CBD](#)

7.03 Flavourful

Pepsi



Japan

This product is a limited edition launched this year. It has orange flavour.

[Source: Mintel GNPD](#)

Key Forces:



7 Exploration



This variety seeking brings a spirit of adventure that allows for indulgence and expression. For a certain cohort there is an openness to experimentation who often marks the path for others to follow and this zone is for them.

Key Forces:



KEY CATEGORIES:

Flavoured Waters, Smoothies and flavoured CSDs, but all categories can extend some creative and experimental flair.

Capture your thoughts here.....

8. Blurred Lines

Beverage categories are not so neatly defined anymore. With restless consumers, evolving demands and global influences, lines between categories that are blurring with the injection of “magic” by borrowing from other tangential categories.

Key Forces:

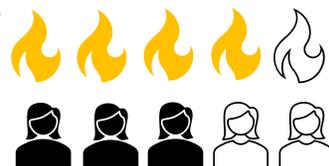


Photo by Christopher Johnson on Unsplash

8.01 Energy 2.0

64% of global consumers said they often use drinks for energy to get them through the day. (*Opinions Global Survey*) But energy often now has a twist of added value; vitamins or added **natural energy**. This is a big topic on its own, but Monster and Red Bull are embracing the need to constantly reinvent and maintain relevance.

BUZZ

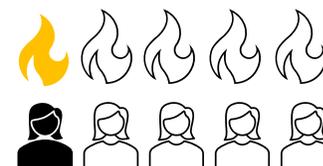


Think About.....

Guarana, Ginseng, Low caffeine, Matcha, B vits... Adding a new (more natural) dimension to the much-maligned energy drink.

8.02 Medley Mash-Ups

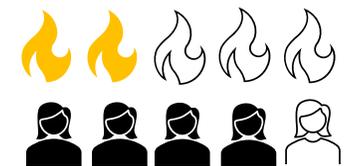
From Pepsi White yoghurt Cola and Bilk containing both Beer and Milk to Coca-Cola's Salad Water; the drinkable Lettuce Leaves from Japan..... There are lots of weird and wonderful combinations going on. Consumers can get involved too, like Fanta's flavour lab in Australia which invited fans to “mix, name and submit” their favourite combinations.



Are there ways that you can fuse flavours to create new combinations that work?

8.03 Water 2.0

More than 7 in 10 Americans (72%) say bottled water (still and/or sparkling) is among their most preferred non-alcoholic beverages. (*IBWA, 2019*) But it is under attack from refillables, fonts and the plastics debate. The “pimping” of water is adding value and sustaining its growth.



RELEVANCE

How can you make water better? Alkinity, Origin, Potassium, Vitamin C, Vitamin B6 and Vitamin B12 (See next page)

Focus: Water 2.0

While water continues to be the top beverage, with a drive toward refillable water bottles, fonts, price pressure and evolving consumer demand, standard bottled water has needed to react, and it has.

The **priority for water brands has to be on adding value** and it has been doing so by building in functionality beyond hydration, with an ever more exotic array of functional enhancements to maximise value from consumers...



*For Expectant Mums add
Folic acid and vitamins*



*For exercise add
protein & caffeine*



*For functional
recovery add oxygen*



*For energy add
caffeine & vitamins*



*For relaxation
add hemp*

That's not to mention the proliferation of intriguing flavoured waters, spritzers and infusions that are making their way onto the market.

8 Blurred Lines

Key Forces:



8.01 Energy 2.0

Starbucks Triple Shot Energy



USA

The product is made with caffeine, maltodextrin, inositol, guarana, B vitamins, ginseng.

[Source: Mintel GNPD](#)

(See next Page too).

8.02 Medley Mix

Pepsi Café



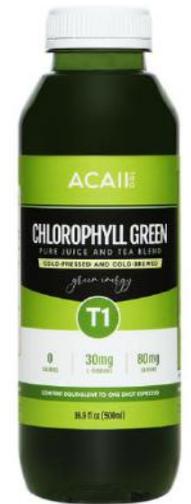
UK

This drink from Pepsi features the Cola classic with a twist of coffee for a burst of caffeinated, cold filtered goodness.

[Source: Pepsico](#)

8.03 Water 2.0

Acai Elixir



Indonesia

This Chlorophyll water helps the metabolism by improving the oxygen circulation in the body. The product contains 0 calories, 80 mg of caffeine and 30 mg L-Theanine to help us to stay focused.

[Source: Acai Tea](#)

8 Blurred Lines



Key Forces:



Photo by Christopher Johnson on Unsplash

8.01 Energy 2.0

Next Generation Energy has a strong natural dimension to it. These two examples show how this can be done.



Inspired by the Sherpa Tenzing, the caffeine in this is derived from coffee beans, green tea, and guarana.

USA

[Source: Tenzing](#)



A light, lasting energy seltzer (sparkling energy water) using all natural ingredients. It is unsweetened with zero calories.

USA

[Source: Hiball](#)

Consumer Created Innovation

Pains Addressed

Traditional unhealthy energy drinks
Work appropriate
Sugar

Gains Created

Natural ingredients
Slow release energy
Caffeine alternative
Taste
Enhance performance

Name It:

Swift

Theme:

"Alternative Energy"

Why this?

It's a gentle release energy drink which implies speed without being aggressive.

What is it?

It's a refreshing nature taste like San Pellegrino, it has a fresh smell and a clear pale colour- rose sparkling.

What makes it great?

It has a slow release of energy and is a caffeine alternative. It's a sophisticated adult drink that's work friendly.

Snappy Tagline

Get you moving swiftly along!

When it will be used?

Mornings

Who will drink it?

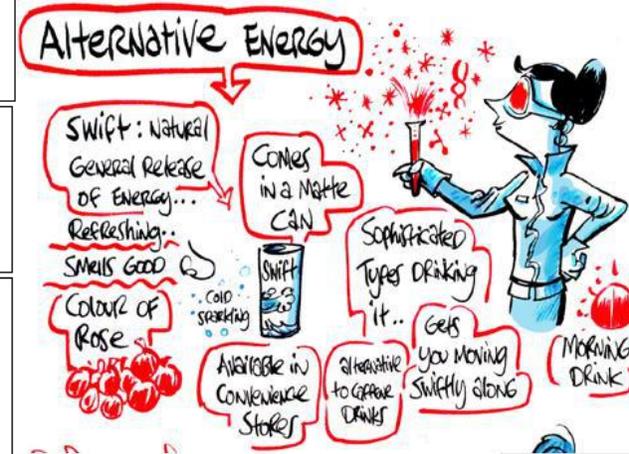
Grown-up people

Where to buy it?

Convenience stores

Type of Pack?

Matte can-330ml
Plain and simple



CONSUMER CREATIONS
Visualised by graphic artist
© Opinions Market Research

Alternative and natural sources are some of the reasons why this idea was created. Consumers are expecting to see more natural and healthy sources to replace ingredients such as caffeine without compromising the pick me up effect. This type of drink will also respond to the need to find brands that are more adult branded and can be consumed at work.

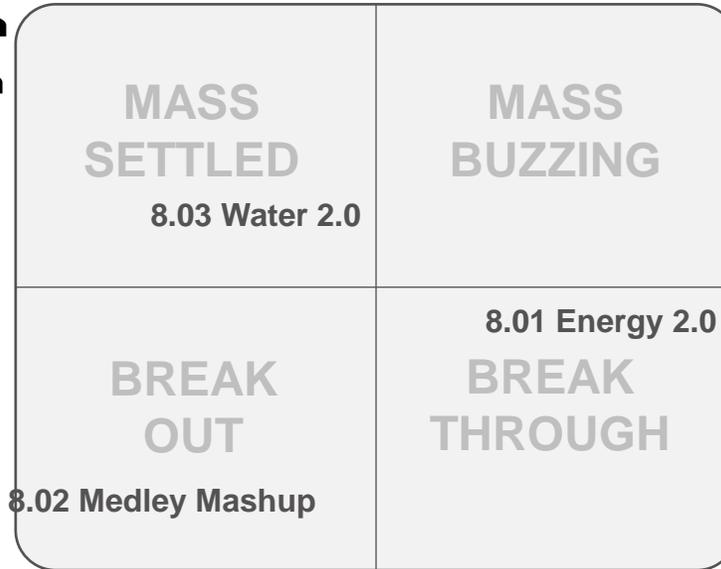
8 Blurred Lines

With the drive for health and functionality, categories will borrow from each other to develop solutions across the needs map, but these examples sit within the Energy and Enhance zones in particular.

Key Forces:



Photo by Christopher Johnson on Unsplash



KEY CATEGORIES:

This is a playground for all categories, but Water, Energy and CSDs fit most naturally.

Capture your thoughts here.....

Opinions
clarity and confidence

Trends Overview

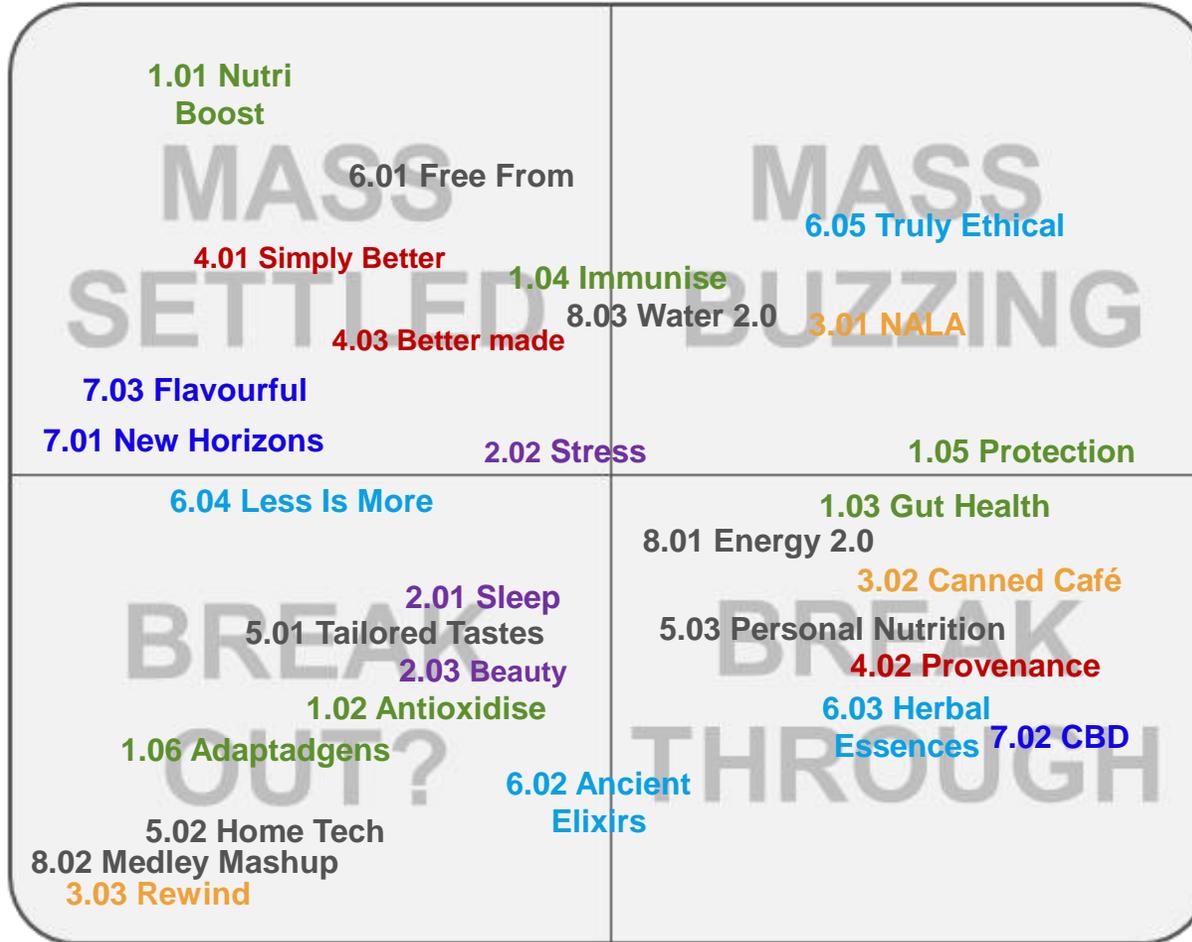
Mapping

TRENDS & EXPRESSIONS

Wrapping Up



These Expressions have mass market interest but they are relatively settled in terms of current “buzz” in the market as they are more established trends



These are resonating with the masses and are buzzing right now. Well established trends that may be peaking in terms of opportunity.

Expressions here are of relatively niche interest overall, but as trending phenomena have the potential to break out

These are exciting expressions that are buzzing at the moment and are resonating strongly with a niche within the market; clear potential here to break through to the masses.



Trends>

FUNCTIONAL HEALTH

FUNCTIONAL WELLNESS

ADULTIFICATION

PREMIUMISATION

PERSONALISATION

STRIPPED BACK

EXPLORATION

BLURRED LINES

SECTION FOUR

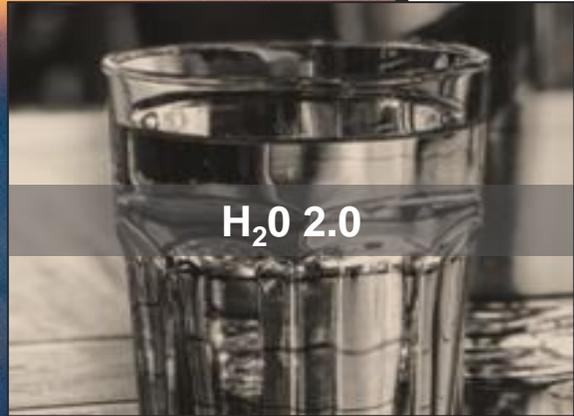
Opinions
clarity and confidence

Some Beverage Futures
Ideas Worth Testing

Introducing the “Futures”

- Following a review of the emerging consumer insights, in collaboration with the Bord Bia team, we developed a series of illustrative “**futures**” in order to explore some of the more interesting emerging themes.
- A total of n=7 alternative futures were explored across 6 countries: IE, UK, DE, FR, NL & US among a total of n=4,260 beverage drinkers aged 18-49.
- The survey included a selection of general interest topics as well as a review of these futures using standardised metrics as follows:
 - **Belief**; *that they will become a reality*
 - **Consumer Connection**; *that they will become a popular choice*
 - **Desire**; *at a personal consumer level; a product for me*
 - **Relevance**; *to solving a consumer problem*
- A summary of these findings are provided here...

THE FUTURES



Sum Up on Futures

There is clear gravitational pull toward **more natural and sustainable propositions** in line with the market Forces identified earlier. However, it is worth noting that these features are **fast-becoming “expected”** by consumers.

Both *Non-Alc Tipples* and *Fermented For More* are expected to make it to the big time, despite not being a strong draw for the respondents themselves which indicates that their functional pulling power will see them win despite a reluctant base of active supporters.

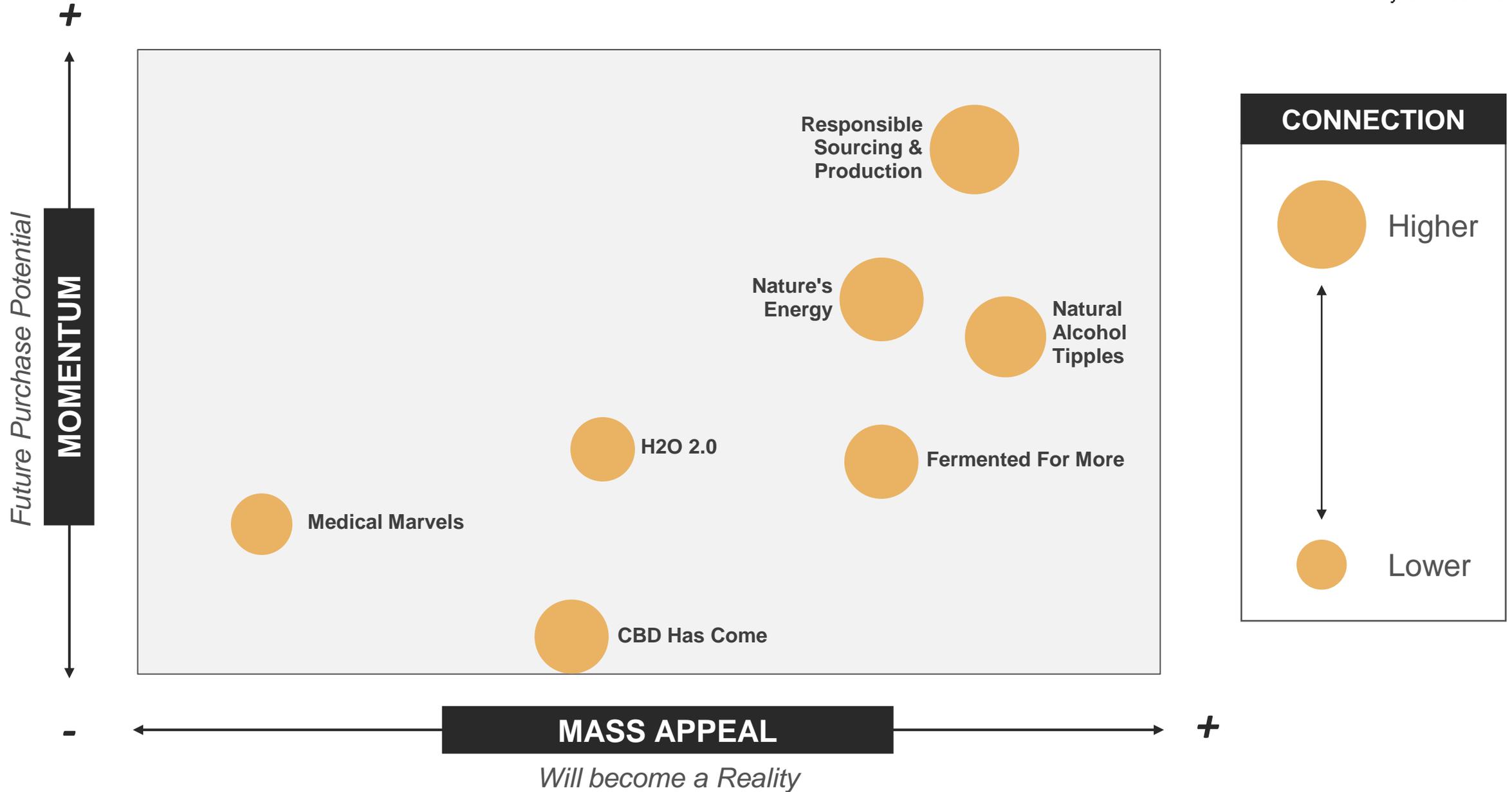
The remaining *Medical Marvels* and *CBD* are likely to remain niche, but they are aligned with identified needs and will find a dedicated following in the marketplace.

All of these futures will play a role and will be a growing part of the future of beverages.

Opinions
clarity and confidence

A brief look at the futures

Futures Mapping

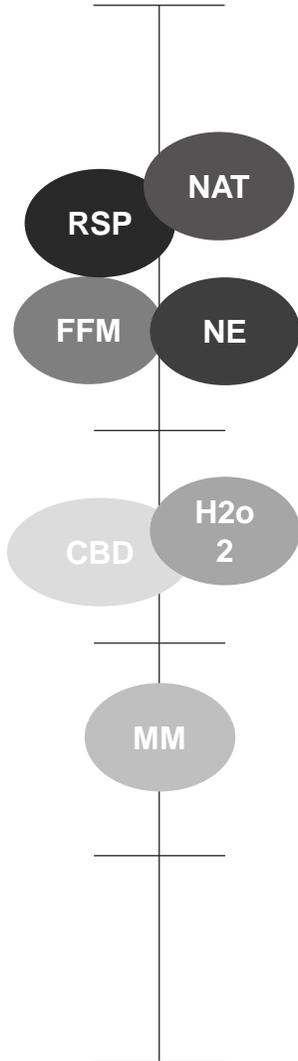




BELIEF

Will become a Reality

Strongest

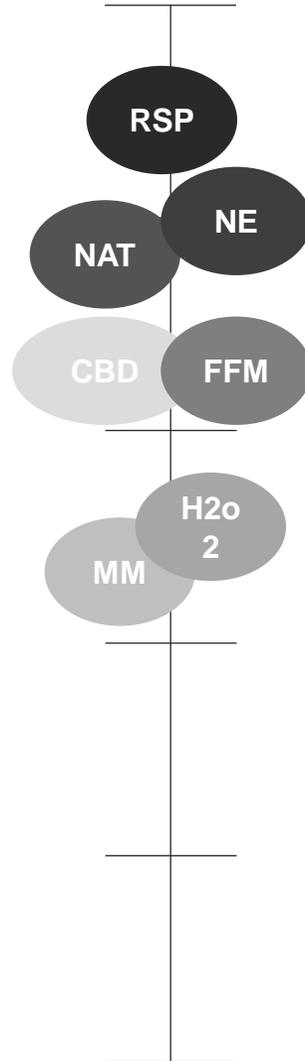


Weakest



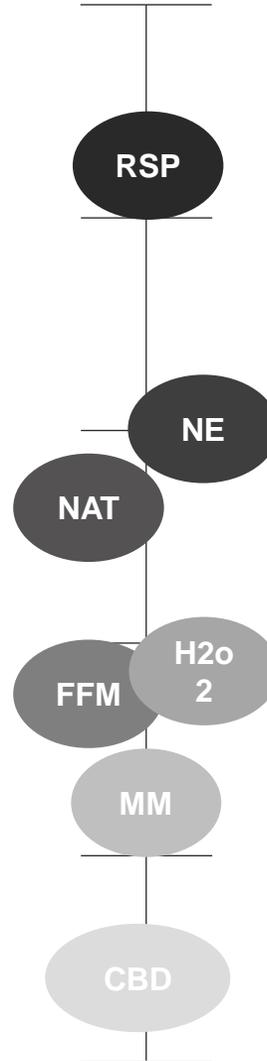
CONNECTION

Future Popularity



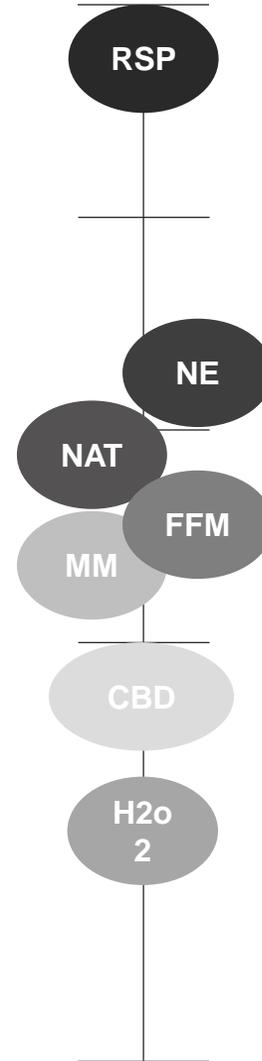
DESIRE

Future Purchase Potential



APPLICATION

Solves a Problem



KEY





Photo by Kobby Mendez on Unsplash

Non Alc Tipples

We all want to feel like we are part of the fun on a night out, but sometimes drinking alcohol isn't an option....

For busy lives and healthier lifestyles, non-alcohol versions of adult favourites are finding their groove.

Whether it's alcohol free beer, wines or even no alcohol gins, vodkas and whiskies; there is no need to miss out.

Be part of it.



BELIEF

Will become a Reality



CONNECTION

Future Popularity



DESIRE

Future Purchase Potential

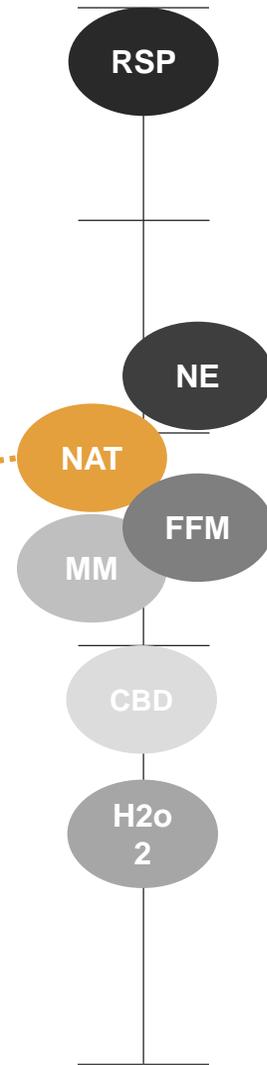
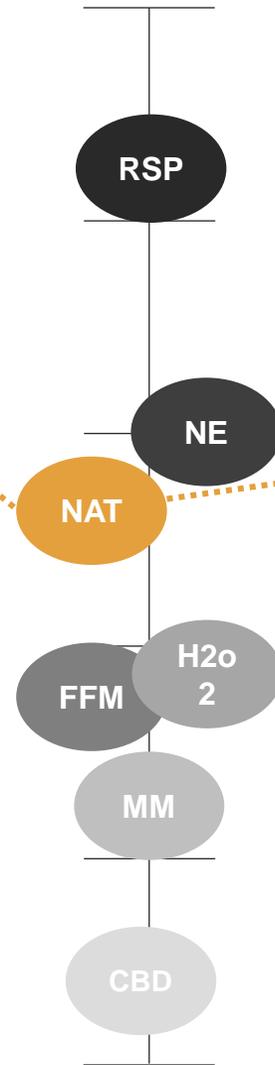
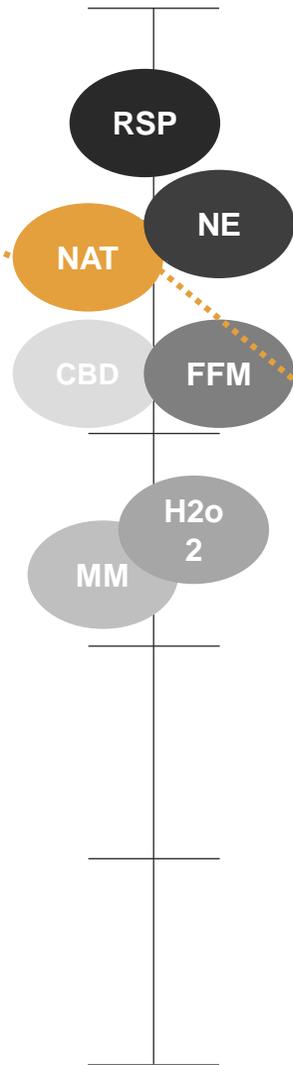
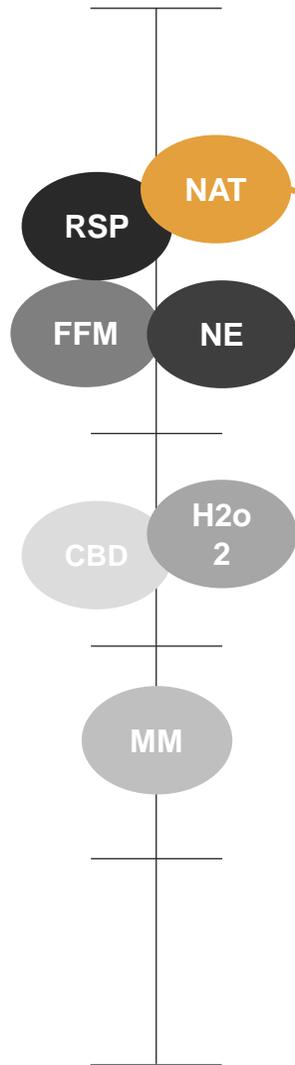


APPLICATION

Solves a Problem

Strongest

Weakest



KEY

RSP

Responsible Sourcing & Production

NE

Nature's Energy

NAT

Non Alcoholic Tipples

FFM

Fermented for More

H2o 2

H2O 2.0

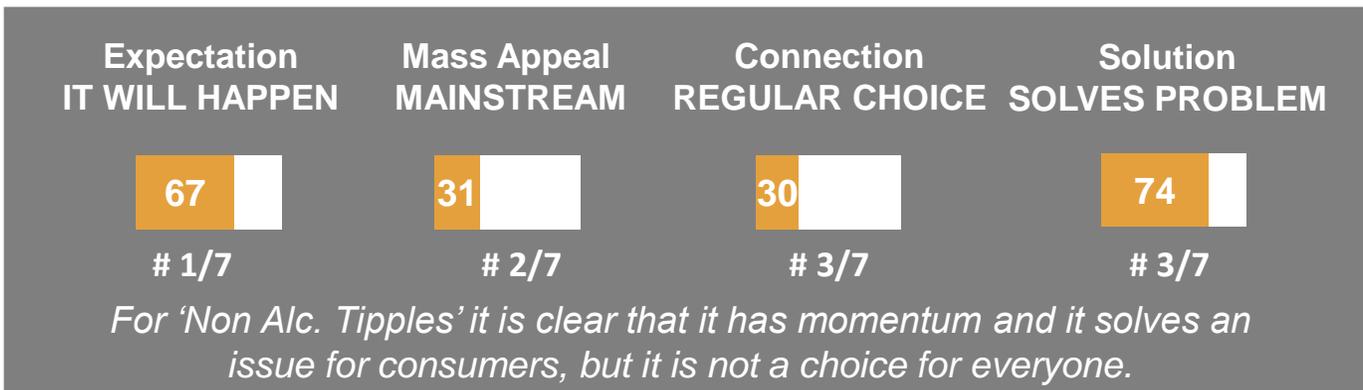
MM

Medical Marvels

CBD

CBD has come

Non Alcoholic Tipples



**Backing
This Future**



#1

AND...

**Overall
Preference**

1/7

**A top Tier
Performer
overall with
high
expectations for
growth**

NEEDS FIT...

BELONGING

BALANCE

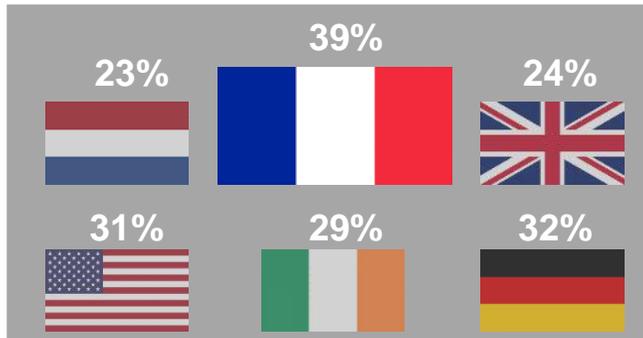
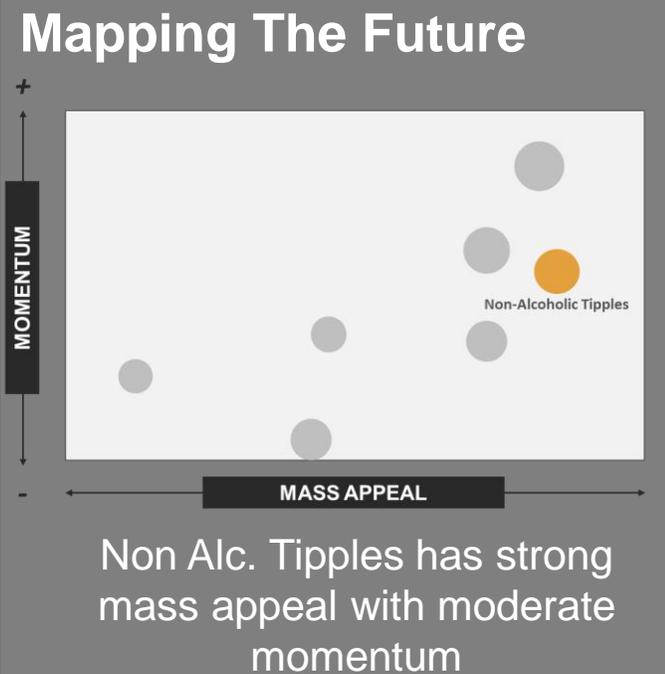
FORCES...



RESONATES WITH...

- Female Oriented
- Under 35 year old
- Workers
- City / urban area
- Non-alcoholic beer tends to be most often consumed

IT SHOWS UP HERE...



A hand holding a green globe with leaves. The background is a soft-focus green landscape. A semi-transparent white circle is overlaid on the left side of the image, containing text.

Responsible Sourcing & Production

Doing the right thing is important to us all, and beverages are changing to meet this challenge.

Of course eco-friendly packaging is important but this idea goes way beyond packaging. It will see more ethical and sustainable sourcing of water, lower carbon footprint production, less waste and the use of more local ingredients.

Beverages in the future will be cleaner with fruit water and other ingredients sourced and managed in a more sustainable way.



BELIEF

Will become a Reality



CONNECTION

Future Popularity



DESIRE

Future Purchase Potential

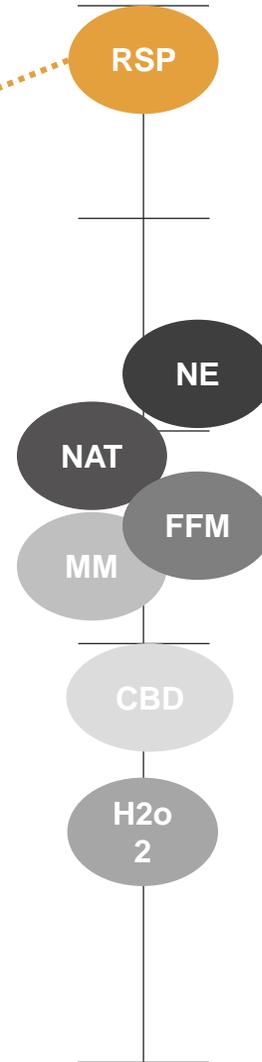
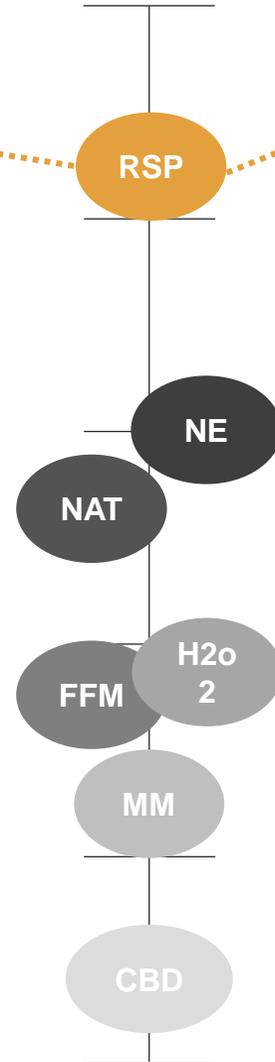
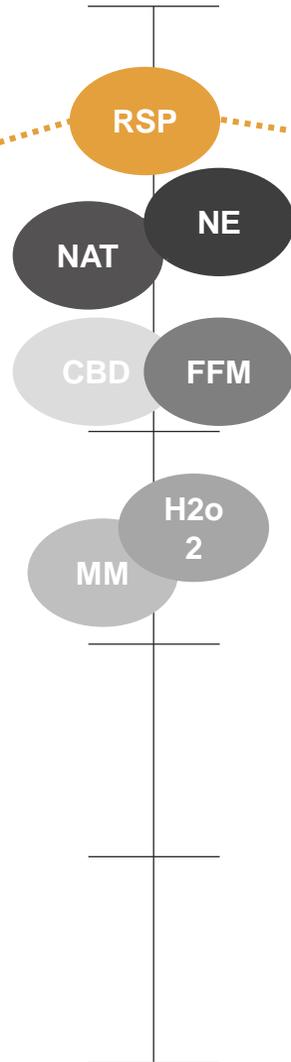
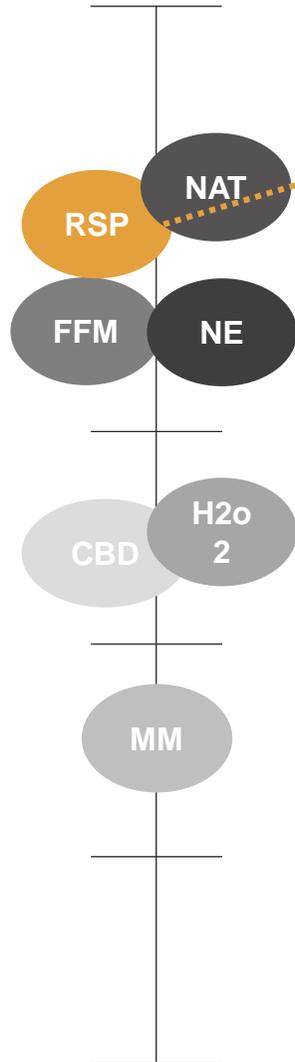


APPLICATION

Solves a Problem

Strongest

Weakest



KEY



Responsible Sourcing & Production



Nature's Energy



Non Alcoholic Tipples



Fermented for More



H2O 2.0

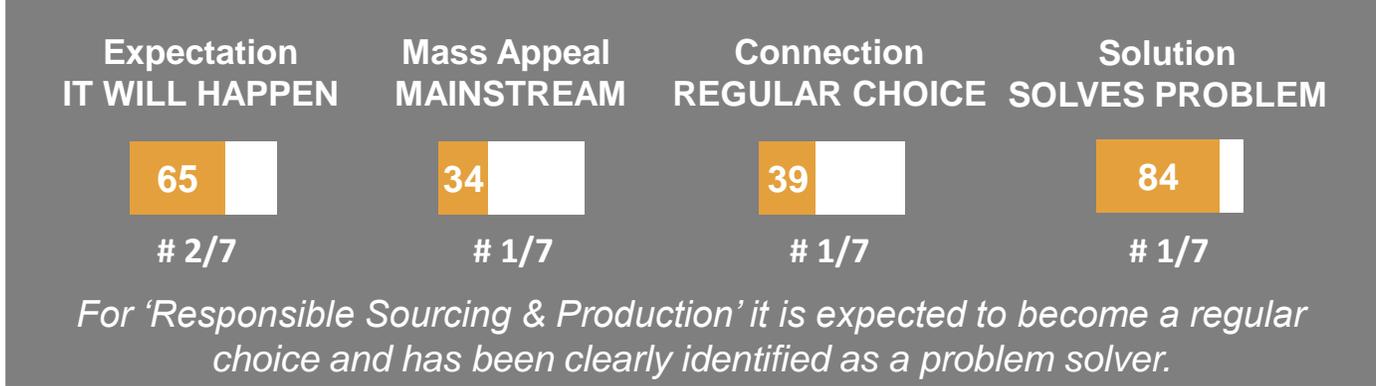


Medical Marvels



CBD has come

Responsible Sourcing & Production



**Backing
This Future**



#2

NEEDS FIT...

IDENTITY

BELONGING

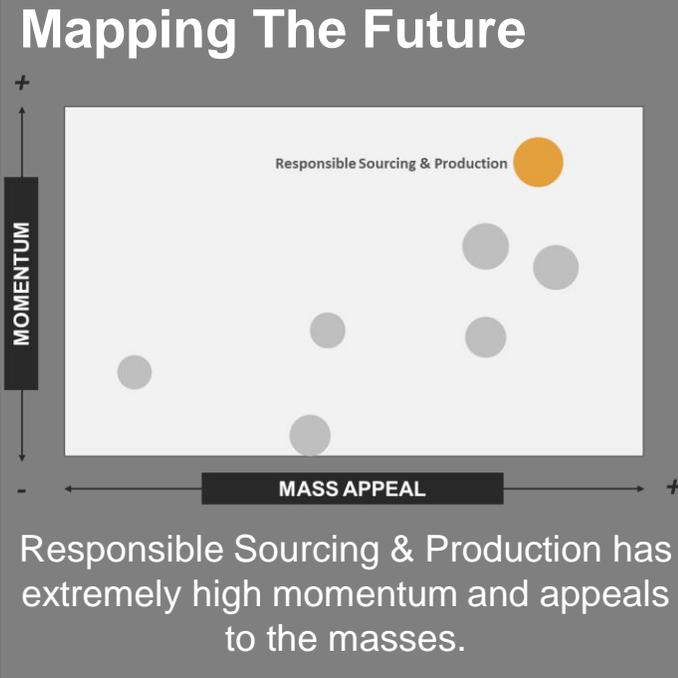
FORCES...



RESONATES WITH...

- Female Oriented
- 35-39 year olds
- Higher Social Grade
- City / urban area
- Tends to drink Kombucha or Kefir most often

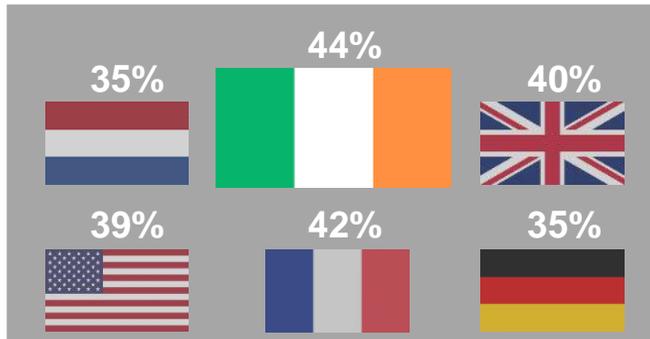
IT SHOWS UP HERE...



AND...

**Overall
Preference**

2/7



Nature's Energy

Drinks are a great way to pick you up and get you through the day.

Lots of the energising drinks out there are full of sugar and unhealthy ingredients.

New Energy will come from a natural fruit extract to deliver a slow release of energy that is also low in calories but with the same effect.

Get the natural buzz.





BELIEF

Will become a Reality



CONNECTION

Future Popularity



DESIRE

Future Purchase Potential

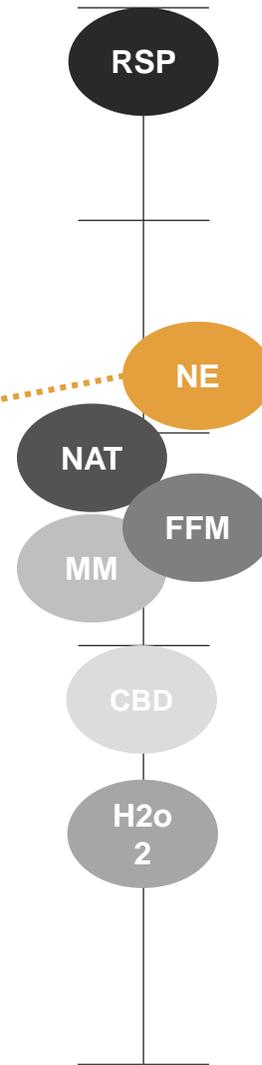
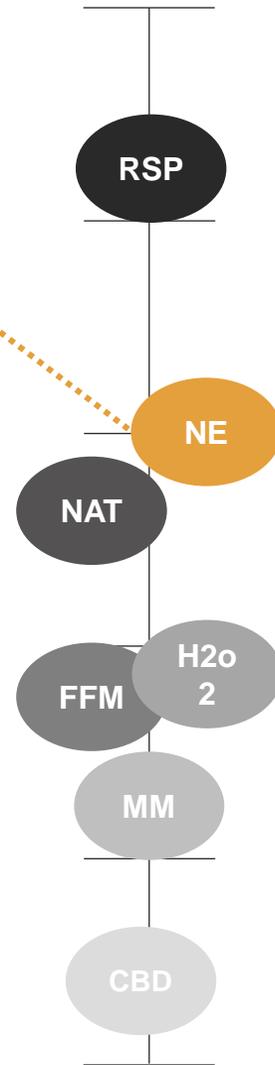
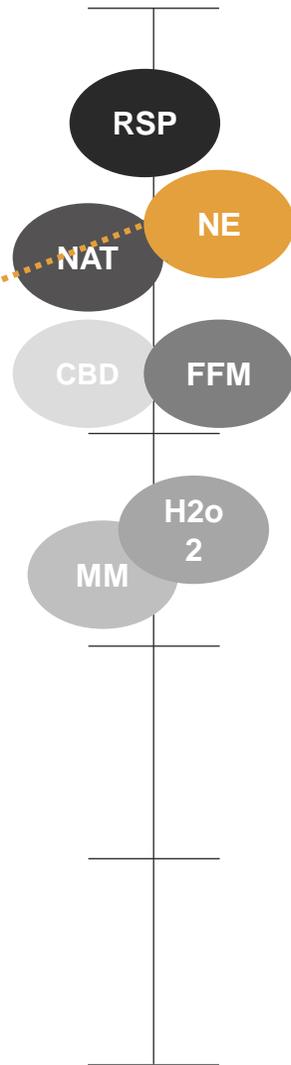
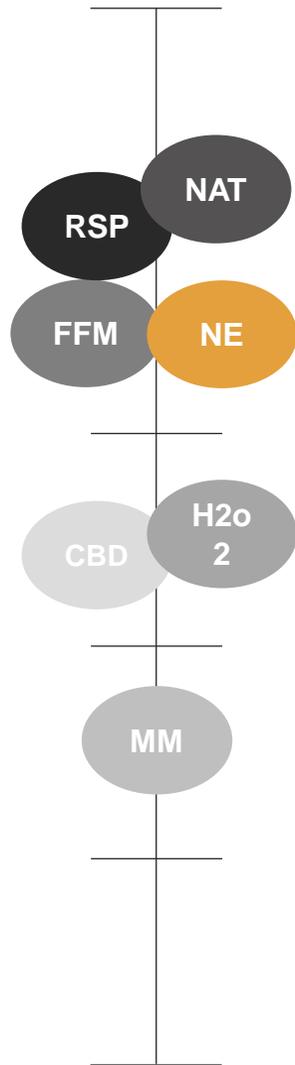


APPLICATION

Solves a Problem

Strongest

Weakest



KEY

RSP

Responsible Sourcing & Production

NE

Nature's Energy

NAT

Non Alcoholic Tipples

FFM

Fermented for More

H2o 2

H2O 2.0

MM

Medical Marvels

CBD

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Photo by Miguel Bruna on Unsplash

Expectation IT WILL HAPPEN	Mass Appeal MAINSTREAM	Connection REGULAR CHOICE	Solution SOLVES PROBLEM
64 # 3/7	30 # 4/7	31 # 2/7	76 # 2/7

For 'Nature's Energy' it's clearly seen to solve a problem and will become a regular choice in the future.

Backing
This Future



#4

NEEDS FIT...

BALANCE

ENERGISE

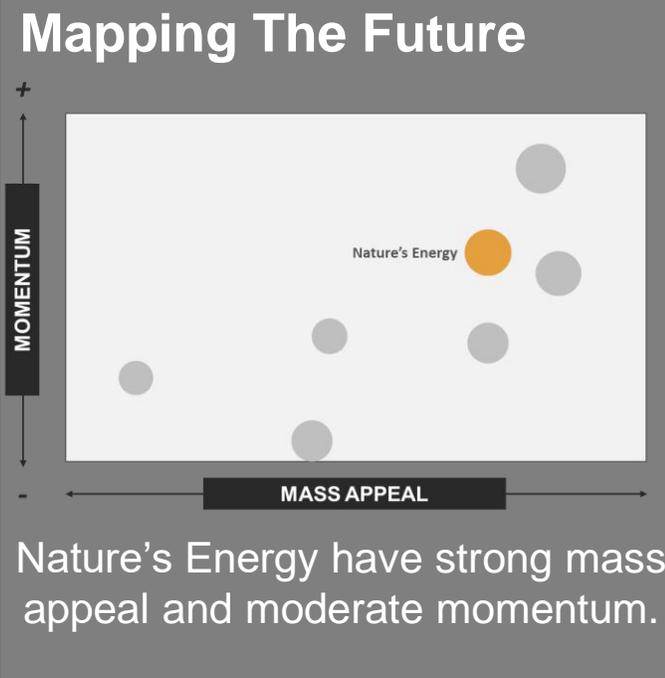
FORCES...



RESONATES WITH...

- Male Oriented
- Lower Social Grade
- 30-34 year old
- Young Families
- City / urban area
- Tends to drink Energy Drinks most often

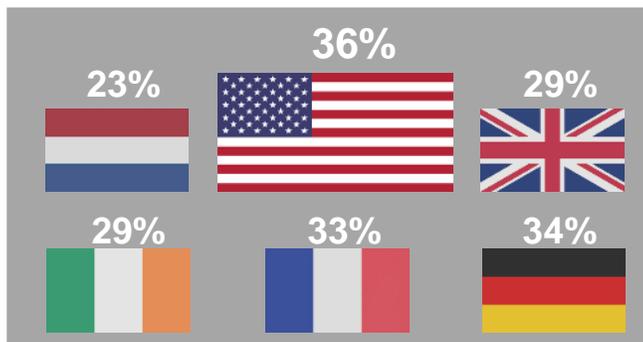
IT SHOWS UP HERE...



AND...

Overall
Preference

4/7



Fermented for More

We hear much more about gut health these days....

Fermented drinks are probiotic-rich and have been found to contain an abundance of benefits, particularly when it comes to gut health.

Kombucha, a fermented tea filled with live bacteria to aid in healthy digestion for instance.

Or Fermented kefir drinks from milk which are rich in probiotics and can be used to help with digestive problems, boost immunity and improve mental wellbeing.

So to keep your gut in check make the move to kombucha.





BELIEF

Will become a Reality



CONNECTION

Future Popularity



DESIRE

Future Purchase Potential

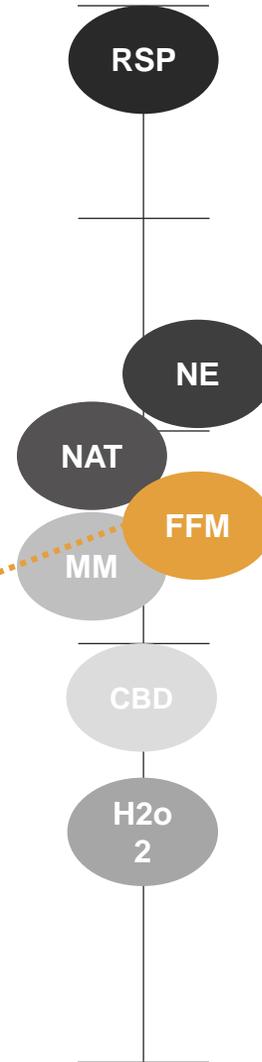
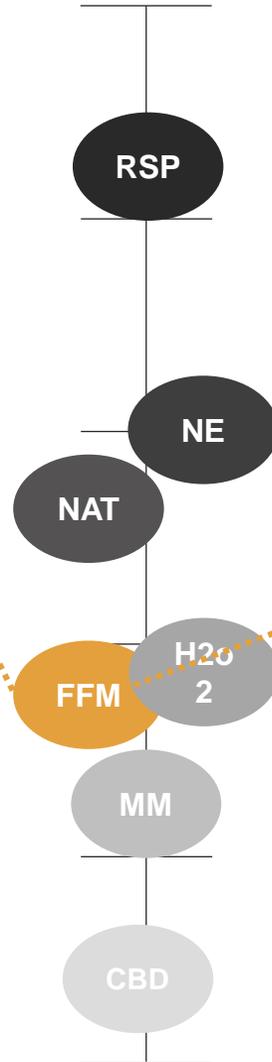
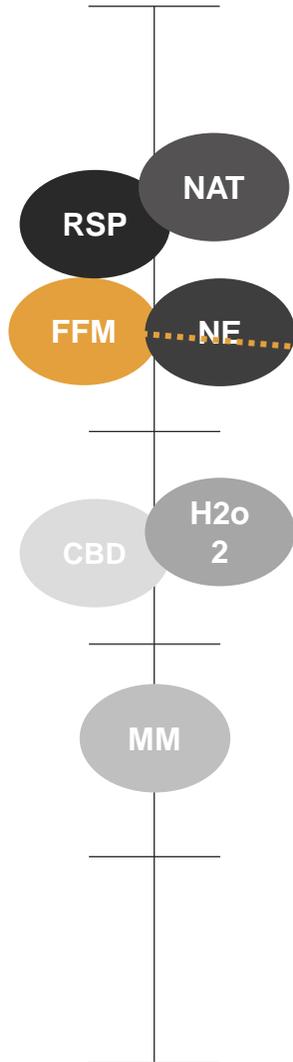


APPLICATION

Solves a Problem

Strongest

Weakest



KEY

RSP

Responsible Sourcing & Production

NE

Nature's Energy

NAT

Non Alcoholic Tipples

FFM

Fermented for More

H2o 2

H2O 2.0

MM

Medical Marvels

CBD

CBD has come

Fermented for More

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Expectation IT WILL HAPPEN

64

3/7

Mass Appeal MAINSTREAM

27

5/7

Connection REGULAR CHOICE

27

5/7

Solution SOLVES PROBLEM

73

#4 /7

'Fermented For More' is not for the mainstream public but holds strong expectations.

Backing This Future



#5

NEEDS FIT...

IMMORTALISE

ENHANCE

FORCES...

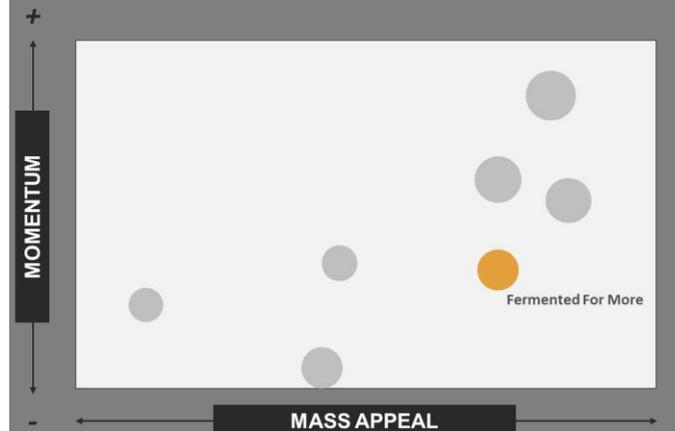


RESONATES WITH...

- Female Oriented
- 35-39 year old
- City / urban area
- Tends to drink Kombucha or Kefir most often
- Married couples & parents

IT SHOWS UP HERE...

Mapping The Future



'Fermented for More' does not have strong momentum at present.

AND...

**Overall
Preference
5/7**

H₂O 2.0

Water is the ultimate elixir of life and source of refreshment, but bottled water isn't the way of the future. We are carrying our own and using public fountains for water nowadays.

Bottled Water will reinvent itself to add other benefits such as electrolytes, vitamins, minerals and other benefits.

Water of the future will go beyond hydration.... Water 2.0 will bring even more to the most healthy choice on the shelf.

Enjoy!



Photo by Clint McKoy on Unsplash



BELIEF

Will become a Reality



CONNECTION

Future Popularity



DESIRE

Future Purchase Potential

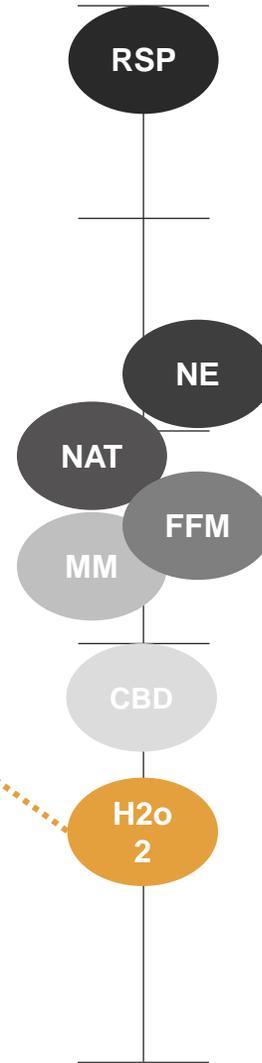
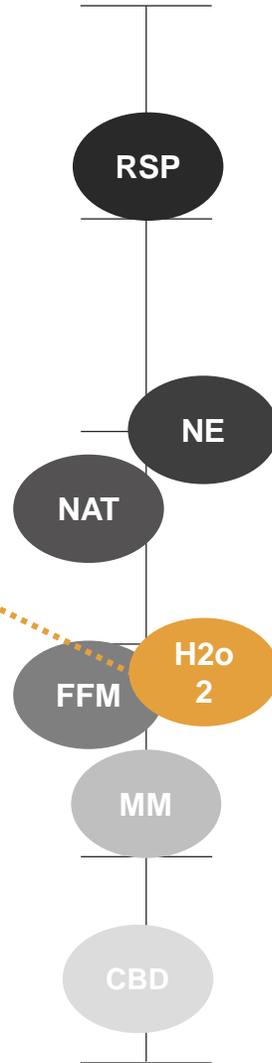
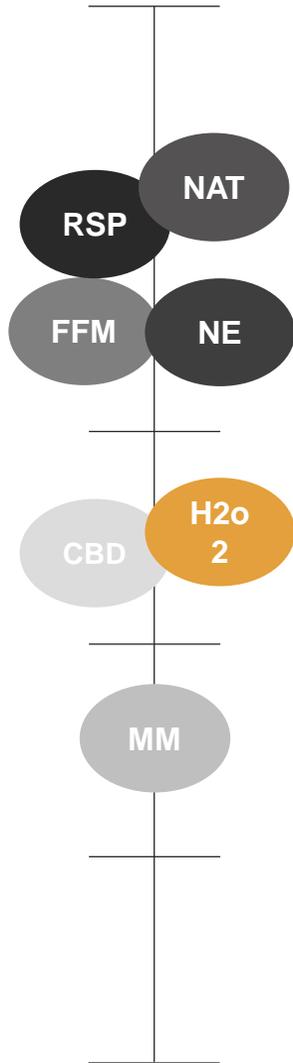


APPLICATION

Solves a Problem

Strongest

Weakest



KEY

- RSP**
Responsible Sourcing & Production
- NE**
Nature's Energy
- NAT**
Non Alcoholic Tipples
- FFM**
Fermented for More
- H2o 2**
H2O 2.0
- MM**
Medical Marvels
- CBD**
CBD has come

H₂O 2.0

H₂O 2.0

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Enjoy!



Photo by Clint McKay on Unsplash

Expectation IT WILL HAPPEN	Mass Appeal MAINSTREAM	Connection REGULAR CHOICE	Solution SOLVES PROBLEM
60 # 5/7	27 # 5/7	30 # 3/7	66 # 7/7

'H₂O 2.0' scores lowest in problem solving when compared to the rest of the concepts but may become a regular choice.

**Backing
This Future**



NEEDS FIT...

IMMORTALISE

ENHANCE

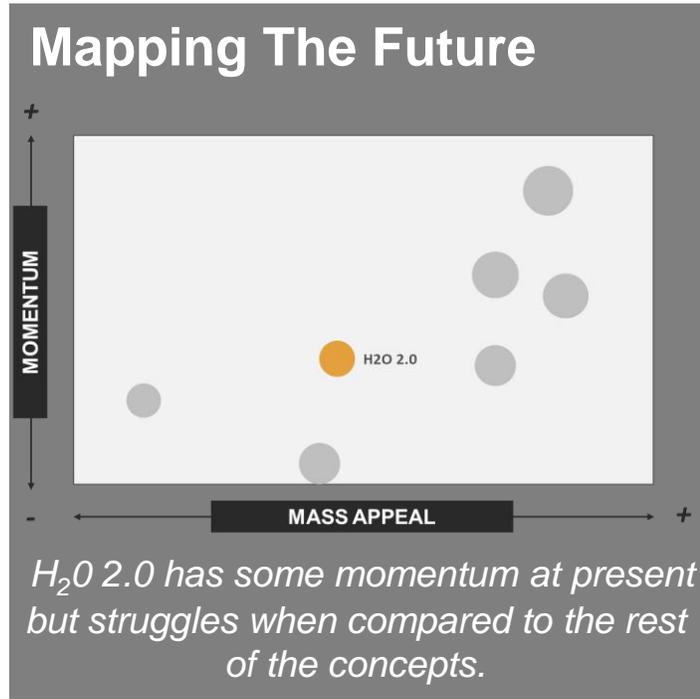
FORCES...



RESONATES WITH...

- Female Oriented
- Higher Social Grade
- 25-29 year old
- Working full-time

IT SHOWS UP HERE...



AND...

**Overall
Preference
6/7**



CBD Has Come

We are all intrigued by the possibilities of CBD....

While CBD-infused beverages have linked with potential benefits for stress relief and pain but it wont get you “high”!

It is a non-psychoactive molecule found in cannabis.

CBD can be part of lots of different types of beverages from non-alcoholic wine, water and kombucha to cold brew coffee.

A new natural choice.



BELIEF

Will become a Reality



CONNECTION

Future Popularity



DESIRE

Future Purchase Potential

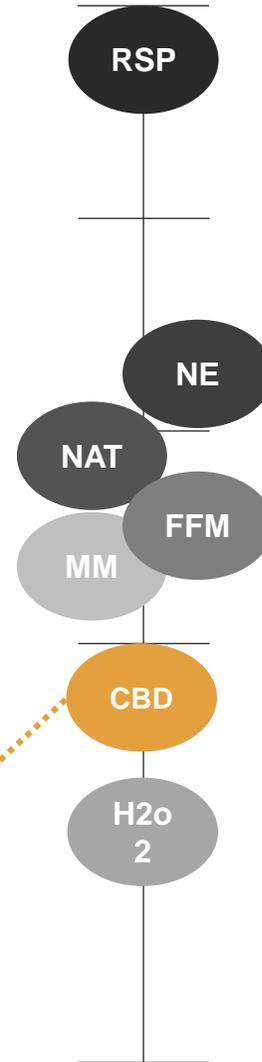
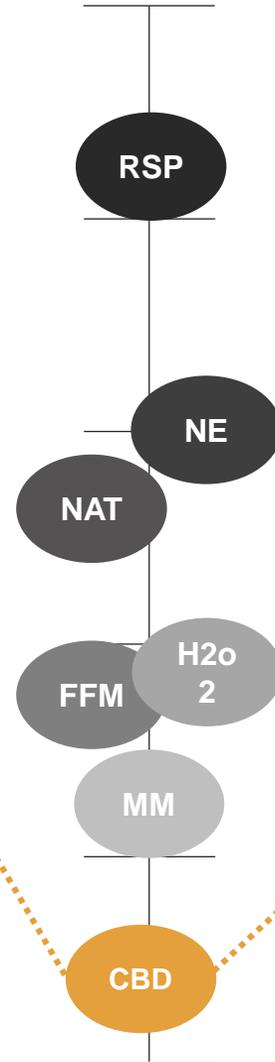
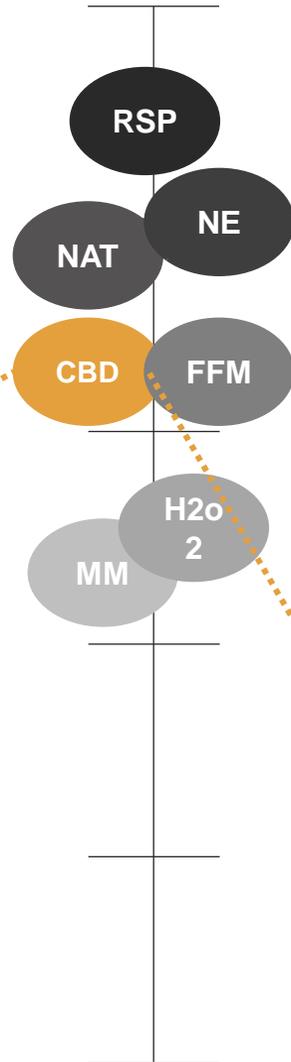
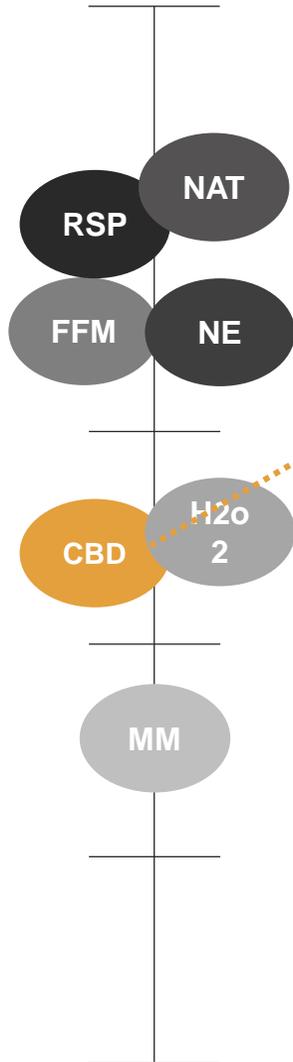


APPLICATION

Solves a Problem

Strongest

Weakest



KEY

RSP

Responsible Sourcing & Production

NE

Nature's Energy

NAT

Non Alcoholic Tipples

FFM

Fermented for More

H2o 2

H2O 2.0

MM

Medical Marvels

CBD

CBD has come

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A new natural choice.

CBD Has Come

Expectation
IT WILL HAPPEN



6/7

Mass Appeal
MAINSTREAM



2/7

Connection
REGULAR CHOICE



7/7

Solution
SOLVES PROBLEM



6/7

The public perception for 'CBD Has Come' is that while it solves a problem and is expected to happen, it isn't expected to become a regular choice.

Backing
This Future



#3

NEEDS FIT...

INDULGE

ENHANCE

FORCES...

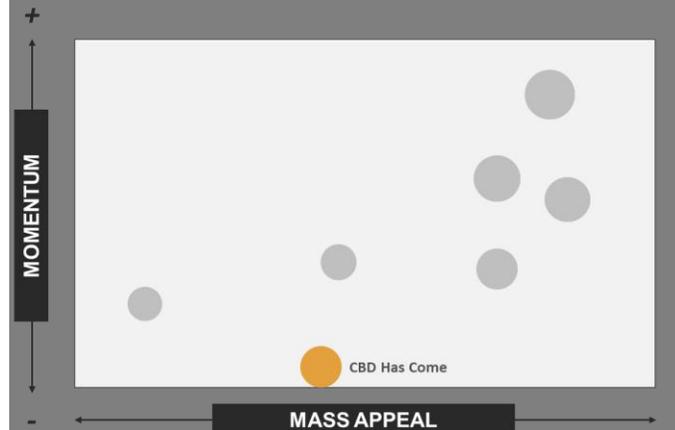


RESONATES WITH...

- 18-24 year olds
- Lower Social Grade
- City / urban area
- Non-working
- Tends to drink Kombucha or Kefir most often

IT SHOWS UP HERE...

Mapping The Future

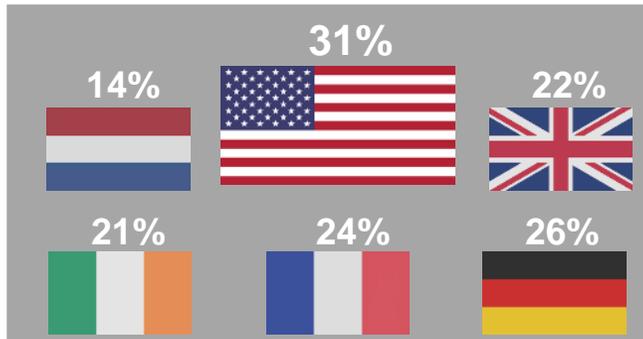


CBD Has Come has low momentum globally and moderate mass appeal.

AND...

Overall Preference

3/7



Medical Marvels

We all need a little help with our health and wellness every now and then. Having more drinks and shots that are proven to make a difference will help us to feel better.

Things like chamomile and magnesium to help with sleep, collagen for your skin or Vitamin A to help with eye damage from excessive screen time.....

Beverages are a great easy way to get goodness in an easy enjoyable way.





BELIEF

Will become a Reality



CONNECTION

Future Popularity



DESIRE

Future Purchase Potential

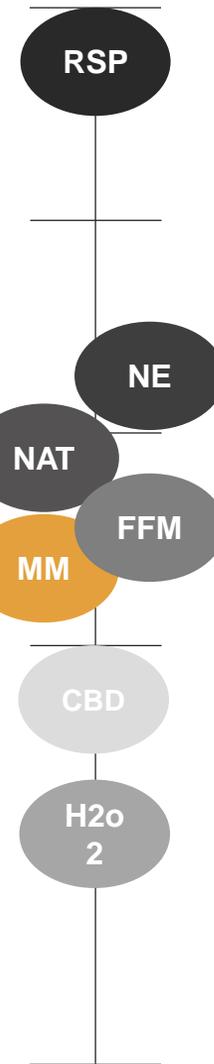
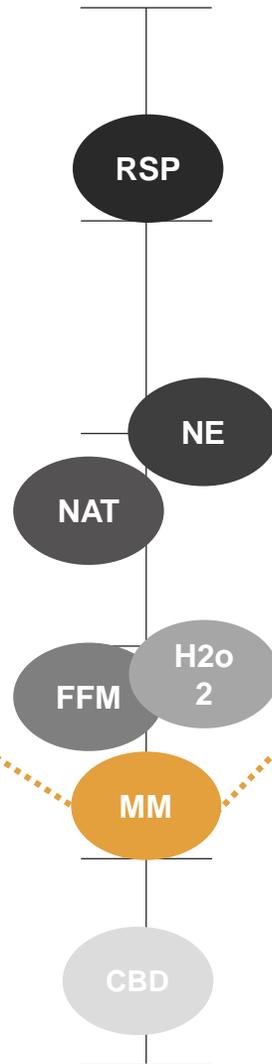
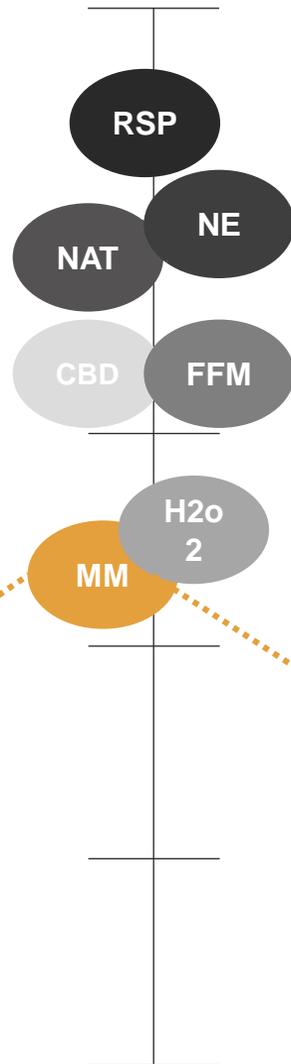
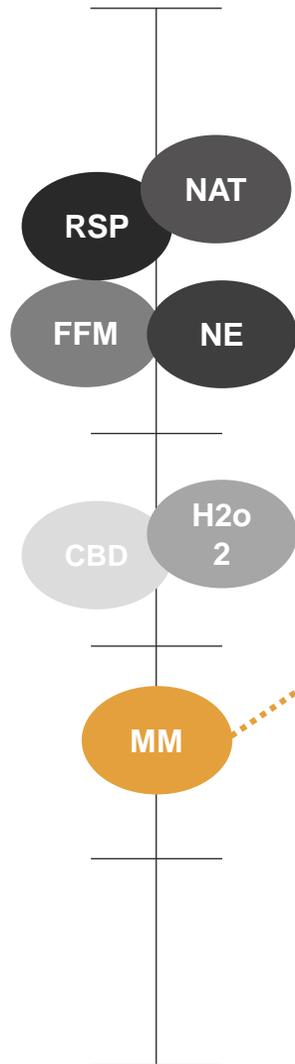


APPLICATION

Solves a Problem

Strongest

Weakest



KEY

-  **RSP**
Responsible Sourcing & Production
-  **NE**
Nature's Energy
-  **NAT**
Non Alcoholic Tipples
-  **FFM**
Fermented for More
-  **H2o 2**
H2O 2.0
-  **MM**
Medical Marvels
-  **CBD**
CBD has come

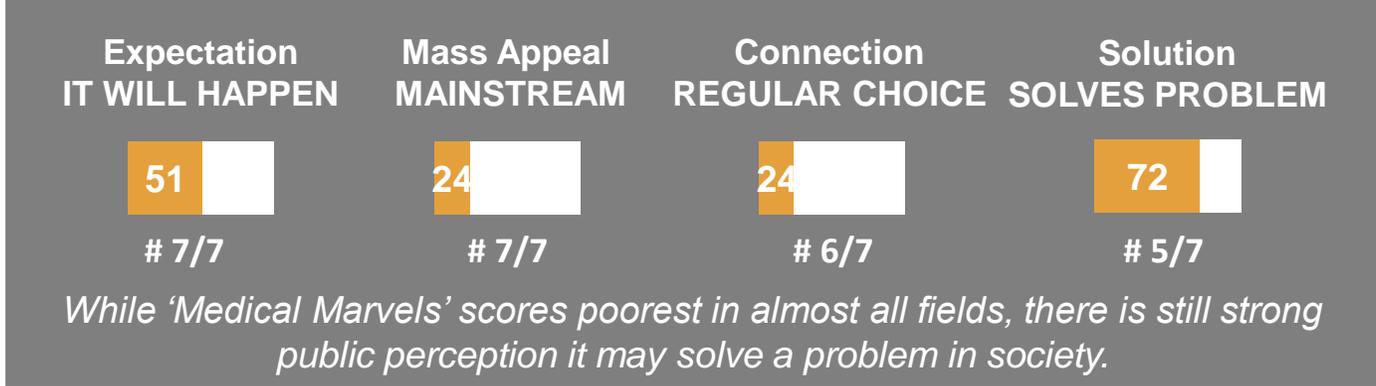
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Backing
This Future



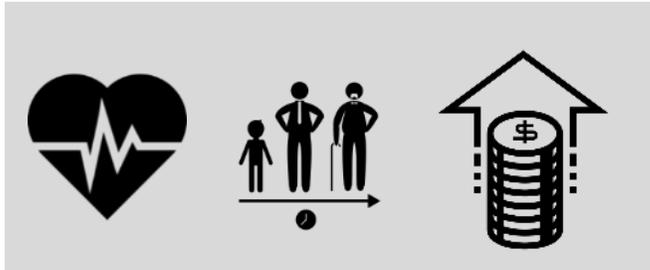
#7

NEEDS FIT...

FIX

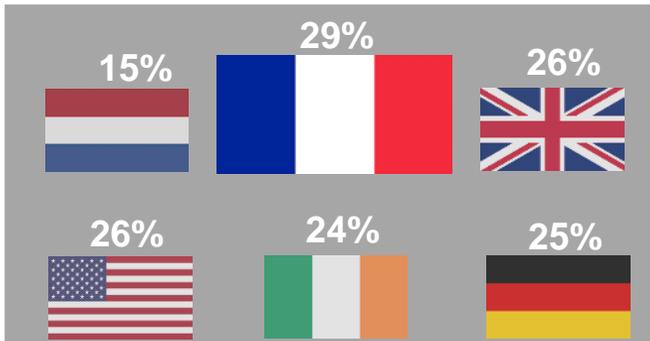
IMMORTALISE

FORCES...

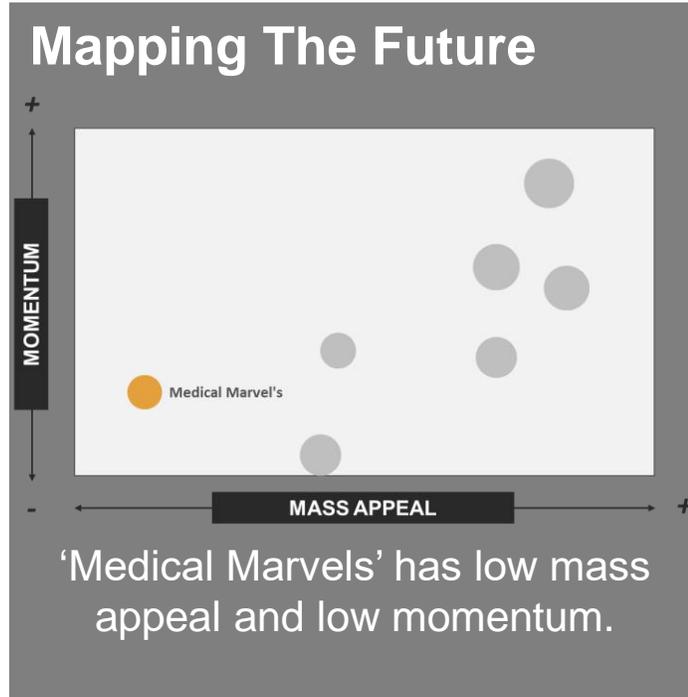


RESONATES WITH...

- Female Oriented
- 30-34 year old
- City / urban area
- Tend to drink drinks with specific Medicinal benefits most often



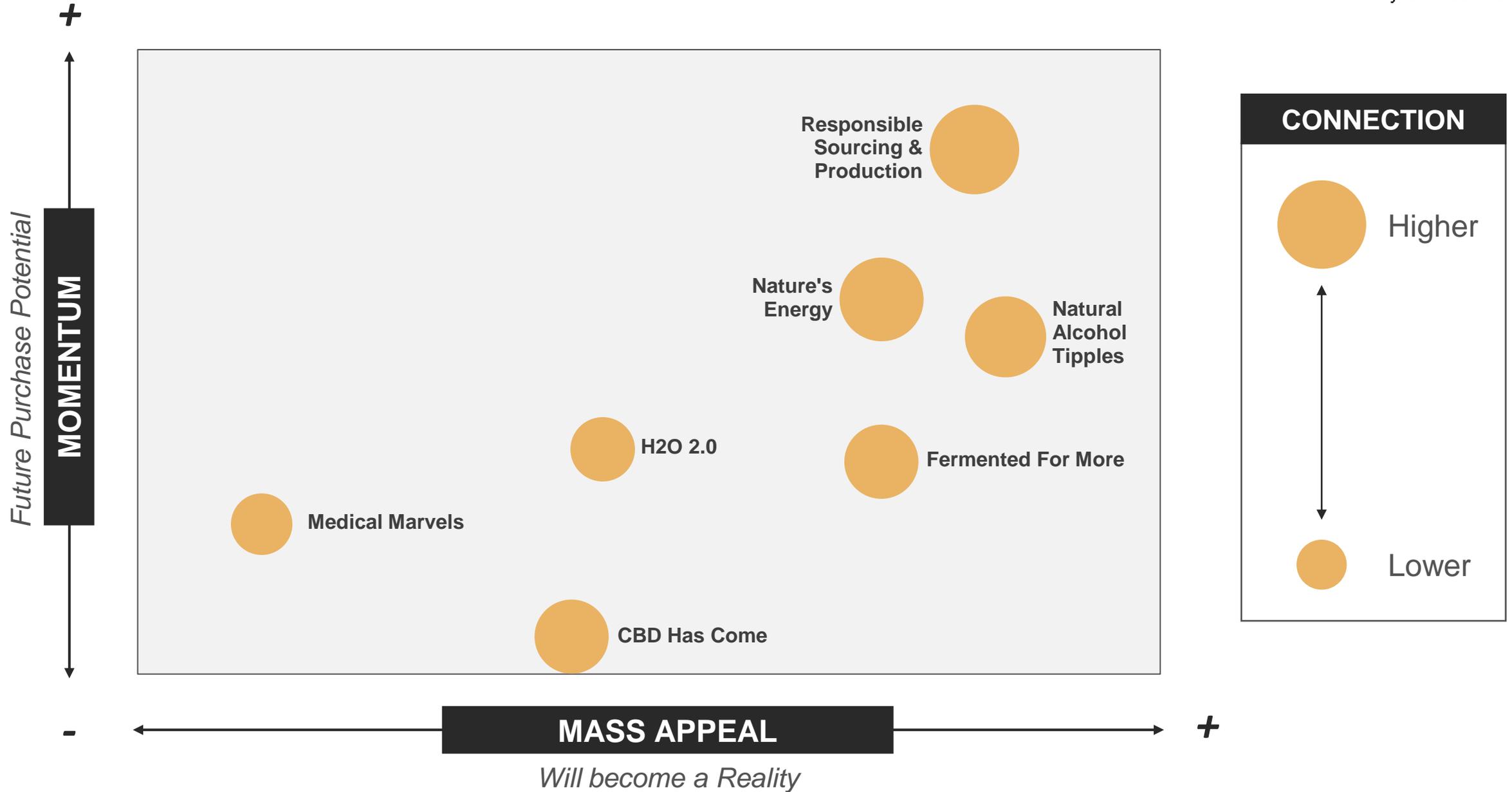
IT SHOWS UP HERE...



AND...

Overall
Preference
7/7

Futures Mapping

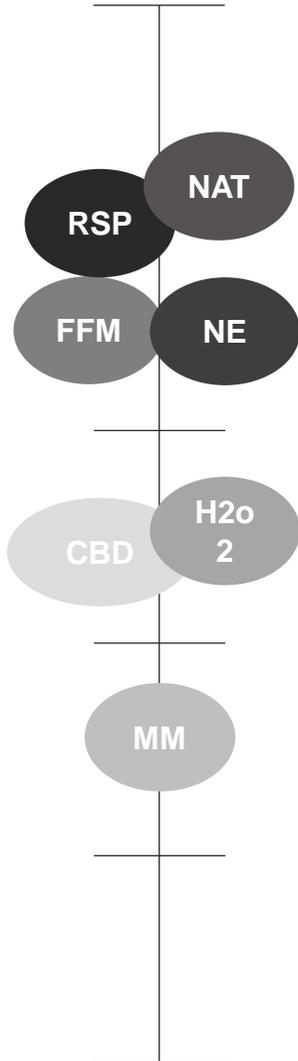




BELIEF

Will become a Reality

Strongest

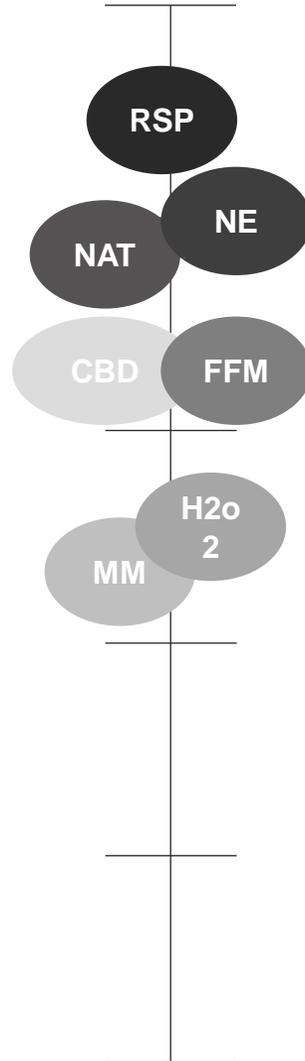


Weakest



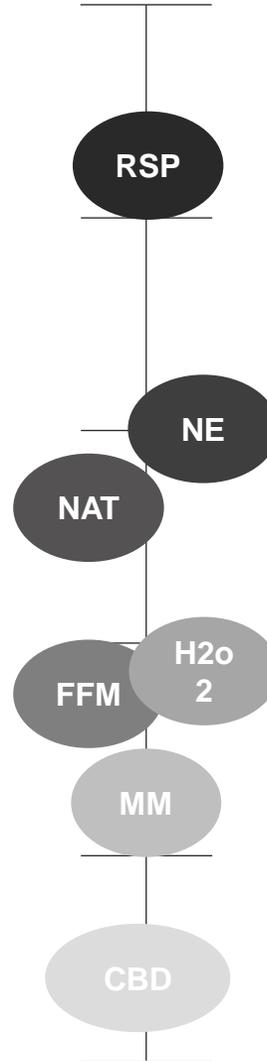
CONNECTION

Future Popularity



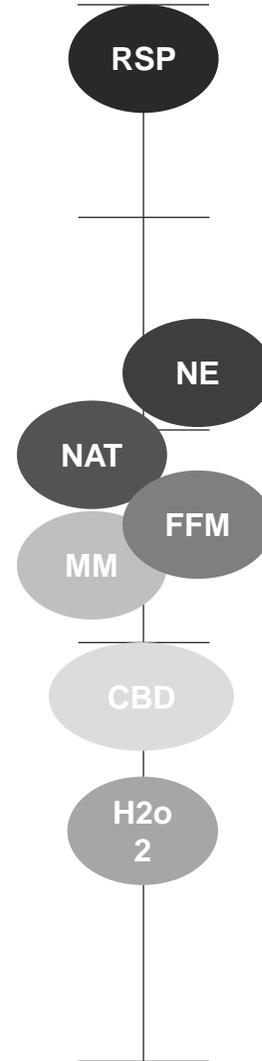
DESIRE

Future Purchase Potential



APPLICATION

Solves a Problem



KEY



SECTION FIVE

Opinions
clarity and confidence

Futures led Innovation
Toolkit

Futures-led Innovation Toolkit

This toolkit is provided to support you in working through this Futures Playbook and to facilitate the capturing of insight and inspiration from this materials.

Following this **8 step innovation journey** will ensure that your solutions are insight-led and connected to consumer needs.

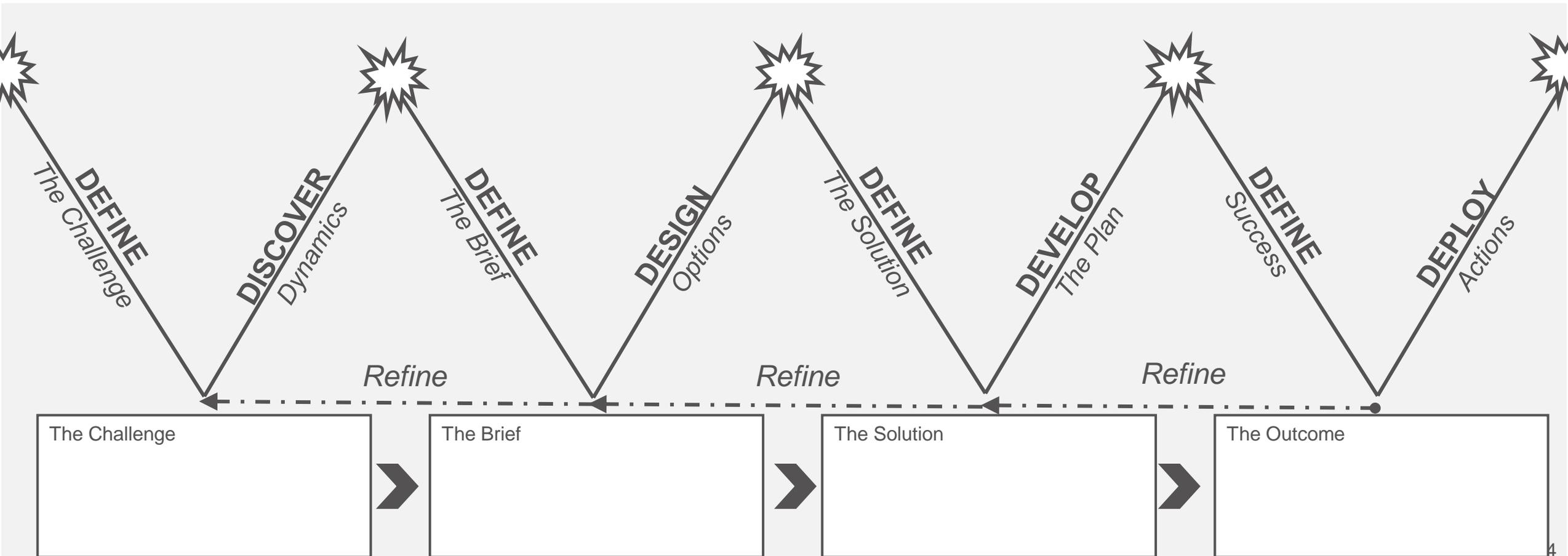
It will also help you to deliver clarity and focus so that you can present your case and proposition more effectively to your commercial partners and stakeholders.

It is designed to be used alone or to help you to facilitate group based innovation.



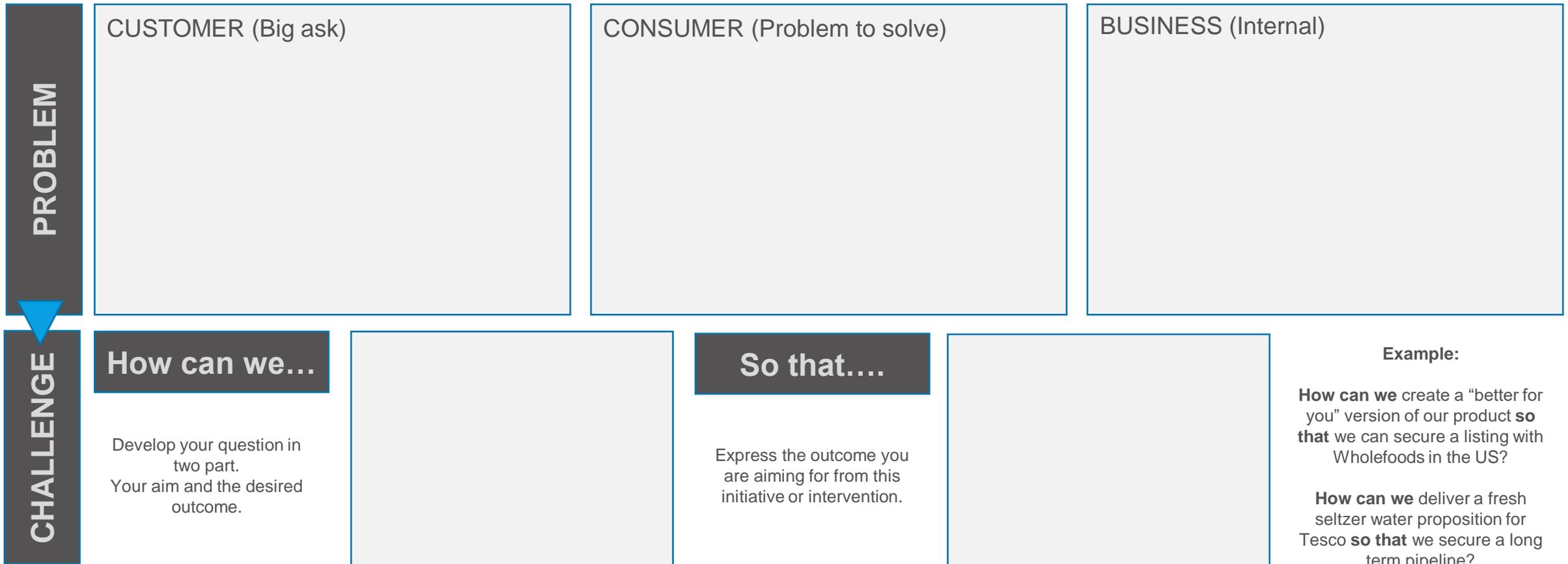
Opinions *Define and Refine Model*

The Define and Refine system outlined below will help you to navigate the Beverage Futures and explore potential opportunities for your business. We have developed this toolkit to help structure your thinking as you work through the process and to ensure that you get the most out of this playbook.



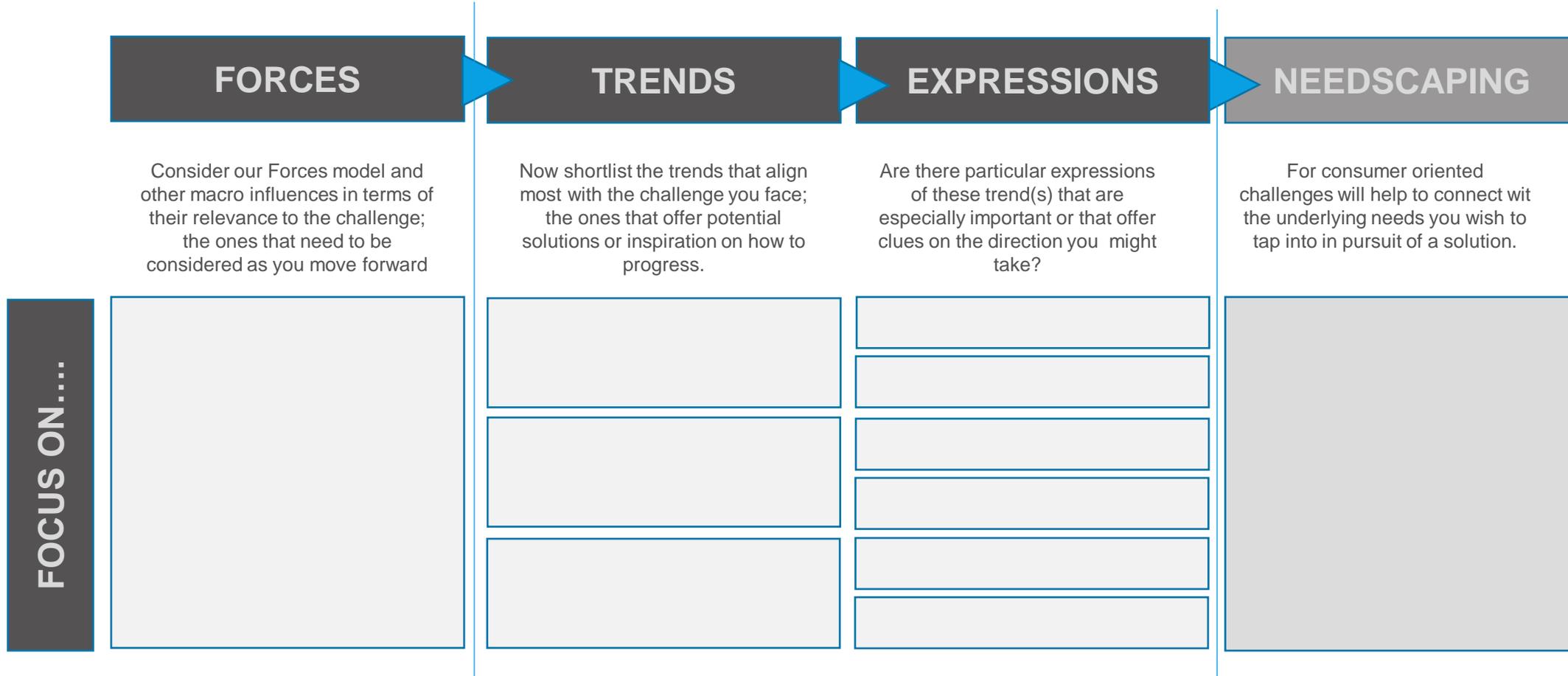
DEFINE *The Challenge*

- In order to develop elegant and relevant solutions to any problem we need to first define what is being asked of us and what we are asking of ourselves. This focus clarity of purpose will help to keep us on track as we progress to the development of solution.
- Think about the challenge presented to us by a customer, a problem we wish to resolve for consumers or an internal business challenge capture it.
- Then turn this into a provocative question to keep you on track, focus your efforts and to get you in problem solving mode.



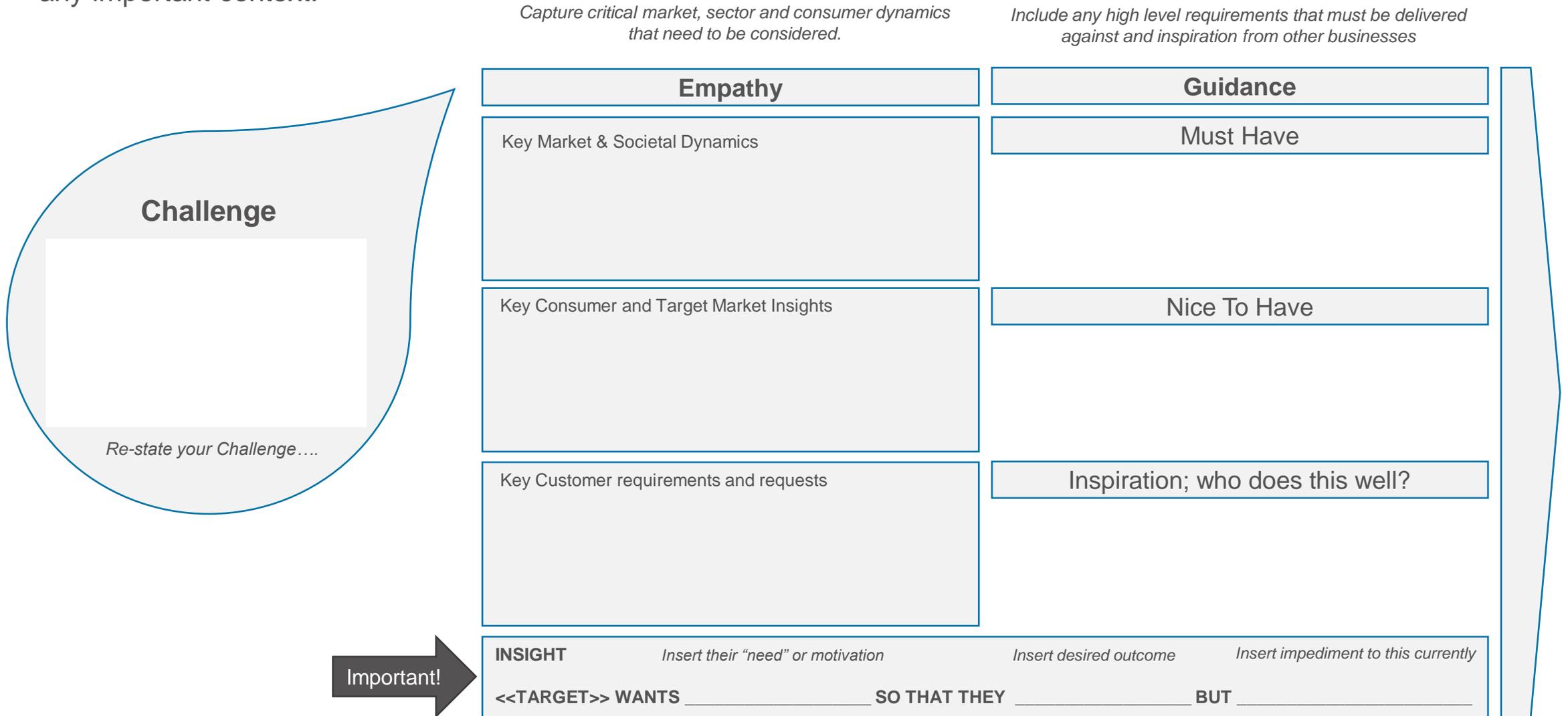
DISCOVER *Dynamics*

- This tool should be used in conjunction with this trends playbook to allow you to consider the various forces that are influencing the market and selecting those that offer the greatest potential for you in light of the challenge you identified.
- This filtering tool will allow you to concentrate your attention on the important market and consumer dynamics; those that will have the greatest impact on your ability to resolve your particular challenge.



DEFINE *The Brief*

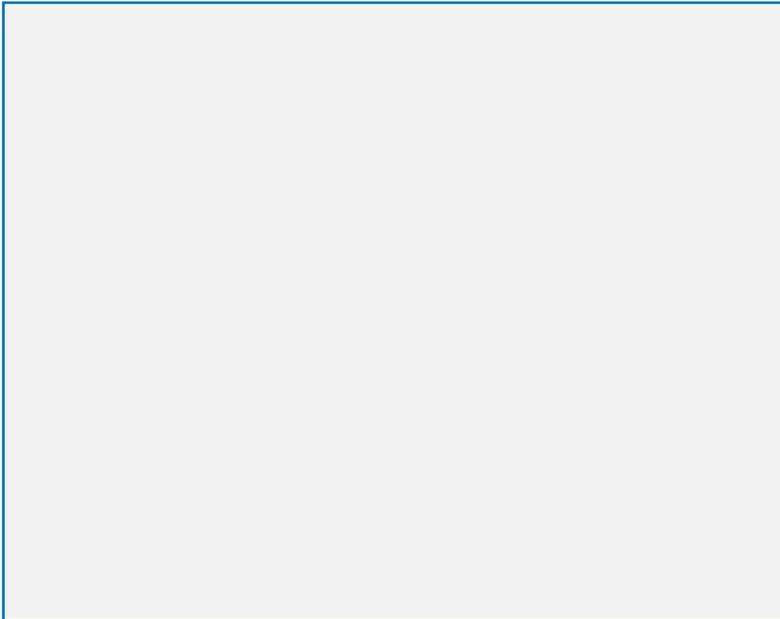
- With your challenge clarified and the most relevant market dynamics and trends identified you can develop your innovation brief to ensure you are progressing in the right direction and that the team are aligned on the ambition and are appraised of any important context.



DESIGN *Options*

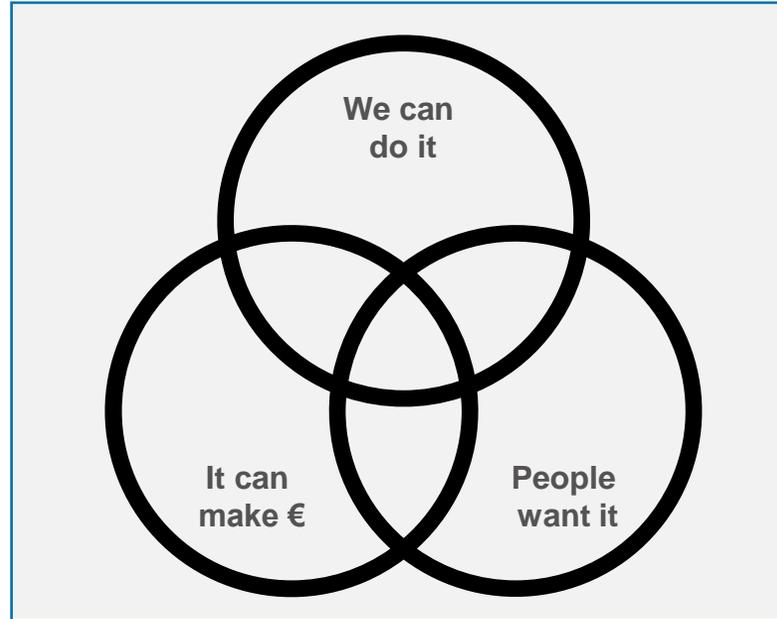
- Quick Fire ideation is a great way of getting lots of embryonic solutions to your challenge from which to develop a final solution..... This is about quantity of ideas as opposed to fully worked solutions.
- Try to keep initial ideas to short 10 word descriptions and get your team working on them with you.

CANVAS



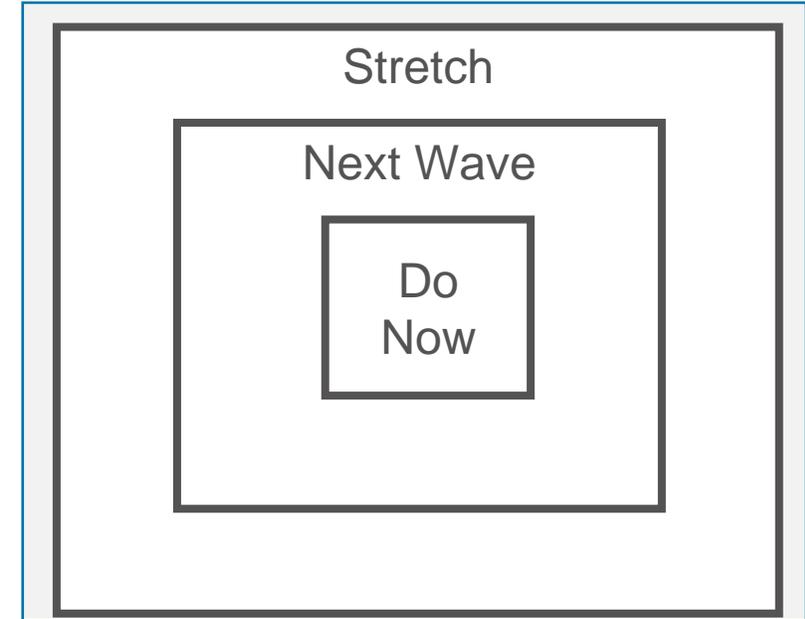
Yes this is a blank page; get a flipchart, some post-its and start thinking...
Try to ideate within thematic areas. For example wellness or premiumisation

FOCALISER



Produce a large Venn diagram like the one above to start to shortlist your ideas.... The ones that seem financially viable, technically feasible and aligned to consumer needs & trends

PIPELINE PLANNER



Let's go further now and choose the one(s) to bring forward. Which ones feel right and provoke passion? Which should we do now? Which should be in the pipeline?

DEFINE *The Solution(s)*

- You may have one or more ideas to progress. This is where you get to bring them to life and think a little more about them. This stage works best in collaboration with others where you can pool your ideas and stress-test assumptions.

COMMIT

What is it? (15 Words or Less)

Why is it great? What problem is it solving?
(15 Words or Less)

Why can we do it better? (10 Words or Less)

THINK ABOUT

As you are developing your idea, try to bring it to life in your mind; how it will look, taste and the job it will do

Format

Formulation

Flavours

Functionality

Free From?

VISUALISE

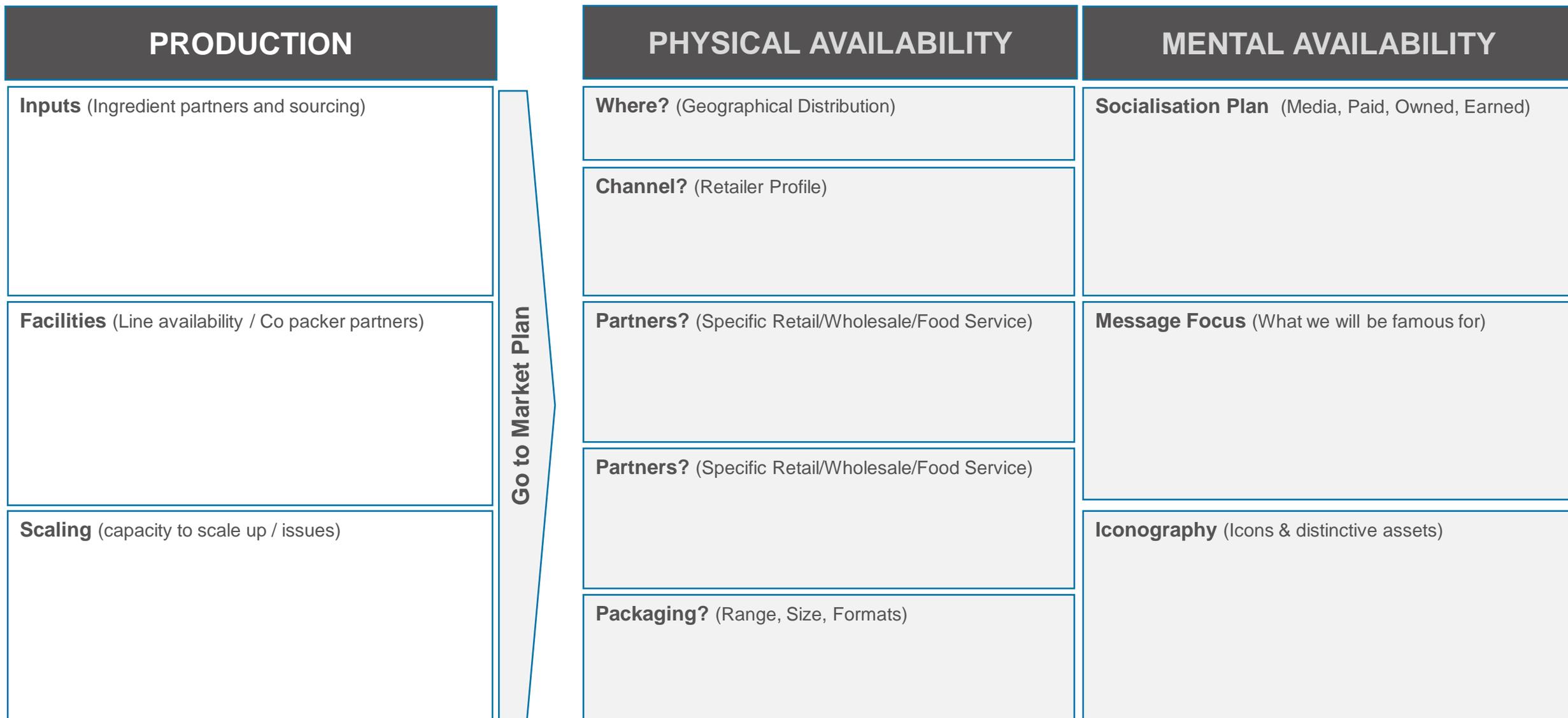
Visualise it (draw pictures, download mood images; anything goes)

RIVALS

Who are the big competitors?

DEVELOP *The Plan*

- Of course there will be lots of detailed planning required to get your product on shelf, but here are a few areas to think about at a high level early in the process; if you hit a blocker step back and refine!



DEFINE *Success*

- There are lots of potential ambitions for your new product or innovation from protecting listings, reigniting interest in an existing product, responding to a PL brief or creating the next big thing. Capture your ambition here and think about how you can evaluate this as you move forward. These are examples with space for your own Key Indicators

	Commercial	Physical Availability	Mental Availability	Others																											
	What are the commercial milestones and requirements for this project	Targets relating to making your product physically accessible to the market and being selected	These are measures of overall brand/product salience, familiarity and appeal.	These are measures of overall brand/product salience, familiarity and appeal.																											
Goals	Revenues <table border="1"> <thead> <tr> <th></th> <th>Minimum</th> <th>On Target</th> </tr> </thead> <tbody> <tr> <td>Yr. 1</td> <td>€</td> <td>€</td> </tr> <tr> <td>Yr. 3</td> <td>€</td> <td>€</td> </tr> </tbody> </table>		Minimum	On Target	Yr. 1	€	€	Yr. 3	€	€	Distribution (stores/%) <table border="1"> <thead> <tr> <th></th> <th>Minimum</th> <th>On Target</th> </tr> </thead> <tbody> <tr> <td>Yr. 1</td> <td></td> <td></td> </tr> <tr> <td>Yr. 3</td> <td></td> <td></td> </tr> </tbody> </table>		Minimum	On Target	Yr. 1			Yr. 3			Awareness (%) <table border="1"> <thead> <tr> <th></th> <th>Minimum</th> <th>On Target</th> </tr> </thead> <tbody> <tr> <td>Yr. 1</td> <td>%</td> <td>%</td> </tr> <tr> <td>Yr. 3</td> <td>%</td> <td>%</td> </tr> </tbody> </table>		Minimum	On Target	Yr. 1	%	%	Yr. 3	%	%	KPI 1
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DEPLOY *Actions*

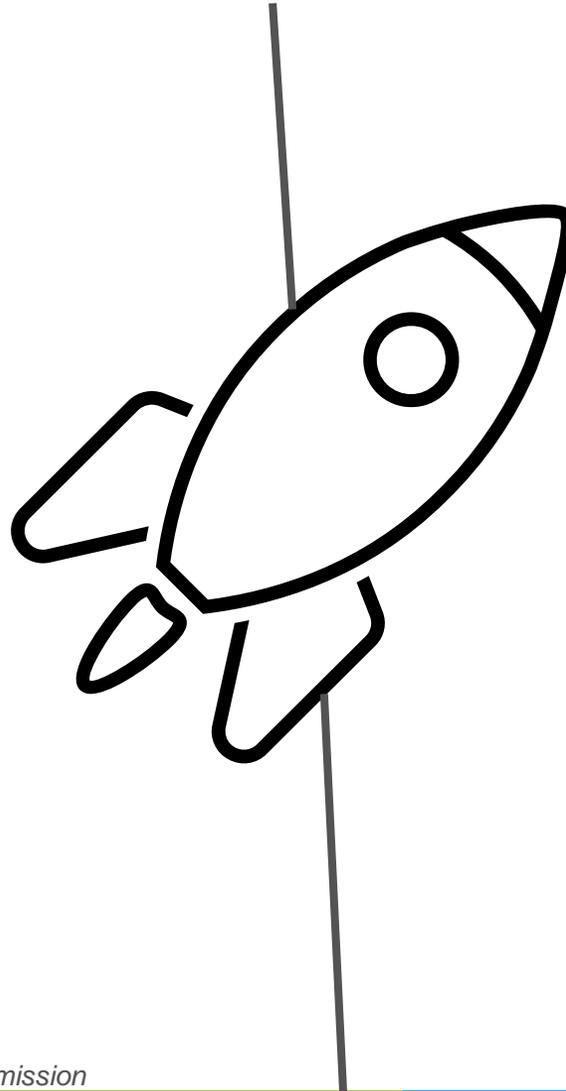
- The hard work is done, lets get down to action and execute our plan. As you mobilise and watch your KPIs for signs of success, be mindful of the helpers and hindrances to your success as you progress with this new product.



Hindrances



Helpers



Opinions
clarity and confidence

Thank You