Soft Drinks Performance

October 2026
Data up to: 03/10/2026

Summary of Content

1. **Retail Market Headlines and Soft Drinks Performance**
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Coca-Cola EUROPACIFIC PARTNERS

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Retail Key Headlines

1. UK consumer confidence improved to -13 in September, with 4 of 5 key measures strengthening as perceptions of personal finances and the wider economy improved. Despite this, shoppers remain cautious and continue to prioritise value when making spending decisions.

2. Shoppers remain value conscious, with retail growth slowing as basket sizes decline, although increased shopping frequency continues to support overall sales.

3. Despite ongoing pressure on household budgets, shoppers continue to choose branded soft drinks, supporting stronger growth versus own label.

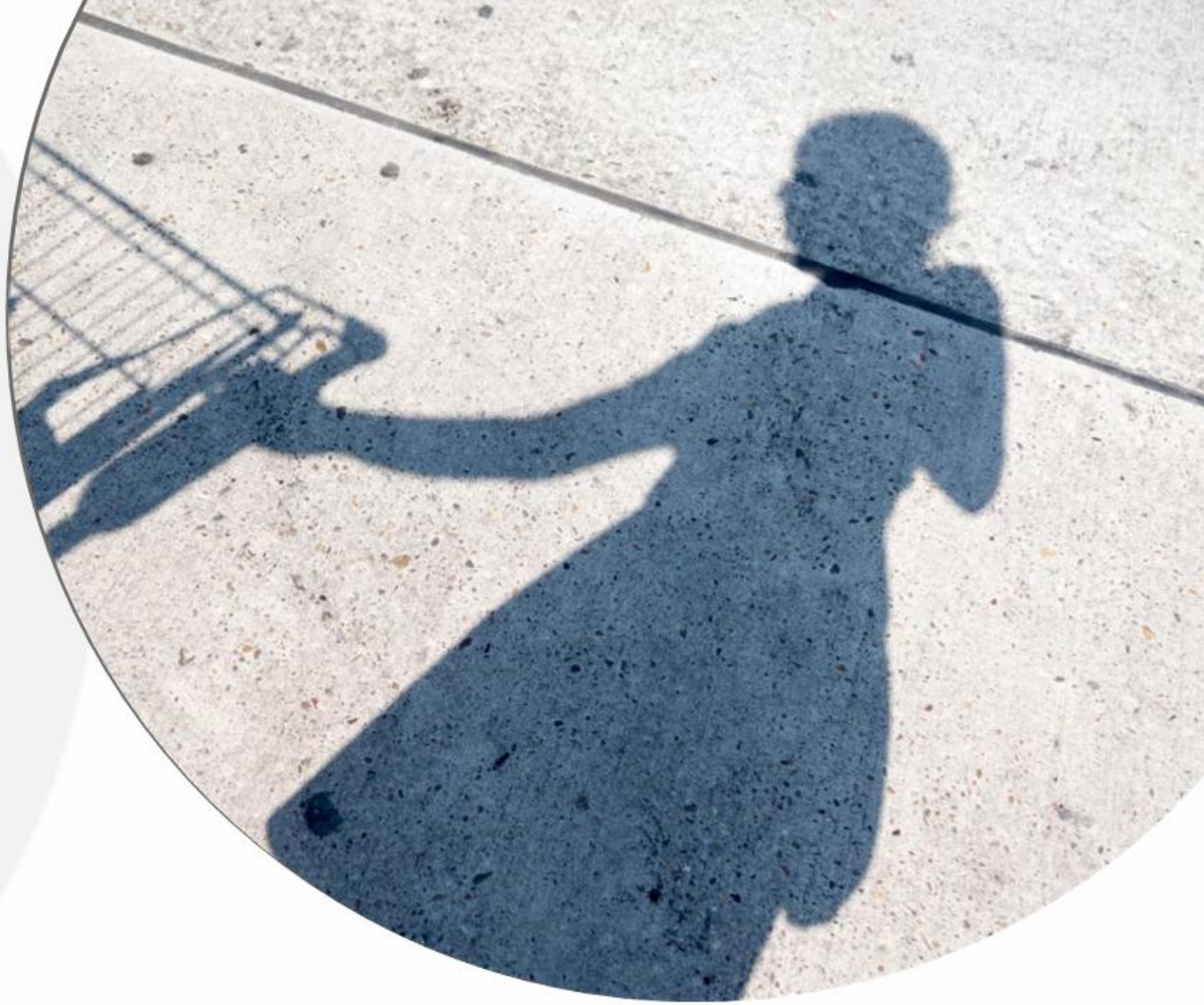
Source: 1 Nielson IQ / GfK Consumer Confidence Barometer, October 2026)

Classification -
Internal

Market Overview

September's grocery basket remains **caught between seasons**, as warmer weather **delayed demand** for **traditional comfort foods**

Unit growth remains fragile at just **+0.2%** supported by shoppers continuing to buy drinks for hydration



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As September became the 4th warmest on record* shoppers moved between seasons



Wk 1: More warm weather

A focus on health and wellbeing

- Value growth slowed to **+1.9%** as sales slowed to **£4.1B**.
- With kids now back at school, shoppers were able to focus on their health and wellbeing as well as restock their pantries.
- **Health & Beauty, Soft Drinks** and **Refreshments** saw the strongest growth, followed by **Ambient Grocery**.
- There was more demand for **Fresh Fruit, Drinks, Ice-cream, Vitamins, Skin and Haircare, as well as Canned Foods, Rice & Grains** and **Pasta.**



Wk 2: Convenient Options

Balancing health and enjoyment

- Value sales have flatlined at **£4.1B** with growth **+2.2%** against weaker comparatives and units just **+0.4%**.
- The top-performing supercategories this week were **Health & Beauty**, **Impulse** and **Frozen** reflecting the lingering warm temperatures.
- There was more demand for Hydration and Convenience Foods with strong growth in Drinks, Fresh Fruit, Yoghurts, Fresh Salad, Ice-cream, Fresh Ready Meals as well as cupboard staples including Canned Veg and Rice & Grains.



Wk 3: Indian Summer

Warmer weather returns

- Despite the warmer weather in parts of the country value sales remained flat at **£4.1B** with growth **1.0%** and units flat **-0%**.
- Impulse was the top-performing supercategory with growth **+5.4%** and units **+2.3%**, followed by Health & Beauty and Frozen.
- **Fresh Fruit, Hydration, Ice-cream, Prepared Salad** and **Sushi**, all saw strong growth as well as some **core pantry categories including Canned Veg, Rice & Grains, Pickles, Canned Fish** and **Dry Pasta** as shoppers **straddled between seasons**.



Wk 4: Start of October

Value sales Improved

- The latest week saw sales reach **£4.2B** and the best growth of the period at **+2.3%** and units **+0.3%**.
- **Christmas ranges are now in store** but with **warm weather still lingering** shoppers are yet to **feel festive**.
- Instead, shoppers are focusing on **hydration** and **refreshments**, **replenishing their pantries**, **autumnal cleaning** and **wellbeing**.

* The Met Office

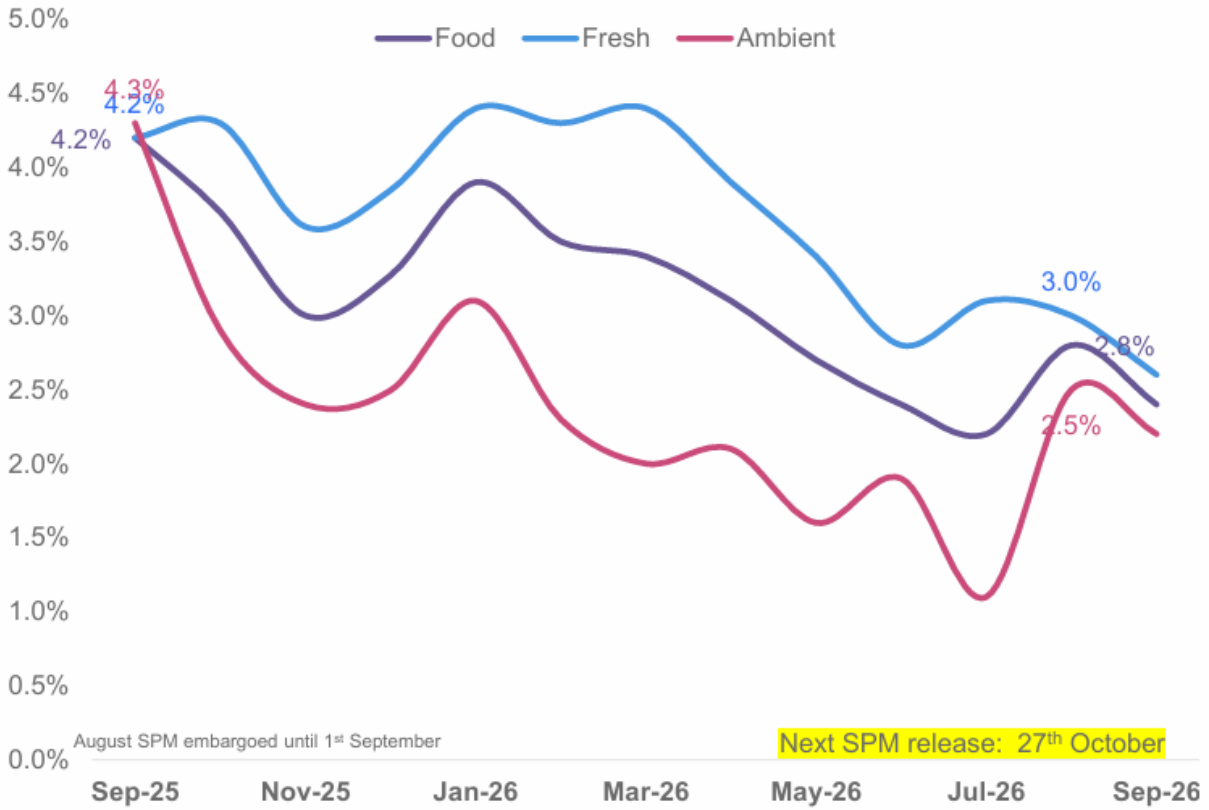
Source: NIQ Scantrack | Total Coverage | Total Store 4 w/e 3rd October 2026

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UK Consumer Confidence continued to recover, with 4 of 5 key metrics improving. However, shoppers remain cautious as major purchase intentions fall and saving increases. Food Shop Price inflation eased in September, aided by promotions.

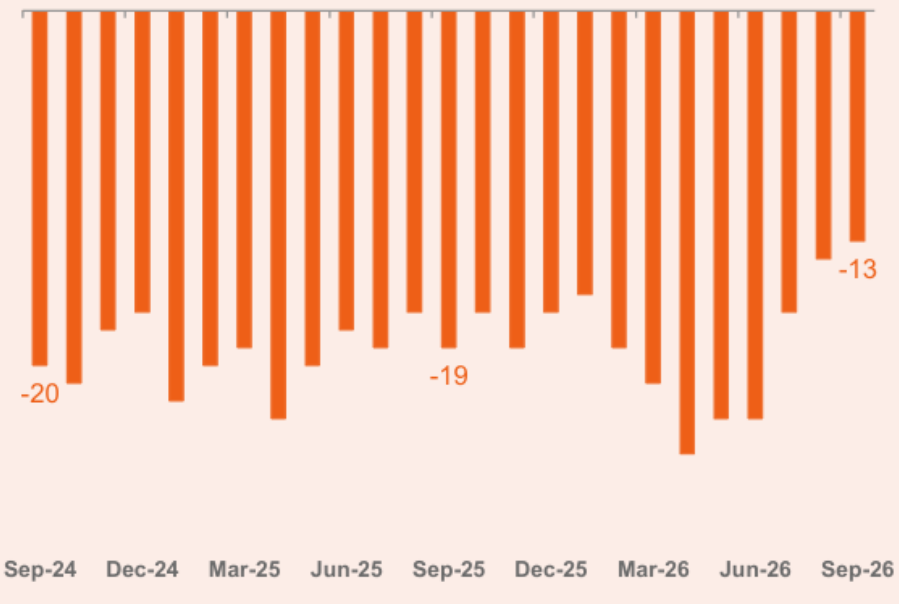
Promotional activity helped to **cool food inflation** in September, **but underlying cost pressures** remain **elevated**. With energy and commodity markets rising, retailers face increasing challenges balancing affordability and margins, suggesting **food inflation may** fluctuate before trending higher.

BRC-NielsenIQ Shop Price Monitor



GfK Consumer confidence

Next CCB release: 23rd October



Personal Financial Situation	-3 (+3)
Personal Financial Situation	+5 (+1)
General Economic Situation	-36 (+4)
General Economic Situation	-22 (+1)
Major Purchase Index	-8 (-1)
Savings Index	+27 (+5)

Q. How has the financial situation of your household changed over the last 12 months/next 12 months? Q. How do you think the general economic situation in this country has changed over the past 12 months/next 12 months?
Q. In view of the general economic situation, do you think now is the right time for people to make major purchases such as furniture or electrical goods? Q. In view of the general economic situation do you think now is a good time to save? (not included in overall Index)
The figures in the brackets are how the score has moved compared with the previous month. So, in the case of 'General Economic Situation over last 12 months' this was -36 in September, increasing by 4 points from -40 in August

Source: GfK Consumer Confidence Barometer powered by NIM

Source left: BRC-NIQ Shop Price Monitor
Source right: GfK Consumer Confidence Barometer powered by NIM

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Value sales continue to slow, as shoppers have fewer reasons to spend

Value Sales £16.6Bn	**+1.8%** vs YA
Unit Sales 7.0Bn	**+0.2%** vs YA
Spend per trip* £18.58	**+0.7%** vs YA
Units per trip* 8.9 items	**-1.4%** vs YA
Frequency* 21.7 trips	**+1.0%** vs YA

Source: NIQ Scantrack | Total Store | Total Coverage, *NIQ Homescan | FMCG | Total Outlets, 4w/e 3rd October 2026

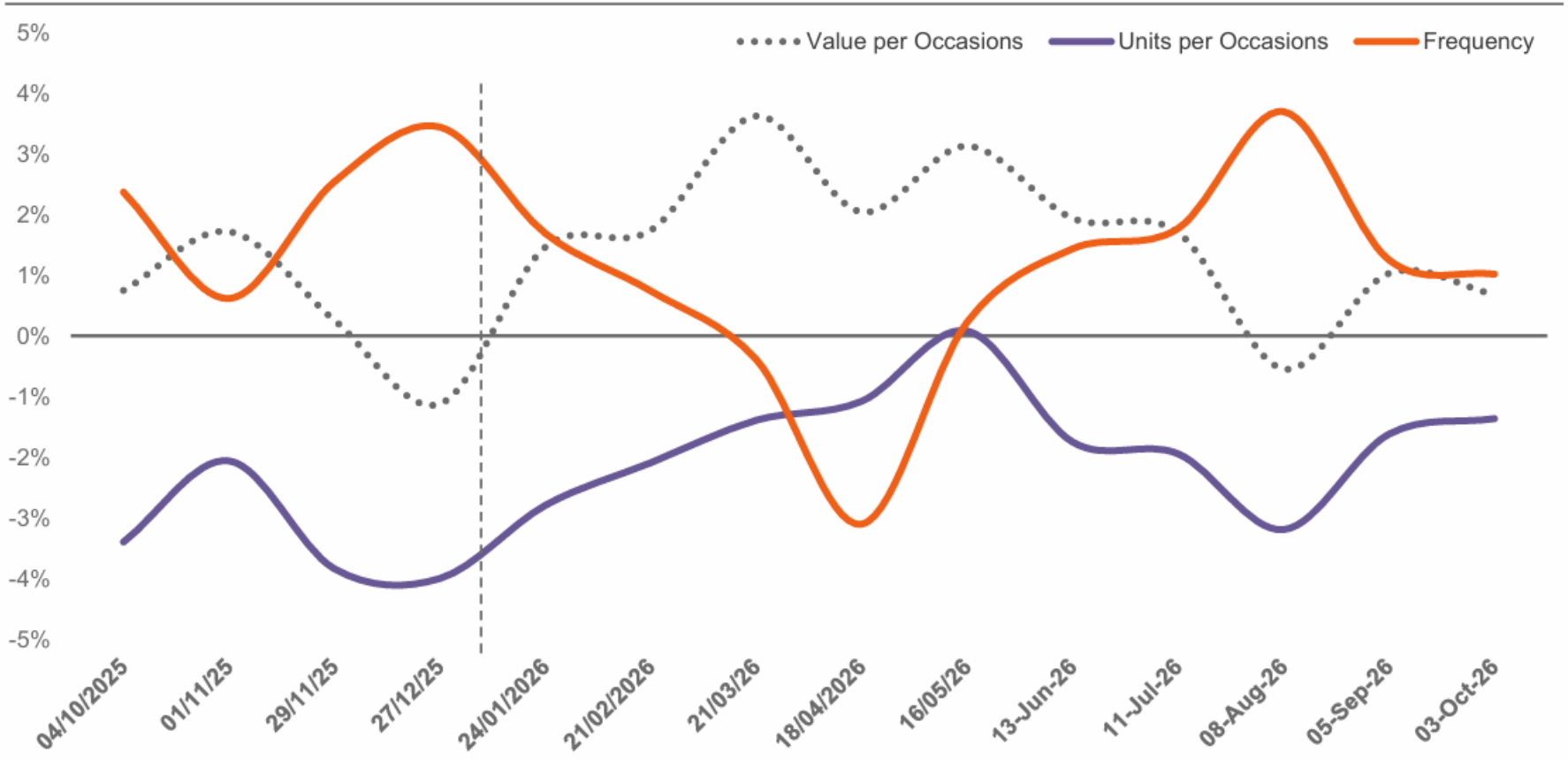
NIQ



Shoppers are still shopping more often than last year, as temperatures in September remained unseasonably high



Core KPI 4 weekly growth vs YA



Source: NIQ Homescan | Total Outlets | FMCG - 4w/e

Easter Day 5th April 2026 vs 20th April 2025

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Category Overview

Shoppers appear to be **oscillating** between **summer** and **autumn** purchasing as the **unusually warm weather** continues to **sustain demand** for **refreshments** while **slowing** the **seasonal shift** into **colder-weather categories**.



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Shoppers caught between seasons as summer sales linger whilst some staples start to recover

Store-cupboard items have begun to **recover,** while **Household** has also improved on last month as the **autumn clean** begins. However, the **warmer weather** has **stalled** the **seasonal shift towards winter comforts**, as shoppers hold off on soups and hot chocolate.

Supercategory performance 4w/e 3rd October2026

	Value (in £B)	Value % chg vs YA	Value % chg vs PP	Unit % chg vs YA	Unit % chg vs PP
Total Store	£16.6B	1.8%	-1.3%	0.2%	0.0%
HBPC & Baby	£1.43	5.6%	-0.1%	0.2%	0.2%
Impulse	£2.37	5.6%	-0.1%	2.0%	0.3%
Frozen	£0.71	3.0%	-6.0%	0.7%	-5.4%
Ambient Grocery	£1.45	2.6%	6.4%	0.2%	8.2%
Fresh Food	£6.25	1.9%	-0.4%	0.4%	-0.4%
Household & Pet	£0.97	1.8%	2.1%	-1.4%	2.1%
BWS	£1.55	-0.6%	-8.3%	-0.3%	-9.0%
General Merchandise	£0.94	-4.2%	-6.6%	-6.8%	-8.9%
Tobacco	£0.90	-4.3%	-4.6%	-7.4%	-3.4%

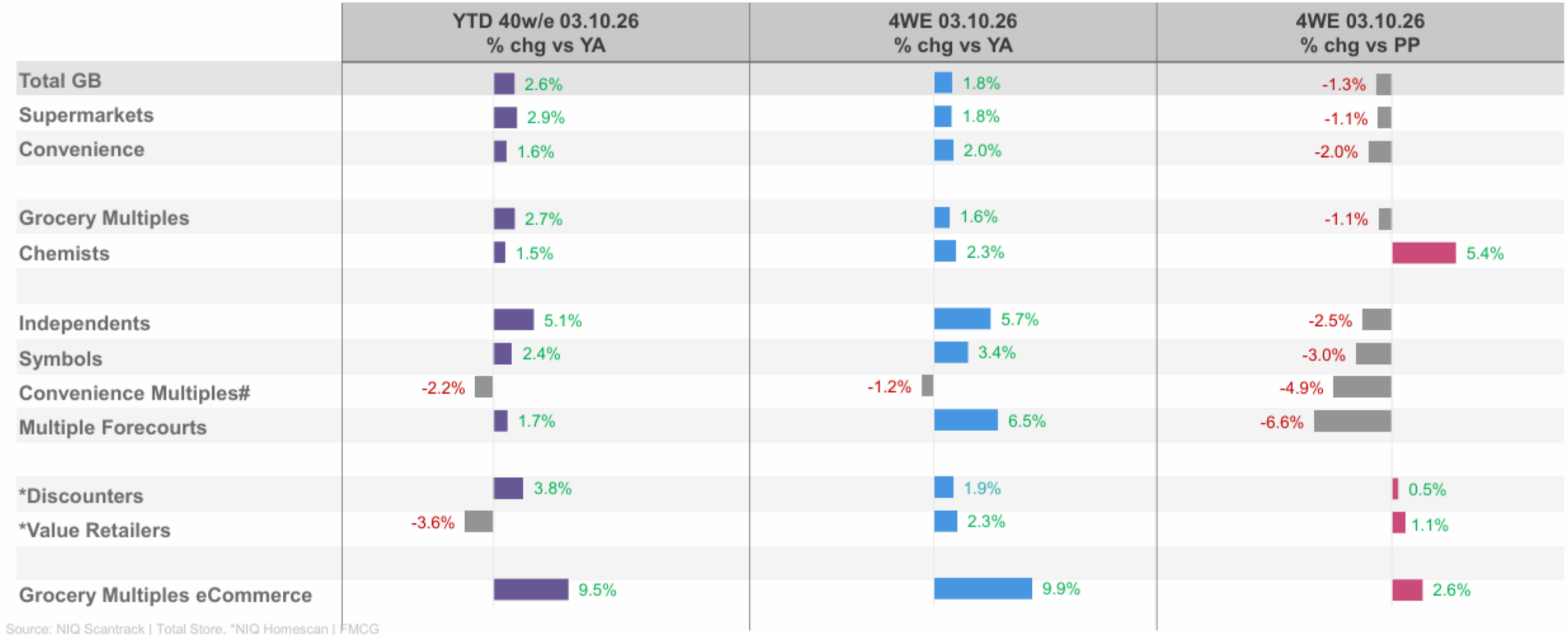
Source: NIQ Scantrack | Total Coverage | Total Store and Supercategories

HBPC = Health, Beauty & Personal Care

Warmer weather continues to support Convenience stores, while Forecourts will be benefiting from motorists filling up more often to help spread the costs of fuel

Compared with the prior period, Chemists also saw an increase as students returned to schools and universities with the warm and humid conditions leading to a spread in respiratory viruses. Value Retailers returned to growth ahead of Halloween as shoppers look for savings

Total Store Channel % chg



Source: NIQ Scantrack | Total Store, *NIQ Homescan | FMCG
Nb. Supermarkets include Dark Stores and Pick stores

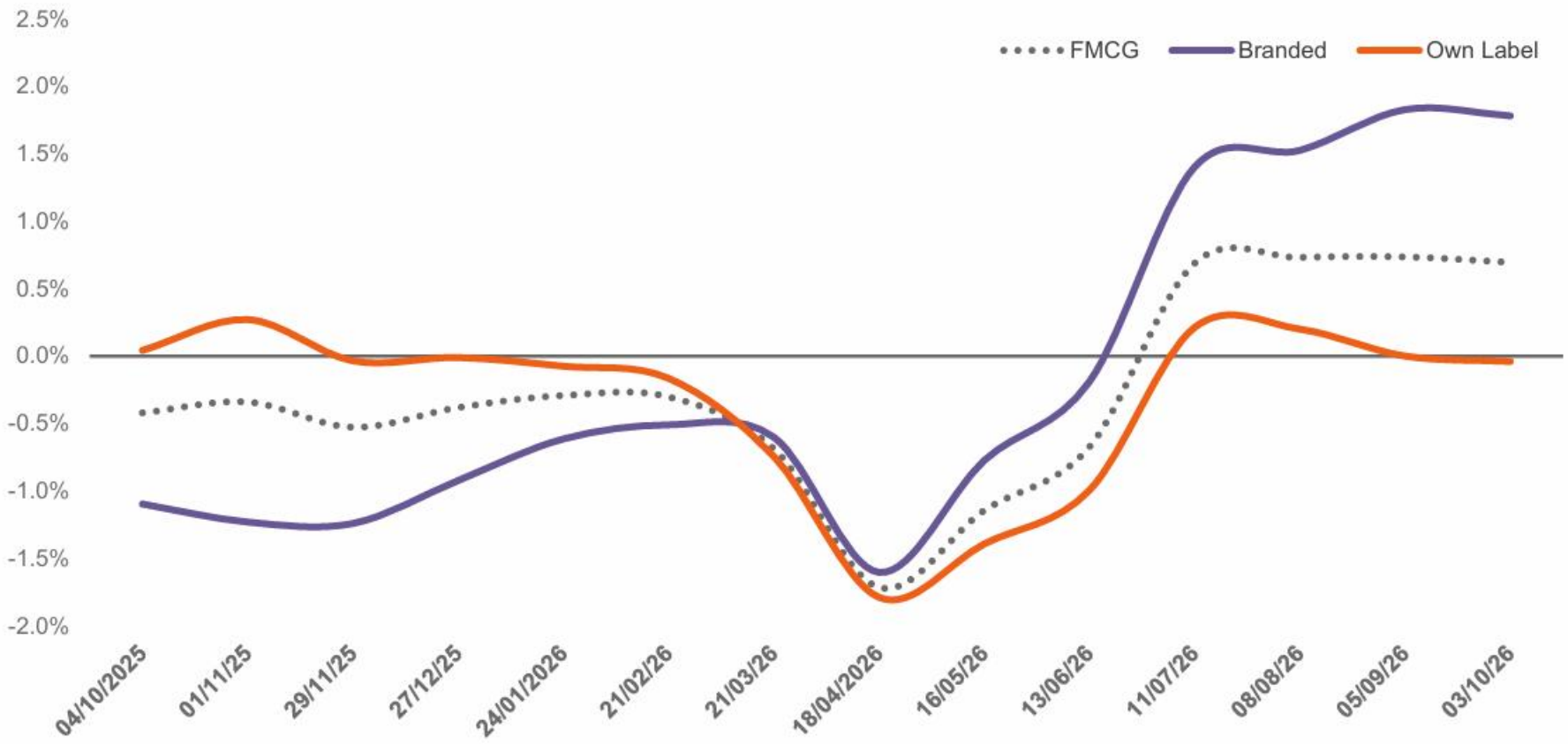
PP = Prior Period, #includes Off Licences

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Brands have now outperformed own label since Easter, supported by continued demand for refreshments and with over a third of branded sales being purchased on promotion



Branded and Own Label 12w/e % Unit chg vs YA



Source: NIQ Homescan | Total Outlets | FMCG - Branded vs Own Label | Rolling 12 weekly

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Branded growth continues to benefit from elevated demand for ‘on-the-go’ refreshments, whilst own label growth has been held back by the delayed transition to autumn

12w/e performance by category % unit chg vs YA



Source: NIQ Homescan | Total Outlets | FMCG - Branded vs Own Label | Rolling 12 weeks ending 3rd October 2026

~Health Beauty & Personal Care & Baby; # includes Biscuits; * includes Nuts

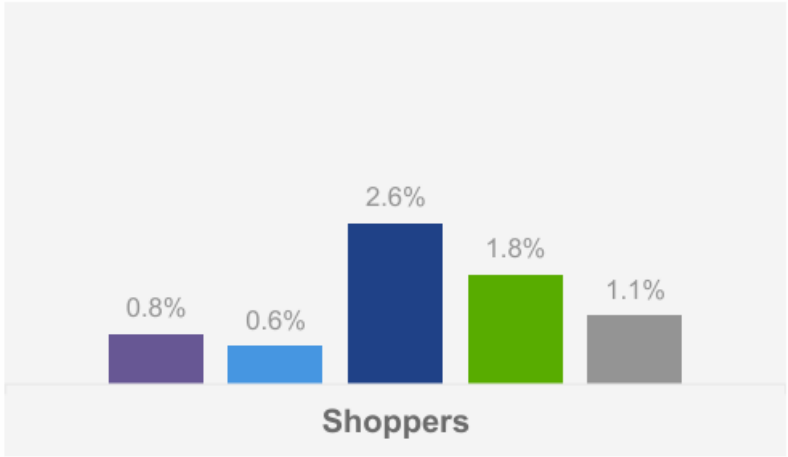
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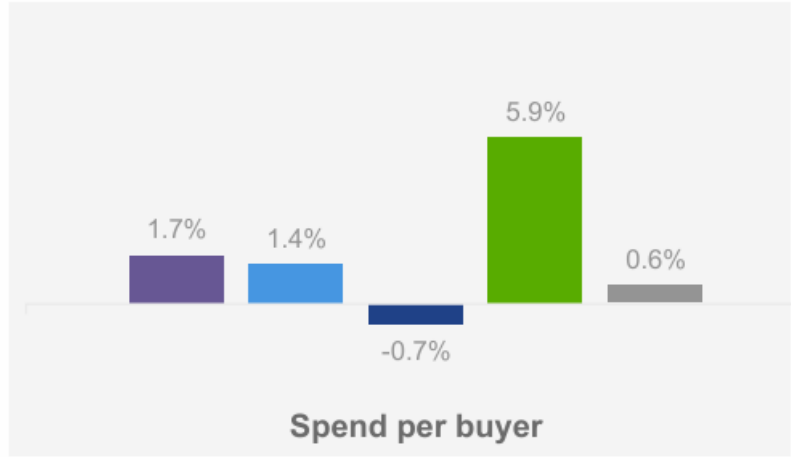
Shoppers are becoming more promiscuous

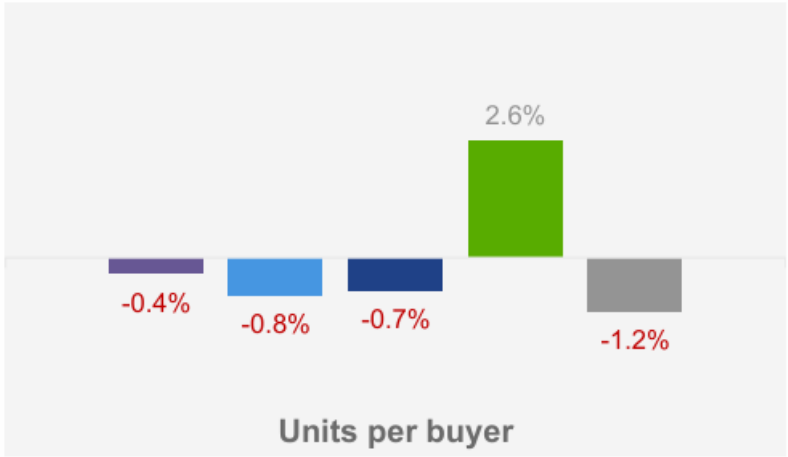
As shoppers **buy less overall**, they are becoming **more deliberate** about **how** they spend, **seeking savings** while **only trading up where** they **perceive genuine value**.

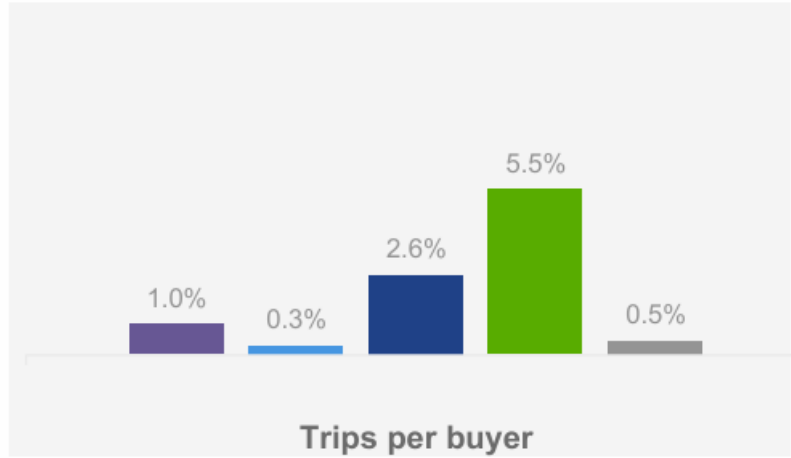
Online is **proving adaptable** and **convenient**, helping shoppers **manage baskets** and **find** the **products** that **best meet** their **needs**, all from the comfort of their homes.

FMCG shopper metrics by channel | 4WE 03.10.26 % chg vs YA









GB G Mults Discounters Online Instore

Source: *NIQ Homescan | FMCG

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Shoppers may enter Q4 with greater focus on health and sustainability, as well as affordability

Household budgets are again being squeezed by **fuel prices**, currently at a 4 year high, alongside **higher energy bills**, while retailers are working hard to **absorb** the **impact** and **limit** price increases



Shopper focus shifts to Autumn

- After the hot summer, shoppers are expected to **rein in spend** after the indulgencies of the holiday season.
- The weather is turning cooler, which marks a change in lifestyle, **warmer clothing**, **indoor living** and **comfort foods**.
- Summer of 2026 may have triggered an **'eco-awakening'** among more shoppers which may lead to more **active engagement** with **sustainability** and buying local.



Health is reshaping food choices

- NIQ Survey* data shows **GLP-1** use has **reached 12%** of households with healthier eating habits increasingly influencing the wider household.
- **93%** of shoppers claim **'avoiding ultra processed food** is **at least somewhat important'** and more shoppers are **cooking from scratch**, choosing **natural ingredients** and **scrutinising food labels**.
- Retailers are expanding healthier choices and this bodes well for **Organic September** which is being supported by retailer investment including M&S, Waitrose, Ocado and Tesco.



Online remains strong into September

- **Summer 2026**, marked a **turning point for Online**, defying its usual slowdown.
- The shift towards smaller, **needs-based missions** is reducing reliance on trolley shops and **online** is **adapting**.
- Rapid delivery proved its value during the World Cup, capturing **treat-led** and **emergency missions.**
- **Online** enters autumn with strong momentum and **potential** for **new share highs**.
- **However**, budget pressures may temper these priorities, **increasing price sensitivity** and prompting greater **promotional intensity**.

Source: GfK Consumer Confidence Barometer powered by NIM | Total Outlets | FMCG | BRC-NIQ Shop Price Monitor |*Homescan Survey June 2026

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The warmer weather continues to stimulate sales in Soft Drinks whilst Health & Beauty benefits from more focus on wellbeing

Packaged Grocery and **Confectionery** remain challenged not helped by the warm weather.

Value sales growth by supercategory

GB Total Coverage Value Sales Growth	y/e 3Oct26	12w/e 3Oct26	4w/e 4Oct25	4w/e 13Jun26	4w/e 11Jul26	4w/e 8Aug26	4w/e 5Sep26	4w/e 3Oct26
Bakery	2.4%	0.5%	4.1%	2.3%	1.9%	0.7%	0.5%	0.2%
BWS	0.4%	0.5%	-0.5%	3.5%	5.0%	2.3%	-0.4%	-0.6%
Confectionery	3.5%	0.2%	5.0%	-1.9%	4.8%	-2.4%	2.1%	0.8%
Convenience & Deli	3.3%	2.7%	4.6%	4.5%	4.7%	4.5%	1.5%	2.1%
Crisps & Snacks	3.0%	2.3%	1.5%	4.4%	6.2%	3.2%	1.3%	2.4%
Dairy	4.7%	2.8%	8.1%	3.2%	3.2%	3.3%	2.9%	2.2%
Frozen	3.7%	5.1%	3.2%	10.0%	7.0%	8.8%	3.3%	3.0%
Health Beauty Toiletries & Baby	4.5%	5.7%	3.6%	5.4%	4.8%	6.5%	4.9%	5.6%
Household	0.5%	1.6%	-0.3%	1.6%	1.2%	1.1%	1.8%	1.8%
Meat Fish & Poultry	4.8%	1.1%	8.9%	4.4%	2.7%	2.0%	0.4%	0.8%
General Merchandise	-0.4%	-0.6%	-1.7%	3.7%	4.6%	1.7%	0.6%	-4.2%
Packaged Grocery	2.9%	1.3%	3.7%	0.8%	1.6%	-0.6%	2.7%	1.9%
Pet	1.7%	1.6%	1.6%	0.5%	1.5%	0.4%	2.6%	1.9%
Produce	4.1%	3.9%	5.3%	5.4%	4.5%	5.5%	3.1%	3.2%
Soft Drinks	7.9%	13.2%	6.6%	12.3%	10.6%	16.4%	10.2%	12.9%
Tobacco	-7.0%	-4.8%	-8.4%	-4.3%	-4.6%	-4.0%	-6.0%	-4.3%
Total Store Read	**2.6%**	**2.4%**	**3.0%**	**3.7%**	**3.8%**	**3.4%**	**2.0%**	**1.8%**
TSR excluding General Merchandise & Tobacco	**3.5%**	**3.1%**	**4.2%**	**4.2%**	**4.4%**	**4.0%**	**2.6%**	**2.7%**

Source: NIQ Scantrack GB Total Coverage

Nb: Packaged Grocery includes Biscuits

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Unit growth remains fragile, supported by the prolonged demand for hydration

Excluding Soft Drinks, unit growth would have been **negative** in the latest two 4-weekly reporting periods (at -0.3% and -0.2% respectively).

As temperatures cool and hydration demand moderates, **achieving positive unit growth for 2026** will become **increasingly challenging**.

Unit sales growth by supercategory

GB Total Coverage Unit Sales Growth	y/e 3Oct26	12w/e 3Oct26	4w/e 4Oct25	4w/e 13Jun26	4w/e 11Jul26	4w/e 8Aug26	4w/e 5Sep26	4w/e 3Oct26
Bakery	-1.2%	-1.9%	-0.9%	-0.4%	-1.1%	-1.7%	-2.2%	-2.0%
BWS	-0.2%	0.7%	-2.4%	4.6%	5.0%	3.2%	-0.9%	-0.3%
Confectionery	-0.7%	-0.6%	-2.8%	-3.4%	0.4%	-3.5%	0.5%	1.1%
Convenience & Deli	-0.2%	0.7%	-0.1%	2.0%	2.0%	2.4%	-0.4%	0.1%
Crisps & Snacks	-0.2%	-0.3%	-2.3%	2.0%	4.1%	0.9%	-1.4%	-0.4%
Dairy	1.8%	1.9%	1.7%	1.7%	1.7%	1.9%	2.0%	2.0%
Frozen	0.6%	2.5%	0.0%	6.2%	4.6%	6.1%	0.4%	0.7%
Health Beauty Toiletries & Baby	-0.2%	0.2%	-0.8%	-0.5%	-0.2%	0.9%	-0.5%	0.2%
Household	-0.9%	-1.3%	-0.8%	-1.4%	-2.2%	-1.9%	-1.2%	-0.9%
Meat Fish & Poultry	0.7%	0.3%	0.8%	2.3%	1.3%	1.4%	-0.3%	-0.1%
General Merchandise	-3.2%	-4.3%	-1.5%	-3.2%	1.8%	-1.4%	-4.9%	-6.8%
Packaged Grocery	-0.3%	-1.0%	0.3%	-2.1%	-1.4%	-3.2%	0.3%	-0.2%
Pet	-1.9%	-2.5%	-1.0%	-3.8%	-2.5%	-3.6%	-1.4%	-2.5%
Produce	0.9%	1.1%	1.3%	1.7%	1.3%	2.4%	0.4%	0.5%
Soft Drinks	1.4%	6.3%	0.6%	6.2%	4.4%	9.9%	3.1%	5.8%
Tobacco	-10.6%	-7.6%	-14.9%	-6.3%	-6.6%	-6.7%	-8.8%	-7.4%
Total Store Read	**0.0%**	**0.4%**	**-0.2%**	**0.9%**	**1.2%**	**1.1%**	**0.0%**	**0.2%**
TSR excluding General Merchandise & Tobacco	**0.2%**	**0.7%**	**0.0%**	**1.1%**	**1.3%**	**1.3%**	**0.3%**	**0.6%**

Source: NIQ Scantrack GB Total Coverage

Nb: Packaged Grocery includes Biscuits

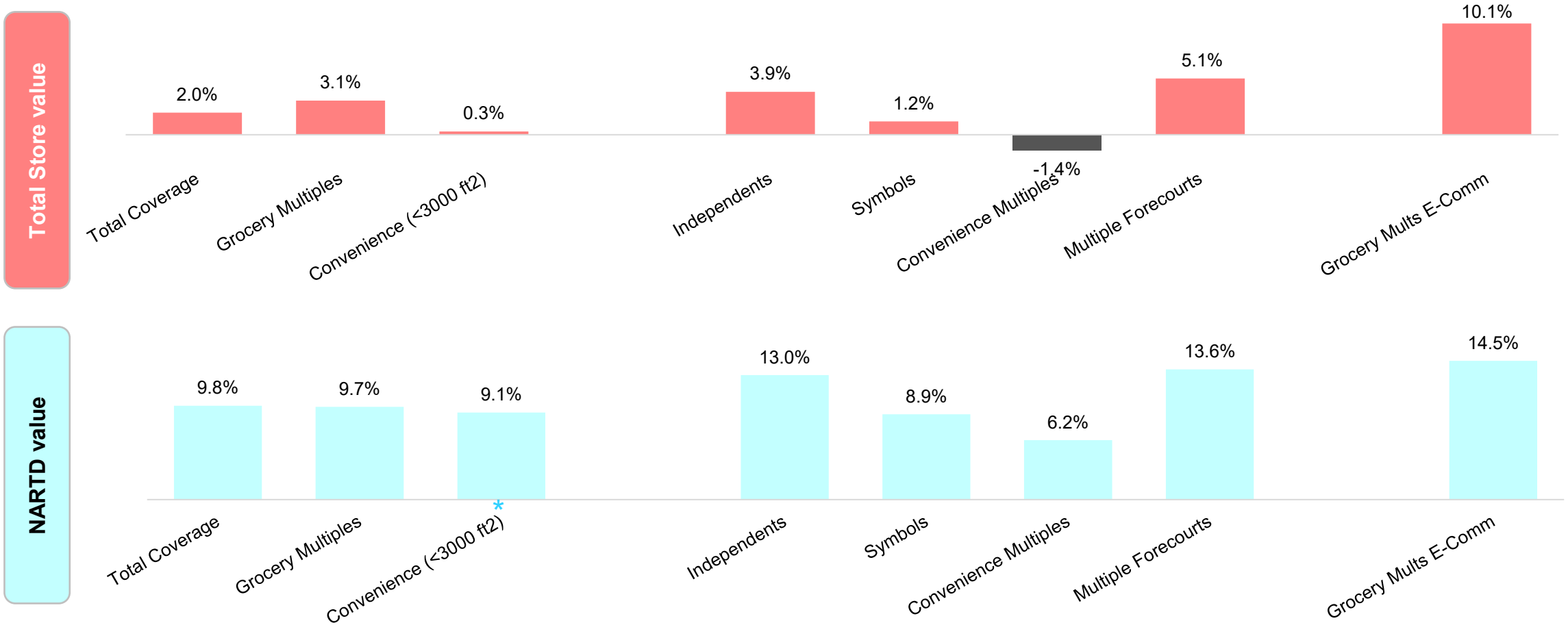
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Sept 2026:

Multiple Forecourts and eCommerce saw the strongest growth during the final weeks of summer, benefiting from domestic travel and staycationed missions, alongside the continued appeal of home delivery

Total Store Channel and NARTD value growth

4w/e 5th Sept 2026



Nb. Supermarkets include Dark Stores and Pick stores

Source: NIQ Scantrack Total Store Read , *Homescan FMCG

* *'Combined Convenience' = Grocery Convenience + Total Impulse*

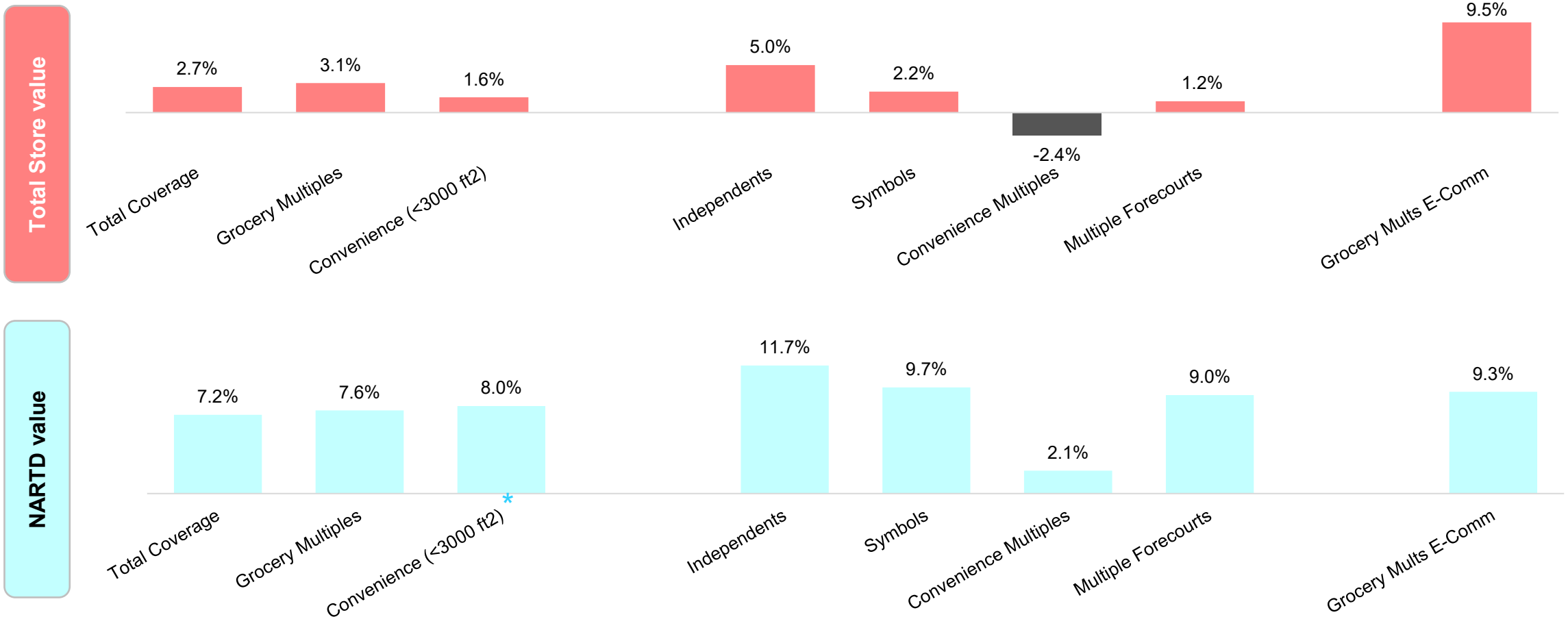
Classification - Internal

YTD 2026:

The hot summer has helped to push small stores back into YTD Growth, whilst e-Com leads overall

Total Store Channel and NARTD value growth

YTD 5th Sept 2026



Nb. Supermarkets include Dark Stores and Pick stores

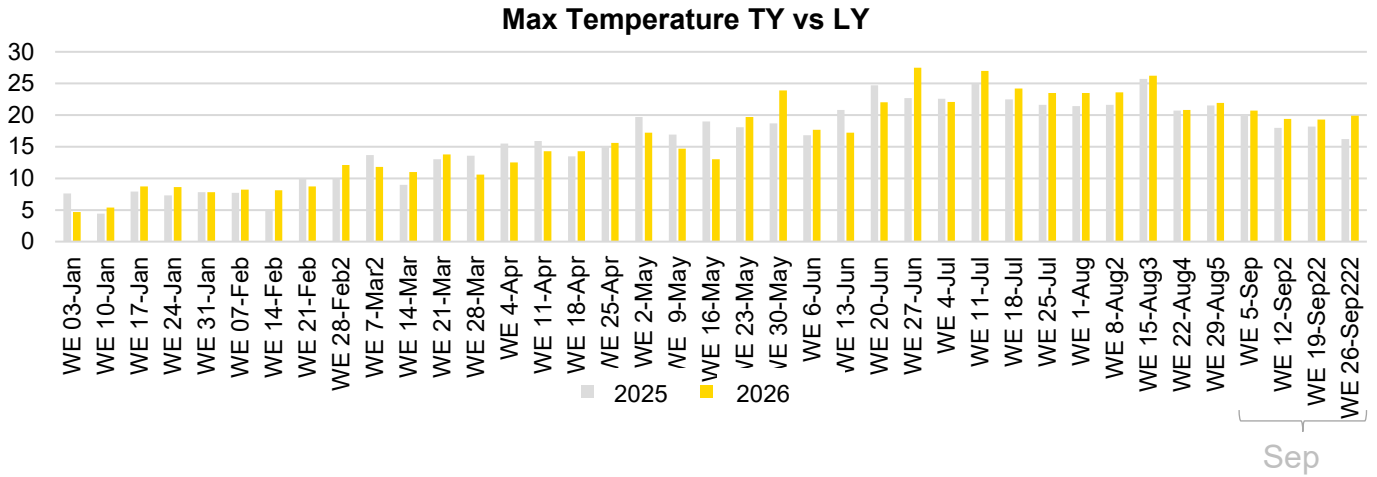
Source: NIQ Scantrack Total Store Read , *Homescan FMCG

* *'Combined Convenience' = Grocery Convenience + Total Impulse*

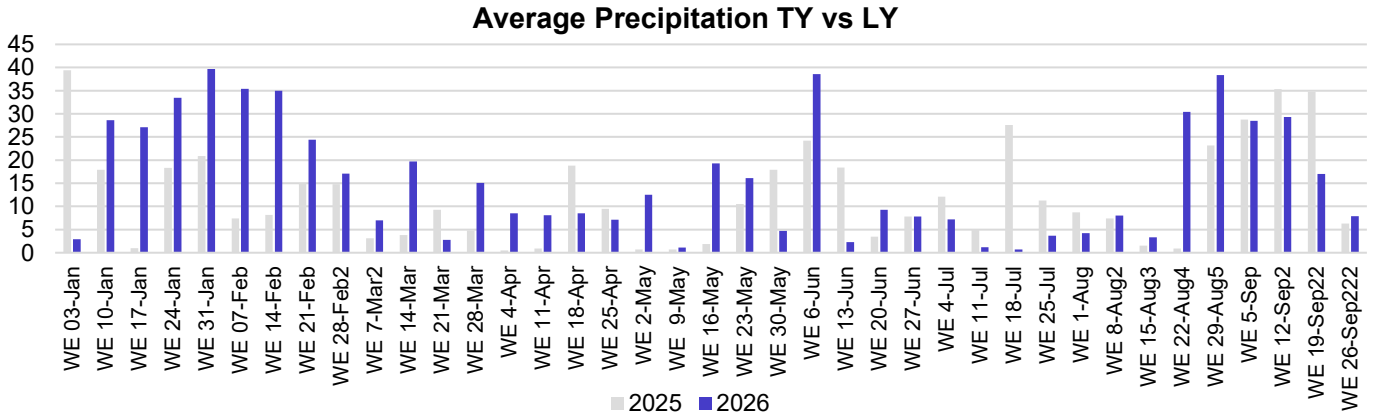
Classification - Internal

2026 is much wetter than 2025 with an average weekly rainfall of +3.8mm per week. The average weekly max temperature YTD is +0.3°C vs 2025. YTD impact of weather is +0.2% vol.









Average max temperature in Sept was 19.8°C, +1.7°C warmer than 2025 *(+1.3 °C warmer than the 30-year average)*

August saw 11 days over the 23.5°C threshold

Average weekly rainfall was 20.7 mm in Sep; -10.6mm Lower than Sept 2025

Weather Impact 2026 vs 2025

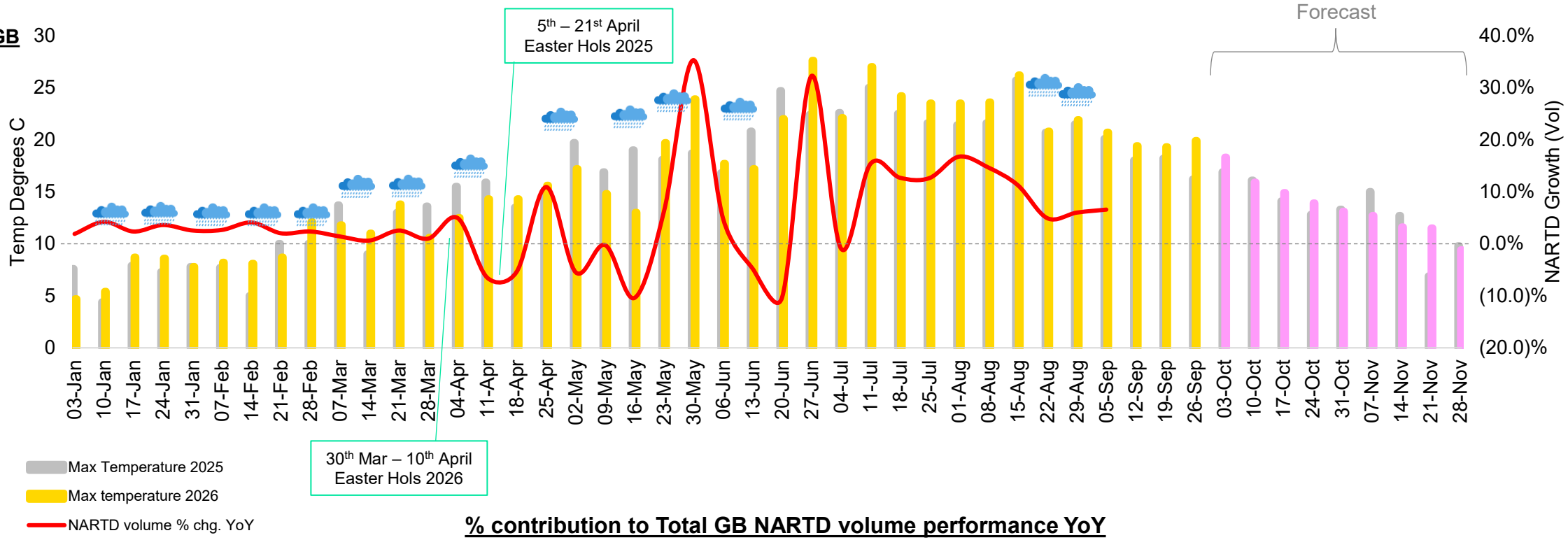
Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	*Sept	Q1	Q2	**Q3
-0.5%	-0.6%	-1.3%	-1.6%	-6.0%	+1.4%	+4.8%	+4.3%	+4.0%	-0.9%	-1.7%	+4.4%

Source: weathertrends360 + Smith Institute | Observed weather until w/e 27.09.26 | Weather impact modelled for Nielsen Total Soft Drinks Volume Sales w.e. 05.09.26, *Estimated ** FORECAST

Classification - Internal

June, July, August and early Sept saw volume uplift vs 2025 due to warm weather.

A wet 2nd half of August is likely to see this trend soften, despite the warmer temperatures. September is due to also see an uplift vs 2025.



% contribution to Total GB NARTD volume performance YoY

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	*Sept	Q1	Q2
Weather Impact	**-0.5%**	**-0.6%**	**-1.3%**	**-1.6%**	**-6.0%**	**+1.4%**	**+4.8%**	**+4.3%**	**+4.0%**	**-0.9%**	**-1.8%**
Price contribution	-1.4%	-0.9%	-1.7%	-1.5%	-1.1%	-1.4%	-1.1%	-2.8%	-2.3%	-1.3%	-1.5%
Distribution contribution	1.3%	1.3%	2.1%	1.9%	2.3%	4.2%	3.2%	2.0%	-1.8%	1.6%	3.1%
Trend Contribution	3.5%	3.3%	3.4%	flat	1.7%	2.9%	2.7%	3.6%	-3.9%	3.4%	1.4%
NARTD Volume % Chg YoY	**+3.0%**	**+2.8%**	**+1.6%**	**+1.0%**	**-2.3%**	**+10.9%**	**+9.8%**	**+11.8%**	**+6.3%#**	**+2.7%**	**+4.3%**

#NARTD sales volume only up to 5th Sept

Source: weathertrends360 + Smith Institute | Observed weather until w/e 27.09.26 | Weather impact modelled for Nielsen Total Soft Drinks Volume Sales w.e. 05.09.26, *Estimated ** FORECAST

Classification - Internal

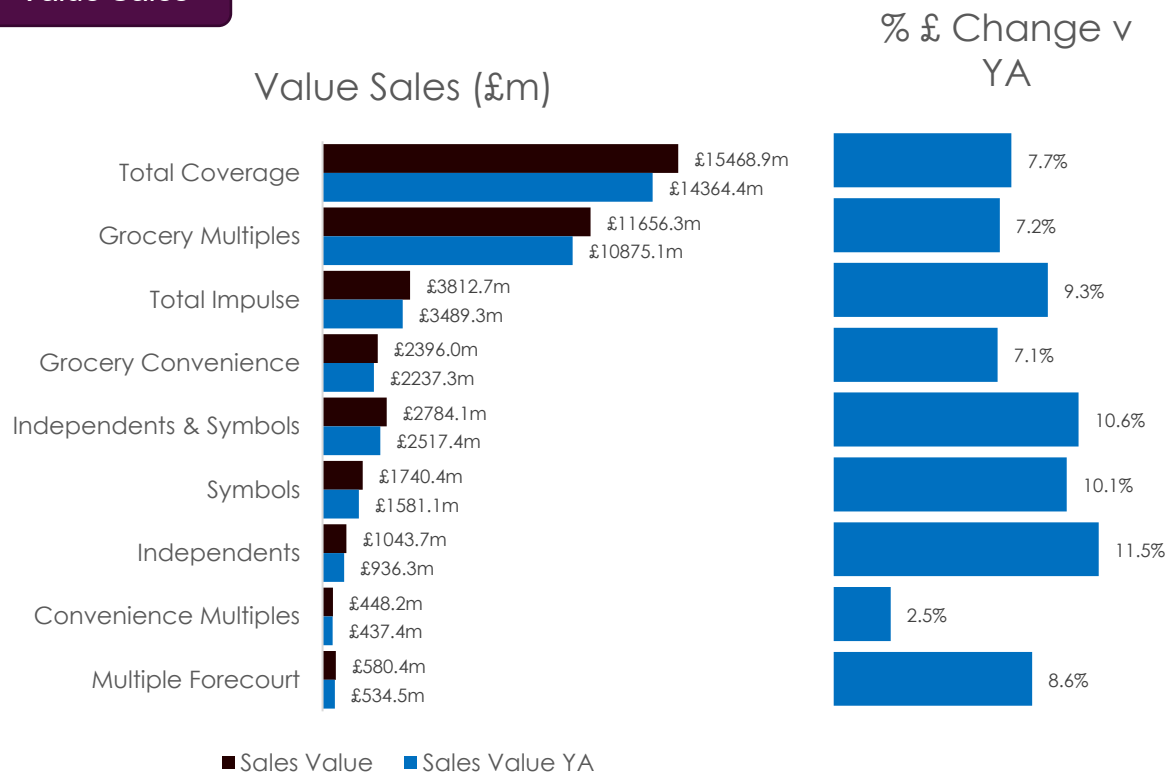
Retail Soft Drinks Market Performance

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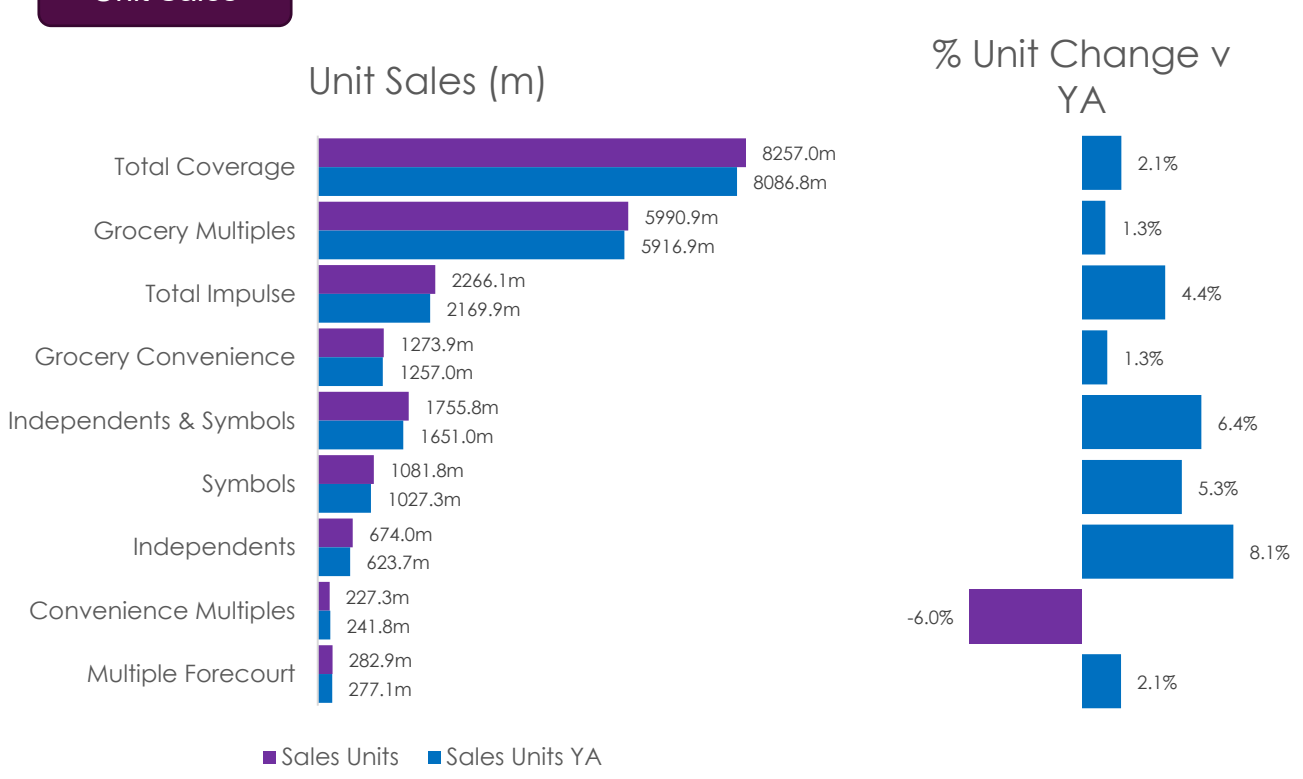
Ambient Soft Drinks Channel Performance MAT

Value sales are growing across all channels, with Independents delivering the strongest growth, while Multiple Forecourts remain the only channel in unit decline.

Value Sales



Unit Sales



Source: (1) Nielsen GTC MAT w.e. 3.10. 2026

Classification - Internal

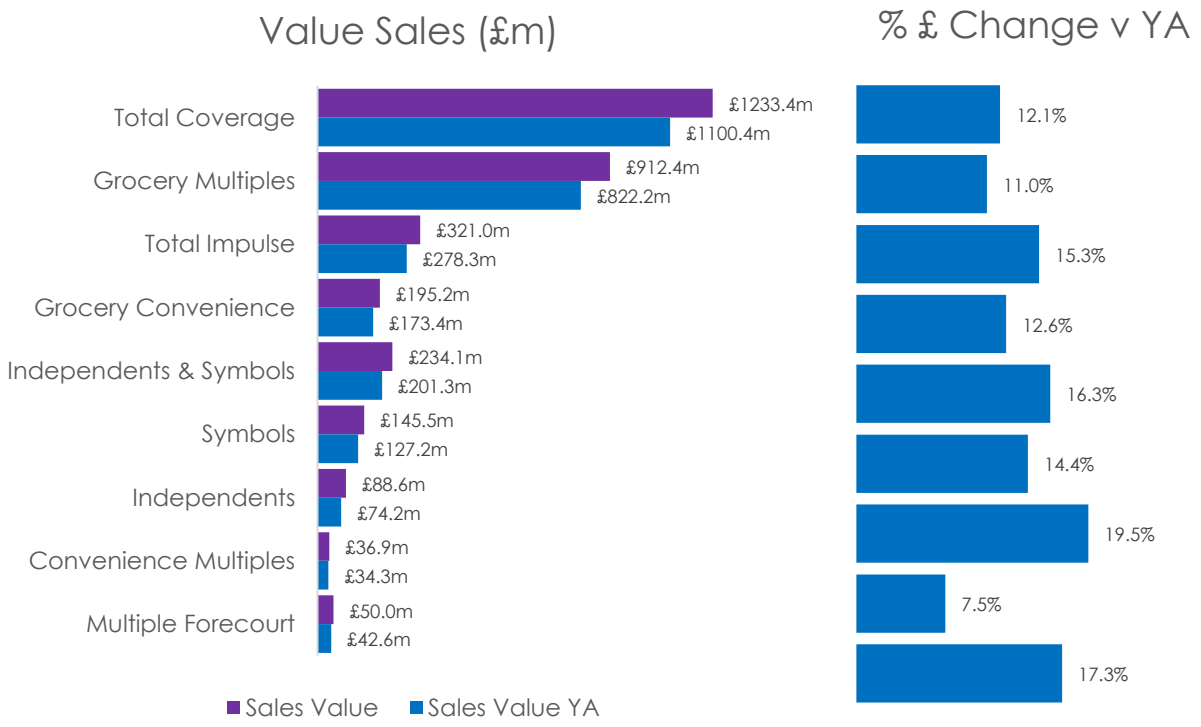
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Ambient Soft Drinks Channel performance L4wks

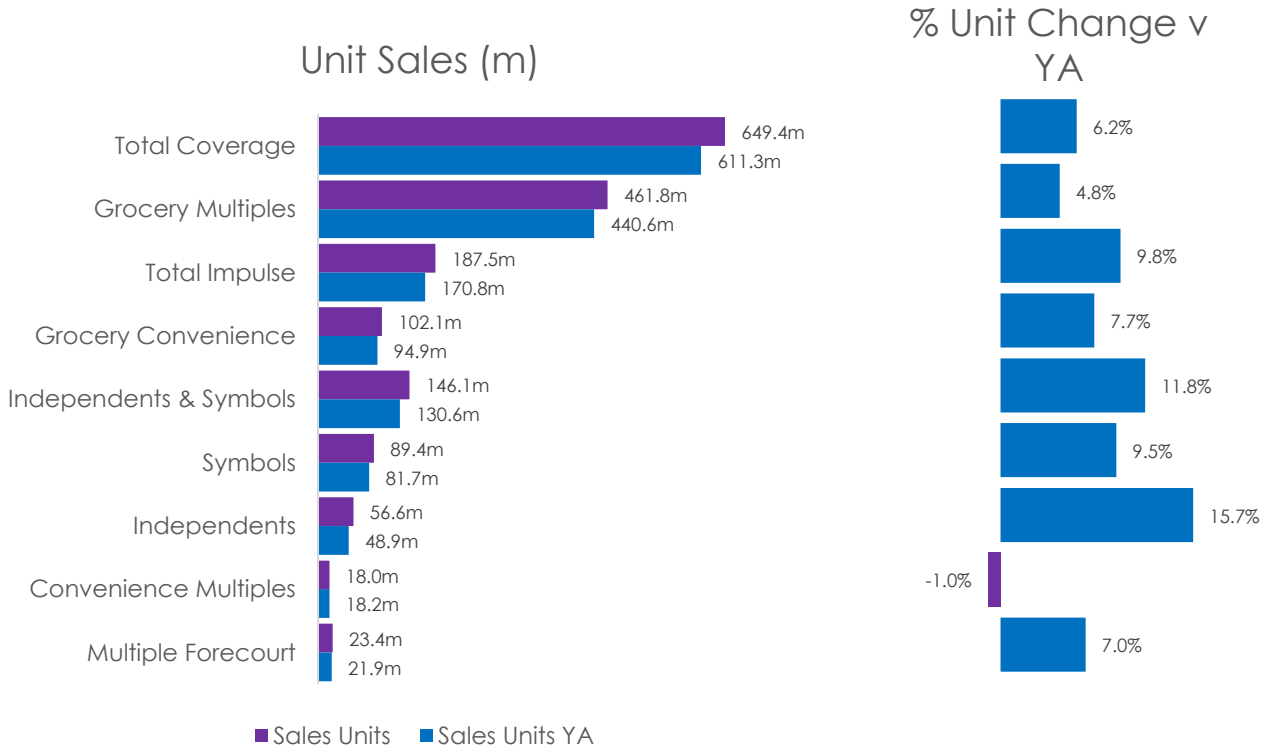
Over the latest 4 weeks, value sales have grown across every channel, led by Independents, while Convenience Multiples remain the only channel under pressure on units.

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Value Sales



Unit Sales



Source: (1) Nielsen GTC L4 w.e. 03.10..2026

Classification - Internal

Source: Nielsen IQ Total GB value and Unit sales MAT and L12W w.e. 03.10.2026

Total GB Soft Drinks Performance

	Total Coverage Latest 52 wks					
Sector	Sales TY	Sales v LY	Sales v LY %	Units TY	Units v LY	Units v LY %
Energy	£2654.8m	£281.0m	11.8%	1351.0m	55.0m	4.2%
Cola	£3122.1m	£148.2m	5.0%	1307.1m	-6.1m	-0.5%
Water	£2322.7m	£253.8m	12.3%	1472.9m	63.0m	4.5%
Flavours	£1695.3m	£75.1m	4.6%	986.5m	-28.9m	-2.8%
Pure Juice & Juice Drinks	£2688.6m	£123.9m	4.8%	1412.0m	16.3m	1.2%
Sports	£413.5m	£42.8m	11.6%	243.2m	19.6m	8.8%
Dairy	£1017.2m	£105.5m	11.6%	559.8m	44.5m	8.6%
RTD Coffee	£387.0m	£33.9m	9.6%	251.3m	20.5m	8.9%
Squash	£678.8m	£29.4m	4.5%	377.7m	-7.6m	-2.0%
RTD Tea	£157.6m	£16.6m	11.8%	79.8m	6.0m	8.1%
Mixers	£331.4m	-£5.6m	-1.7%	215.6m	-12.3m	-5.4%
Total	**£15468.9m**	**£1104.5m**	**7.7%**	**8257.0m**	**170.2m**	**2.1%**

In Total GB Soft Drinks value sales are up +7.7%.

Both Drink Now & Take Home remain in growth. Drink Now leading growth +9.8%

Total Units remains in growth with Dairy, Sports and RTD Coffee driving the growth. RTD Tea and Mixers in the greatest decline.

	Total Coverage Latest 12 wks					
Sector	Sales TY	Sales v LY	Sales v LY %	Units TY	Units v LY	Units v LY %
Energy	£690.4m	£85.1m	14.1%	344.6m	19.0m	5.8%
Cola	£796.3m	£77.2m	10.7%	331.0m	15.6m	4.9%
Water	£645.8m	£107.1m	19.9%	397.0m	36.8m	10.2%
Flavours	£445.7m	£41.7m	10.3%	252.2m	4.8m	2.0%
Pure Juice & Juice Drinks	£664.2m	£57.0m	9.4%	352.4m	25.6m	7.8%
Sports	£114.8m	£18.0m	18.6%	67.7m	9.8m	16.9%
Dairy	£255.1m	£26.1m	11.4%	139.7m	9.9m	7.6%
RTD Coffee	£111.3m	£13.6m	14.0%	72.1m	9.4m	14.9%
Squash	£170.2m	£13.7m	8.7%	92.8m	0.6m	0.7%
RTD Tea	£42.9m	£5.1m	13.4%	22.4m	2.8m	14.0%
Mixers	£76.7m	£0.1m	0.1%	50.1m	-1.5m	-3.0%
Total	**£4013.4m**	**£444.6m**	**12.5%**	**2122.0m**	**132.8m**	**6.7%**

In Total GB Soft Drinks value remains in growth at +12.5%.

Both Drink Now & Take Home in value growth. Drink Now +13.3% Take Home +11.8%.

Units remains in growth vs PY driven by Water, RTD Tea & Sports.

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Total GB Soft Drinks Performance

	Total Coverage Latest 4 wks					
Sector	Sales TY	Sales v LY	Sales v LY %	Units TY	Units v LY	Units v LY %
Energy	£225.5m	£30.4m	15.6%	112.7m	7.6m	7.3%
Cola	£249.9m	£26.2m	11.7%	103.7m	5.7m	5.8%
Water	£187.2m	£27.6m	17.3%	115.0m	8.1m	7.6%
Flavours	£130.3m	£12.5m	10.6%	73.8m	1.5m	2.1%
Pure Juice & Juice Drinks	£204.4m	£15.2m	8.0%	108.4m	6.7m	6.6%
Sports	£35.0m	£5.3m	17.9%	20.6m	2.9m	16.2%
Dairy	£83.9m	£8.3m	10.9%	45.9m	3.5m	8.2%
RTD Coffee	£34.0m	£4.6m	15.6%	21.9m	3.2m	17.0%
Squash	£49.9m	£2.8m	5.8%	27.1m	-0.8m	-2.9%
RTD Tea	£12.1m	£0.9m	8.4%	6.2m	0.6m	10.2%
Mixers	£21.3m	-£0.7m	-3.2%	13.9m	-0.9m	-6.1%
Total	**£1233.4m**	**£132.9m**	**12.1%**	**649.4m**	**38.0m**	**6.2%**

Over L4W Soft Drinks value growth is up 12.1% vs PY, Units in growth at 6.2%

Both Take home and Drink now are in Value and Unit growth
Drink now is in value growth 14.1% which is driven by Water, Sports, and RTD Coffee
Take home is in value growth 10.6% which is driven by Energy, Sports , Water

Coca-Cola EUROPACIFIC PARTNERS

Source: Nielsen IQ Total GB value and Unit sales latest 4 weeks w.e. 03.10.2026

Classification -
Internal

Source: Nielsen IQ Tot Impulse value and Unit sales MAT & L12W w.e. 03.10.26

Total Impulse Soft Drinks Performance

	Total Impulse Latest 52 wks					
Sector	Sales TY	Sales v LY	Sales v LY %	Units TY	Units v LY	Units v LY %
Energy	£1378.4m	£181.3m	15.1%	766.9m	65.8m	9.4%
Cola	£681.0m	£11.8m	1.8%	371.0m	-9.0m	-2.4%
Water	£517.9m	£49.3m	10.5%	328.7m	13.1m	4.1%
Flavours	£430.1m	£11.2m	2.7%	298.9m	-2.7m	-0.9%
Pure Juice & Juice Drinks	£303.6m	£17.5m	6.1%	193.7m	6.6m	3.5%
Sports	£180.9m	£26.0m	16.8%	124.4m	14.6m	13.3%
Dairy	£149.1m	£13.4m	9.9%	88.2m	4.3m	5.1%
RTD Coffee	£87.8m	£12.8m	17.1%	46.4m	5.3m	12.8%
Squash	£35.8m	£1.3m	3.6%	19.3m	-0.1m	-0.6%
RTD Tea	£27.8m	-£0.5m	-1.9%	15.7m	-0.8m	-4.9%
Mixers	£20.4m	-£0.6m	-2.9%	12.9m	-1.0m	-6.9%
Total	**£3812.7m**	**£323.4m**	**9.3%**	**2266.1m**	**96.1m**	**4.4%**

In Total Impulse Soft Drinks value sales are up +9.3%.

Both Drink Now & Take Home remain in growth. Drink Now leading growth +9.8%

Total Units remains in growth with Dairy, Sports and RTD Coffee driving the growth. RTD Tea and Mixers in the greatest decline.

	Total Impulse Latest 12 wks					
Sector	Sales TY	Sales v LY	Sales v LY %	Units TY	Units v LY	Units v LY %
Energy	£365.3m	£53.4m	17.1%	198.3m	17.6m	9.8%
Cola	£179.8m	£13.7m	8.2%	97.3m	3.8m	4.0%
Water	£153.7m	£25.3m	19.7%	95.3m	11.0m	13.0%
Flavours	£117.1m	£8.0m	7.3%	80.1m	2.9m	3.7%
Pure Juice & Juice Drinks	£83.3m	£10.0m	13.6%	53.9m	6.6m	14.0%
Sports	£53.0m	£11.1m	26.6%	36.0m	6.8m	23.1%
Dairy	£40.4m	£4.8m	13.3%	23.2m	1.5m	6.8%
RTD Coffee	£25.9m	£4.7m	22.1%	13.5m	2.0m	17.7%
Squash	£9.3m	£0.8m	10.0%	4.9m	0.3m	6.1%
RTD Tea	£8.0m	£0.2m	2.5%	4.5m	0.0m	-0.1%
Mixers	£5.0m	£0.1m	2.4%	3.2m	-0.1m	-3.4%
Total	**£1040.8m**	**£132.1m**	**14.5%**	**610.2m**	**52.3m**	**9.4%**

In Total Impulse over L12W Soft Drinks value remains in growth at +14.5%.

Both Drink Now & Take Home in value growth. Drink Now +15.0%, Take Home +12.8%.

Units remains in growth vs PY driven by Juice Drinks, RTD & Sports.

Source: Nielsen IQ Total Impulse value and Unit sales L4W w.e. 03.10.2026

Total Impulse Soft Drinks Performance

	Total Impulse Latest 4 wks					
Sector	Sales TY	Sales v LY	Sales v LY %	Units TY	Units v LY	Units v LY %
Energy	£120.1m	£19.7m	19.7%	65.0m	6.8m	11.6%
Cola	£56.4m	£5.2m	10.2%	30.6m	1.8m	6.1%
Water	£42.6m	£6.2m	16.9%	26.3m	2.5m	10.3%
Flavours	£34.7m	£2.6m	8.1%	23.7m	0.9m	3.9%
Pure Juice & Juice Drinks	£24.1m	£2.3m	10.7%	15.8m	1.7m	11.9%
Sports	£16.1m	£3.5m	27.9%	11.0m	2.2m	24.3%
Dairy	£12.8m	£1.5m	12.8%	7.4m	0.4m	5.6%
RTD Coffee	£8.0m	£1.5m	22.6%	4.2m	0.7m	19.2%
Squash	£2.6m	£0.1m	5.9%	1.4m	0.0m	2.3%
RTD Tea	£2.2m	£0.0m	2.2%	1.2m	0.0m	-1.5%
Mixers	£1.5m	£0.0m	1.2%	0.9m	0.0m	-5.1%
Total	**£321.0m**	**£42.7m**	**15.3%**	**187.5m**	**16.8m**	**9.8%**

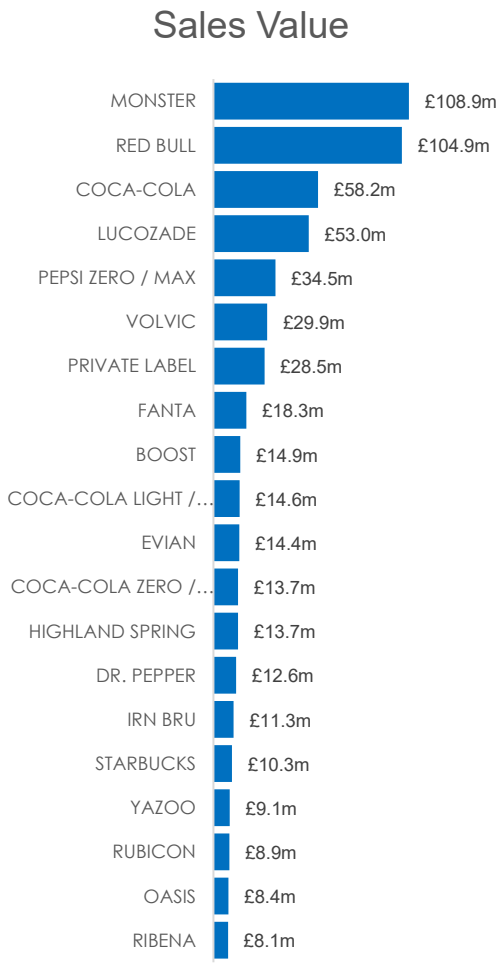
Over L4W Soft Drinks value growth is up 15.3% vs PY, Units in growth at 9.8%

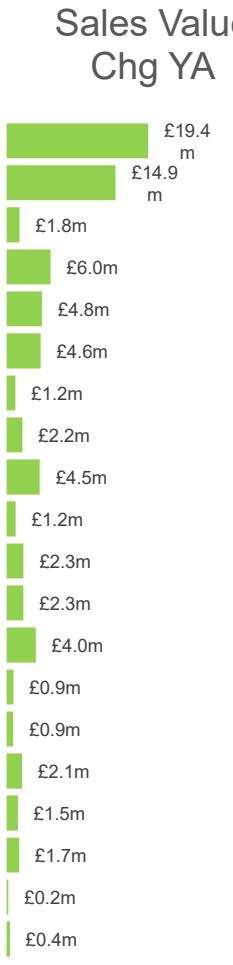
Both Take home and Drink now are in Value and Unit growth
Drink now is in value growth 16.2% which is driven by Water, Sports, and RTD Coffee
Take home is in value growth 12.3% which is driven by Energy, Sports , Water

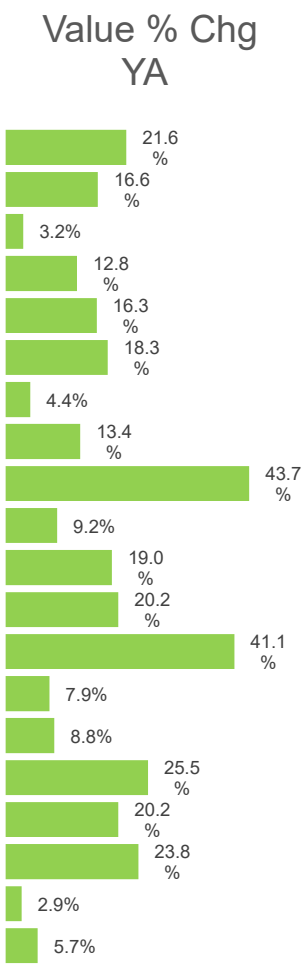
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Top 20 Brands in Total Impulse

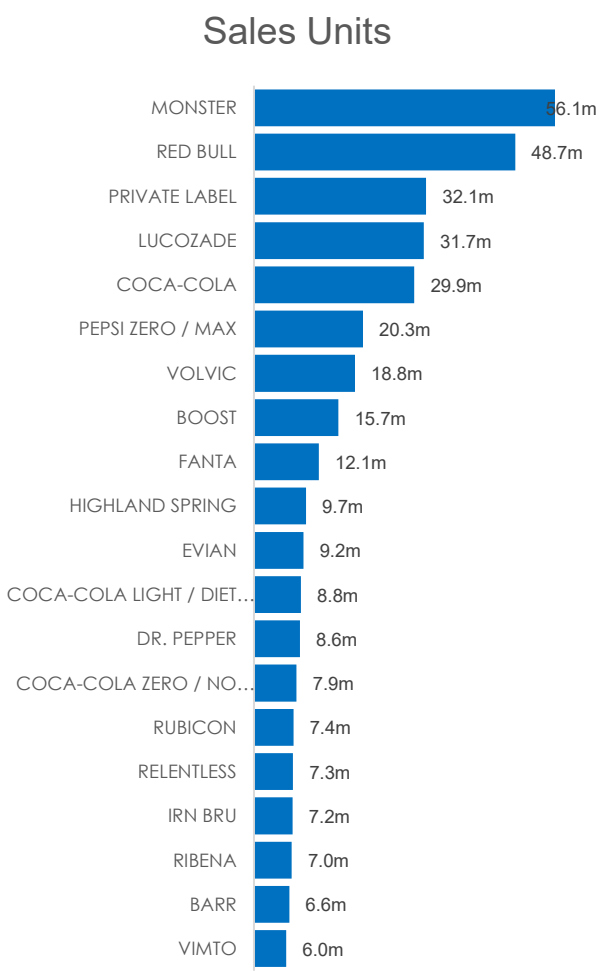
Value

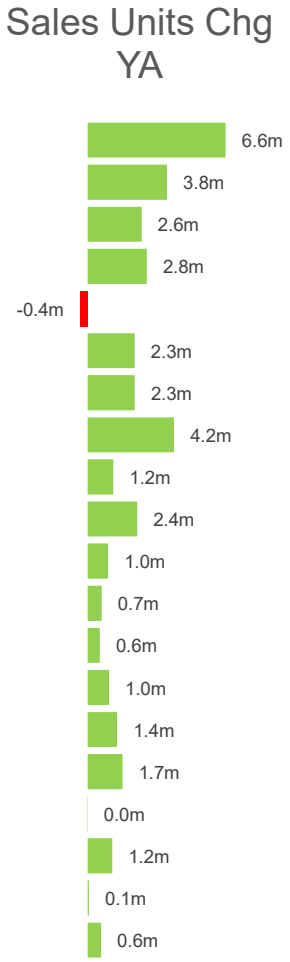


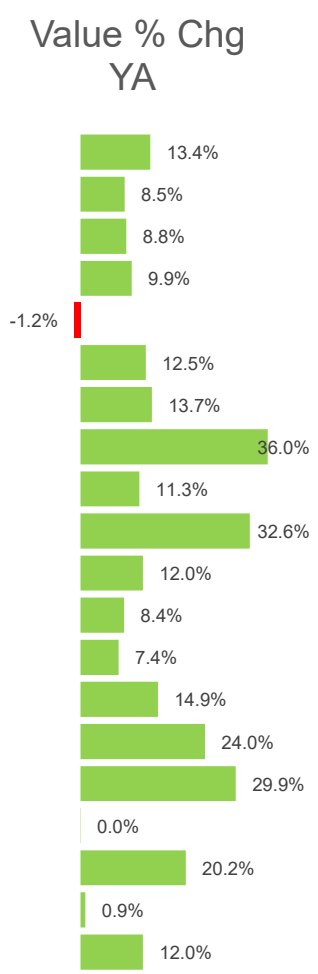




Units







Source: Nielsen GTC Total Impulse L12 weeks w.e. 03.10. 2026

Classification - Internal

Source: Nielsen IQ I&S value and Unit sales MAT & L12W w.e. 03..10.2026

Independents & Symbols Soft Drinks Performance

Sector	Independents & Symbols Latest 52 wks Sales TY	Sales v LY	Sales v LY %	Units TY	Units v LY	Units v LY %
Energy	£1058.7m	£153.6m	17.0%	618.3m	67.0m	12.2%
Cola	£499.4m	£11.4m	2.3%	281.2m	-4.0m	-1.4%
Water	£291.7m	£31.0m	11.9%	210.1m	12.3m	6.2%
Flavours	£340.4m	£11.2m	3.4%	249.9m	0.0m	0.0%
Pure Juice & Juice Drinks	£214.1m	£17.3m	8.8%	149.0m	9.1m	6.5%
Sports	£136.4m	£22.1m	19.3%	101.6m	13.3m	15.1%
Dairy	£119.3m	£9.5m	8.7%	74.0m	3.1m	4.3%
RTD Coffee	£58.2m	£10.0m	20.7%	32.7m	4.8m	17.1%
Squash	£31.5m	£1.3m	4.4%	17.0m	0.1m	0.8%
RTD Tea	£17.4m	-£0.6m	-3.4%	10.6m	-0.4m	-3.4%
Mixers	£17.0m	-£0.2m	-1.0%	11.5m	-0.6m	-5.1%
Total	**£2784.1m**	**£266.7m**	**10.6%**	**1755.8m**	**104.8m**	**6.4%**

Soft Drinks value growth is +10.6%, driven by Drink Now (+12.4%) outperforming Take Home (+5.7%)

Drink Now Value growth being driven by RTD Coffee and Lemonade

Take Home Value growth being driven by Sports, RTD Tea and Water.

Sector	Independents & Symbols Latest 12 wks Sales TY	Sales v LY	Sales v LY %	Units TY	Units v LY	Units v LY %
Energy	£276.8m	£41.1m	17.4%	158.7m	17.2m	12.2%
Cola	£130.8m	£10.2m	8.4%	73.8m	3.5m	4.9%
Water	£86.5m	£15.4m	21.7%	61.0m	8.1m	15.4%
Flavours	£91.9m	£6.3m	7.3%	66.7m	2.7m	4.2%
Pure Juice & Juice Drinks	£58.7m	£8.4m	16.6%	41.5m	6.2m	17.5%
Sports	£40.2m	£9.4m	30.6%	29.5m	6.0m	25.5%
Dairy	£31.8m	£3.2m	11.0%	19.3m	1.0m	5.7%
RTD Coffee	£16.7m	£3.2m	23.5%	9.4m	1.6m	20.4%
Squash	£8.1m	£0.7m	10.1%	4.3m	0.3m	6.9%
RTD Tea	£4.9m	£0.1m	2.6%	3.0m	0.0m	1.4%
Mixers	£4.3m	£0.2m	4.7%	2.8m	0.0m	-1.2%
Total	**£750.8m**	**£98.1m**	**15.0%**	**470.0m**	**46.6m**	**11.0%**

Soft Drinks value growth is in growth at +15.0%

,

Driven by Drink Now (+16.9%), out performing Take Home (+9.7%)

Take Home is seeing value growth across all sectors apart from RTD Coffee (- 23.0%)

In Drink Now everything is in value growth. When looking at Units only RTD Tea is in decline apart from RTD Tea (-0.5%)

Source: Nielsen IQ I&S value and volume in Liters sales L4W w.e. 03.10.2026

Independents & Symbols Soft Drinks Performance

	Independents & Symbols Latest 4 wks					
Sector	Sales TY	Sales v LY	Sales v LY %	Units TY	Units v LY	Units v LY %
Energy	£91.9m	£15.3m	19.9%	52.6m	6.4m	13.8%
Cola	£41.2m	£4.0m	10.6%	23.3m	1.5m	7.0%
Water	£23.6m	£3.7m	18.8%	16.7m	1.9m	13.0%
Flavours	£27.5m	£2.3m	9.0%	20.0m	1.0m	5.3%
Pure Juice & Juice Drinks	£17.2m	£2.3m	15.3%	12.3m	1.8m	16.9%
Sports	£12.3m	£3.0m	32.1%	9.1m	1.9m	27.1%
Dairy	£10.2m	£0.9m	10.2%	6.2m	0.3m	4.3%
RTD Coffee	£5.4m	£1.1m	25.4%	3.0m	0.6m	23.8%
Squash	£2.3m	£0.1m	7.0%	1.2m	0.0m	3.2%
RTD Tea	£1.4m	£0.0m	3.0%	0.8m	0.0m	1.5%
Mixers	£1.2m	£0.0m	4.1%	0.8m	0.0m	-3.0%
Total	**£234.1m**	**£32.8m**	**16.3%**	**146.1m**	**15.4m**	**11.8%**

Over L4W Soft Drinks sales value is in growth at +16.3% driven by Drink Now (+18.7%) outperforming Take Home (+9.3%)

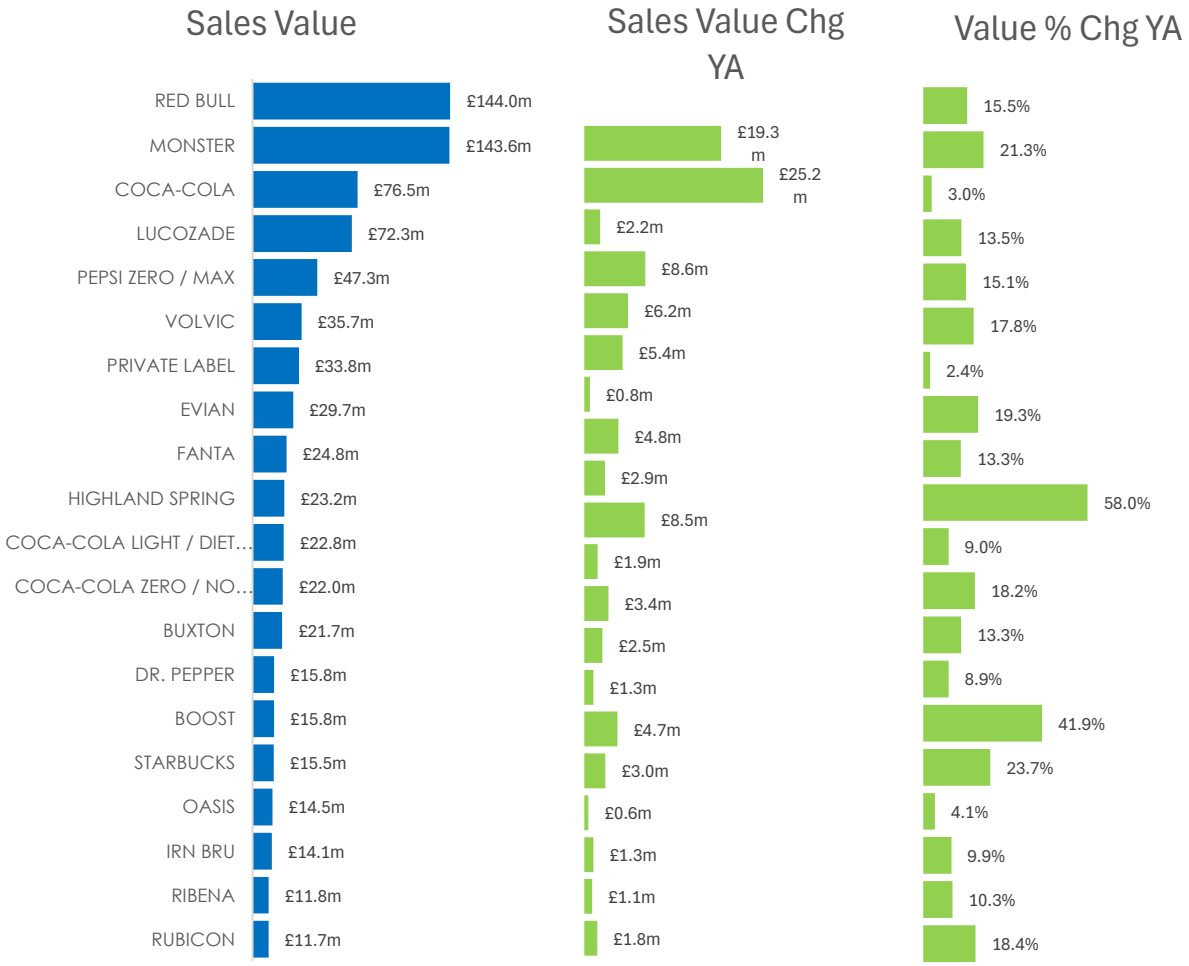
Drink Now Value growth being driven by Sports and RTD Coffee.

Take Home Value growth being driven by Sports and Water . The only sector in decline across Value is RTD Coffee (-26.7%)

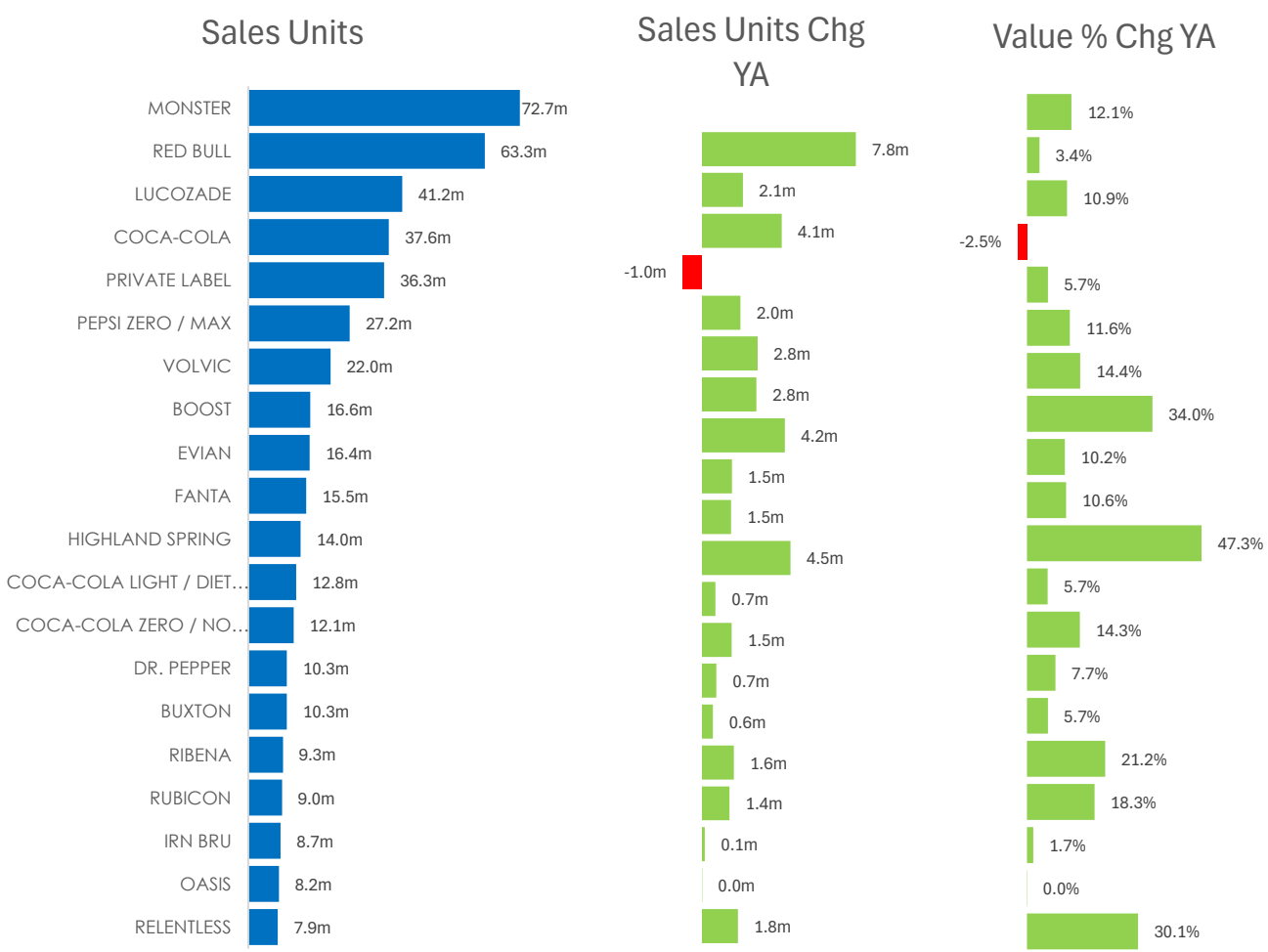
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Top 20 Brands in Indies & Symbols

Value



Volume



Source: Nielsen GTC I&S L12 weeks w.e. 03.10.26

Classification - Internal

Food Service Market Performance

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Food Service key headlines

1

Foodservice Soft Drinks remain under pressure, but On Trade continues to outperform

Total Soft Drinks remains in value and volume decline overall, with Education & Workplace driving much of the decline. In contrast, On Trade channels are delivering stronger growth and supporting category performance.

2

Education & Workplace continues to weigh on category recovery

Lower workplace and education footfall is impacting Soft Drinks performance, offsetting growth seen across several On Trade segments including pubs and hotels.

3

Consumers remain selective with out of home spend

Value remains a key consideration as consumers carefully balance discretionary spending across food and drink occasions.

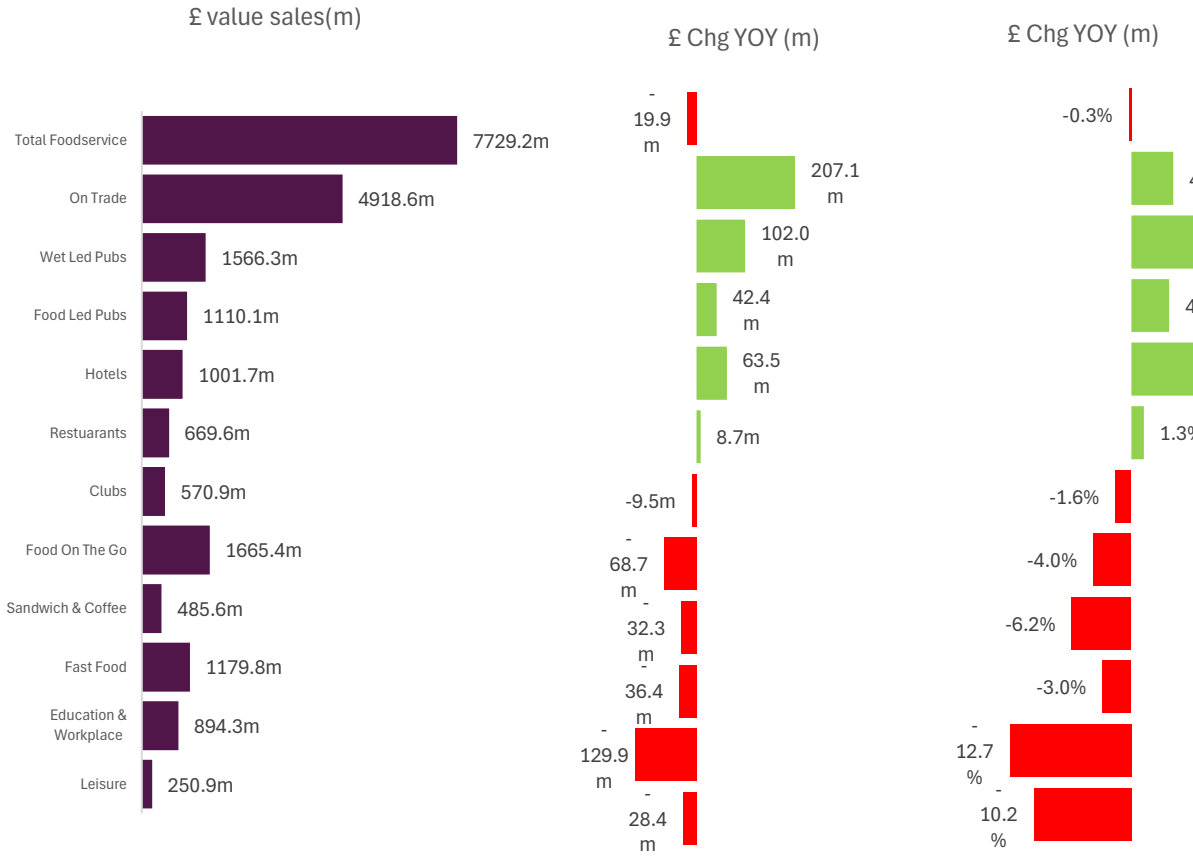
Source: 1 Lumina Intelligence July 2026, July 2026)

Classification - Internal

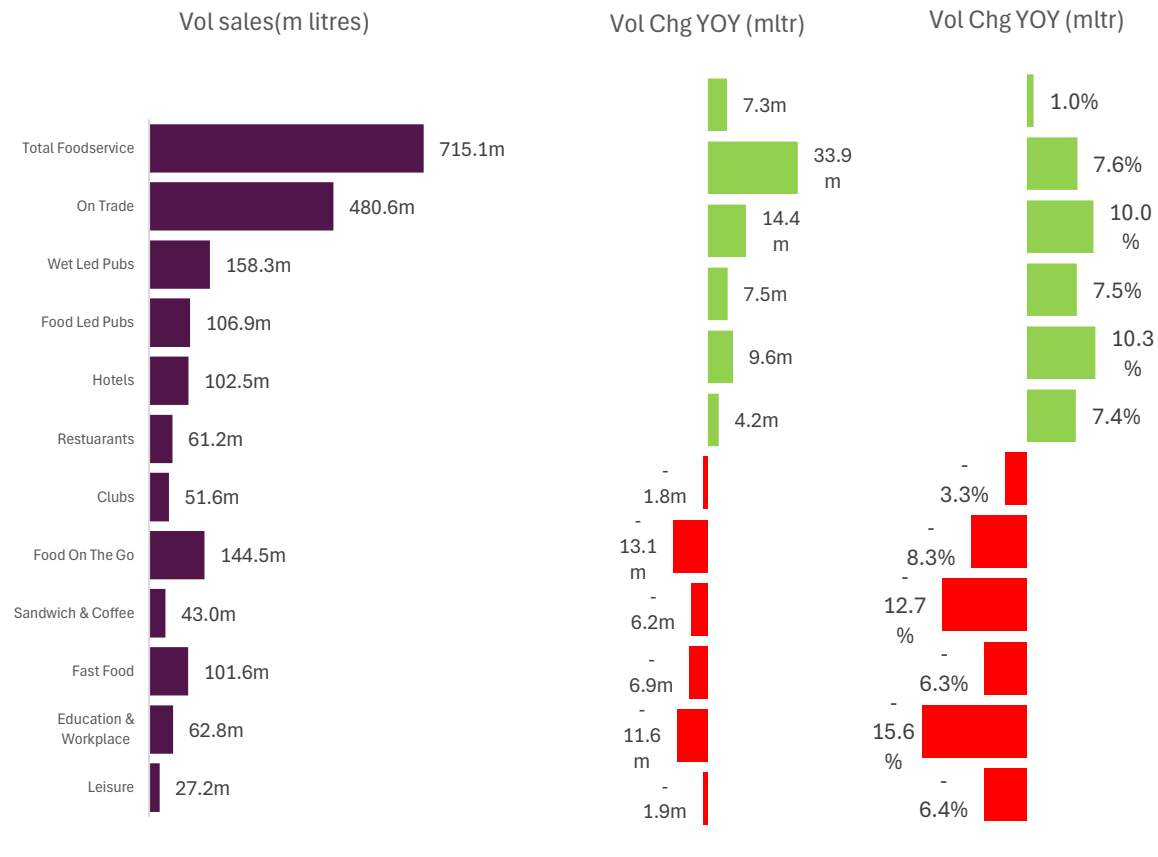
Soft Drinks Performance in Foodservice MAT

Total Foodservice Soft drinks is in slight value decline. YoY overall with Value in decline / Education and Workplace driving overall decline. Much more positive performance in On Trade.

Value Sales



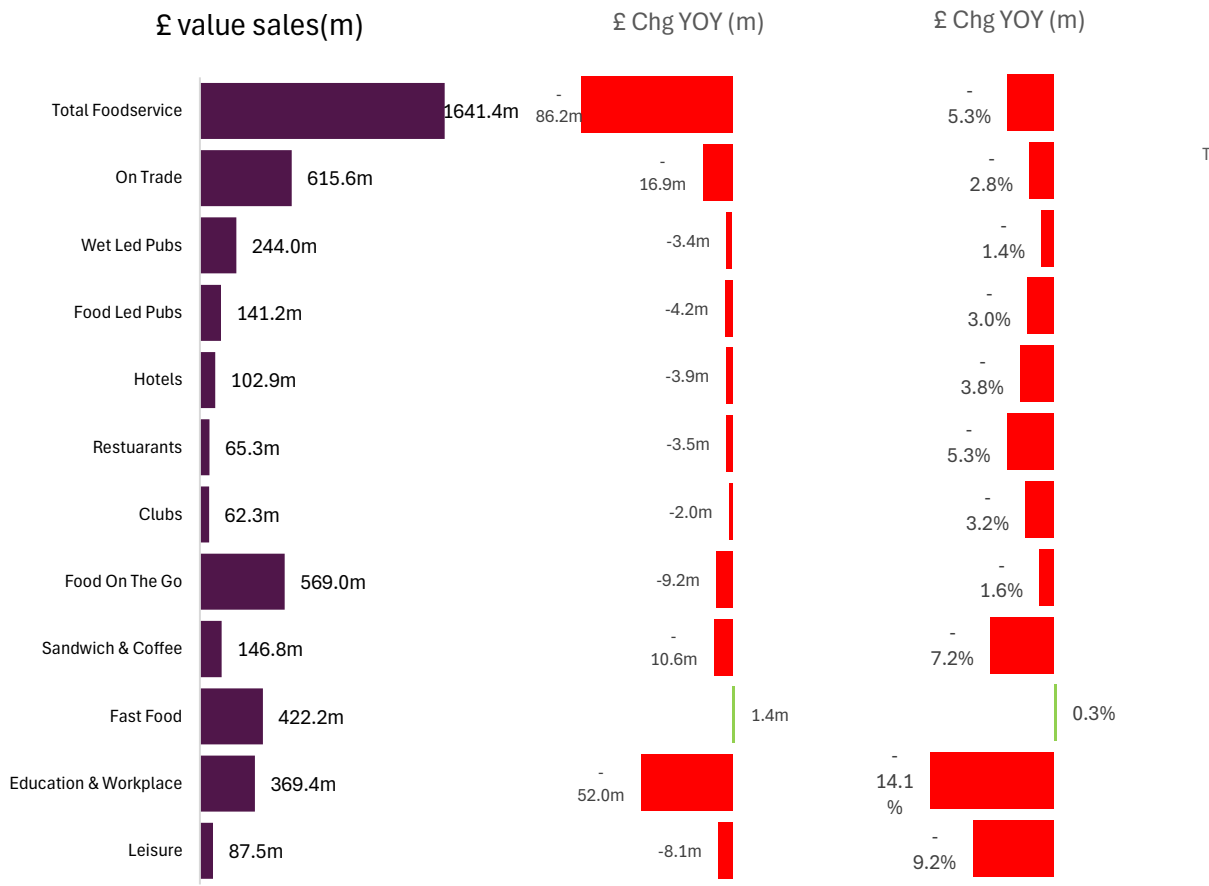
Volume Sales



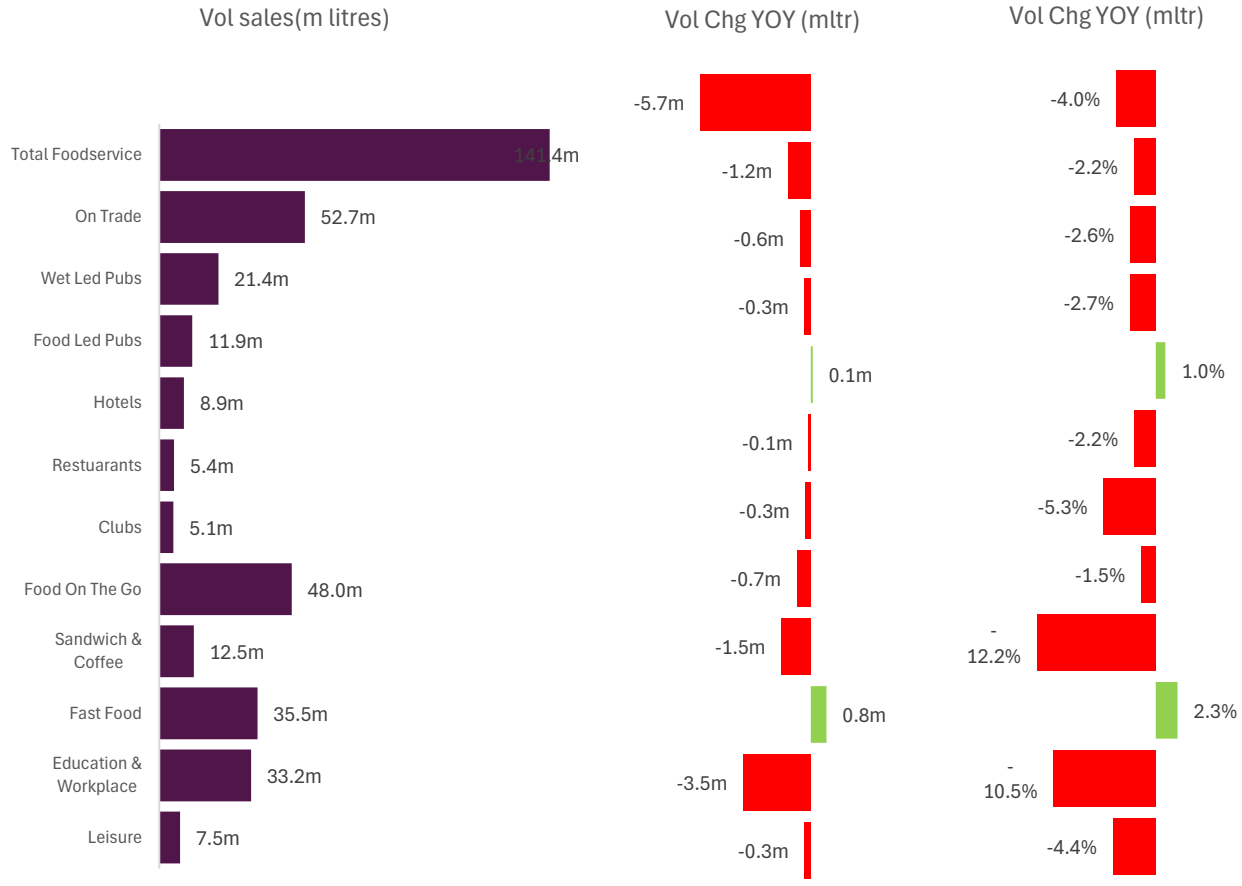
Soft Drinks Performance in Foodservice September

Total Soft drinks is in both Value and Vol decline. YoY overall with values in decline / Education and Workplace driving overall declines ,Fast Food showing a positive performance across Vol and Val

Value Sales



Volume Sales



Foodservice Soft Drinks Performance

Source: Nielsen IQ Food Service Value and Unit sales MAT & L4W w.e. 31..07.2026

£ Value Sales MAT				Volume (L) MAT		
Foodservice	Value			Volume		
	Sales Value	Sales Value Chg YA	Sales Value % Chg YA	Sales LITRES	Sales LITRES Chg YA	Sales LITRES % Chg YA
Total Soft Drinks	£7729.2m	-£19.9m	-0.3%	1555.3m	-86.2m	-5.3%
Cola	£3434.9m	£130.3m	3.9%	674.0m	-14.6m	-2.1%
Juices	£1169.0m	-£52.4m	-4.3%	219.2m	-24.7m	-10.1%
Flavours & Lemonade	£1239.0m	-£19.7m	-1.6%	273.6m	-10.8m	-3.8%
Water	£577.3m	-£43.4m	-7.0%	182.5m	-16.9m	-8.5%
Mixers	£490.2m	-£17.7m	-3.5%	38.8m	-5.4m	-12.2%
Squash	£415.7m	-£48.0m	-10.3%	111.7m	-16.2m	-12.6%
Energy	£311.5m	£16.7m	5.7%	34.4m	-0.7m	-2.0%
RTD Tea	£24.2m	-£0.6m	-2.3%	5.3m	-0.2m	-2.9%
Sports	£38.0m	£1.0m	2.7%	9.8m	0.2m	1.6%
RTD Coffee	£16.4m	£0.6m	4.1%	3.0m	0.1m	3.0%

£ Value Sales L4W				Volume (L) L4W		
	Value			Volume		
Foodservice	Sales Value	Sales Value Chg YA	Sales Value % Chg YA	Sales LITRES	Sales LITRES Chg YA	Sales LITRES % Chg YA
Total Soft Drinks	£715.1m	£7.3m	1.0%	138.5m	-7.8m	-5.3%
Cola	£319.7m	£11.3m	3.7%	60.8m	-1.7m	-2.8%
Juices	£102.7m	-£5.6m	-5.2%	18.4m	-2.6m	-12.5%
Flavours & Lemonade	£116.3m	-£4.1m	-3.4%	24.3m	-2.4m	-9.0%
Water	£52.4m	£1.3m	2.6%	16.4m	0.3m	2.2%
Mixers	£45.5m	£0.5m	1.1%	3.5m	-0.3m	-7.8%
Squash	£41.6m	£0.6m	1.4%	10.2m	-1.3m	-11.6%
Energy	£28.7m	£2.4m	9.0%	3.1m	0.1m	2.9%
RTD Tea	£2.3m	-£0.1m	-2.5%	0.5m	0.0m	-2.6%
Sports	£3.0m	-£0.3m	-9.2%	0.8m	-0.1m	-10.7%
RTD Coffee	£1.3m	-£0.3m	-16.3%	0.3m	0.0m	-15.2%

In Foodservice, Soft Drinks value sales and volume sales is in decline MAT..

MAT
Draught: +1.9% , £59.4m vs PY Value Sales
Packaged: -1.7%, -£79.4 vs PY Value Sales

L4W
Draught: +4.0%, +£11.6m vs PY. Value Sales
Packaged: -1.0%, -4.3m vs PY. Value Sales

Brand - MAT
Coca Cola (+1.5%), Diet Coke (+2.8%), Pepsi Max (+10.2%), Coke Zero (+9.9%) and R Whites (+10.2%).

Fast Food Soft Drinks Performance

£ Value Sales MAT

Volume (L) MAT

	Value			Volume		
Fast Food / QSR	Sales Value	Sales Value Chg YA	Sales Value % Chg YA	Sales LITRES	Sales LITRES Chg YA	Sales LITRES % Chg YA
Total Soft Drinks	£1179.8m	-£36.4m	-3.0%	0.9m	0.0m	-2.8%
Cola	£624.8m	-£13.2m	-2.1%	2.7m	0.0m	-0.2%
Juices	£147.8m	-£38.5m	-20.7%	0.9m	0.2m	23.9%
Flavours & Lemonade	£292.2m	£0.1m	0.0%	423.6m	1.4m	0.3%
Water	£72.4m	£5.4m	8.0%	229.3m	-1.8m	-0.8%
Mixers	£1.3m	-£0.7m	-34.3%	38.4m	-7.3m	-15.9%
Squash	£3.7m	-£1.5m	-29.6%	111.9m	5.9m	5.5%
Energy	£6.4m	-£0.5m	-6.7%	32.4m	2.6m	8.8%
RTD Tea	£10.9m	£0.5m	4.4%	0.3m	-0.1m	-19.8%
Sports	£3.1m	£0.3m	10.6%	1.3m	-0.9m	-40.0%
RTD Coffee	£5.4m	-£0.2m	-2.9%	1.7m	-0.1m	-7.7%

£ Value Sales L4W

Volume (L) L4W

	Value			Volume		
Fast Food / QSR	Sales Value	Sales Value Chg YA	Sales Value % Chg YA	Sales LITRES	Sales LITRES Chg YA	Sales LITRES % Chg YA
Total Soft Drinks	£101.6m	-£6.9m	-6.3%	37.3m	-0.4m	-0.9%
Cola	£53.4m	-£4.1m	-7.1%	20.0m	-0.7m	-3.4%
Juices	£12.1m	-£2.9m	-19.5%	3.2m	-0.7m	-18.3%
Flavours & Lemonade	£23.2m	-£4.5m	-16.1%	9.2m	-0.9m	-8.7%
Water	£8.6m	£3.4m	65.9%	3.8m	1.7m	76.2%
Mixers	£0.1m	£0.0m	-27.3%	0.0m	0.0m	-22.5%
Squash	£0.3m	-£0.1m	-25.6%	0.1m	0.0m	-33.8%
Energy	£0.6m	£0.0m	-3.6%	0.2m	0.0m	-1.3%
RTD Tea	£1.1m	£0.0m	3.1%	0.3m	0.0m	4.0%
Sports	£0.3m	£0.0m	-5.4%	0.1m	0.0m	-2.7%
RTD Coffee	£0.5m	-£0.1m	-14.4%	0.1m	0.0m	-14.3%

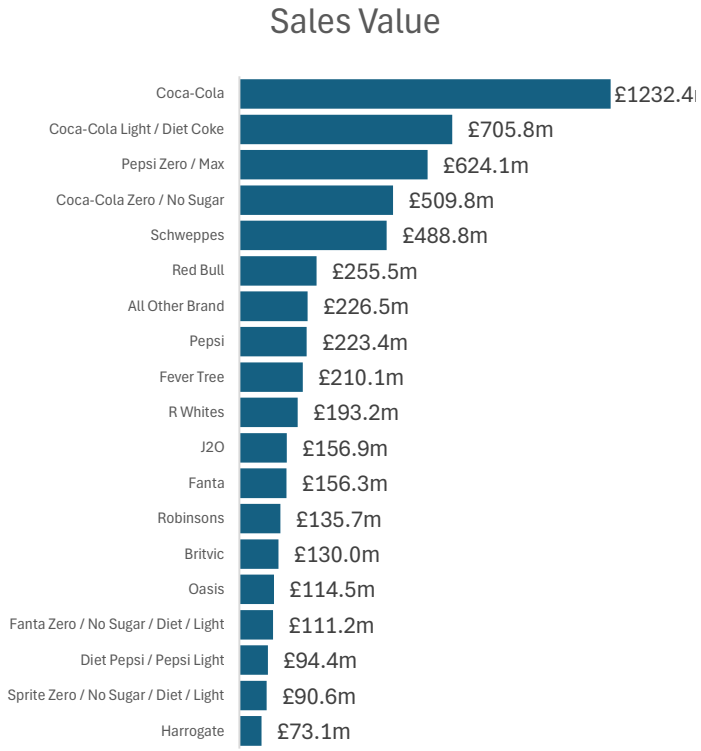
In Fast Food, Soft Drinks decline across value and volume MAT

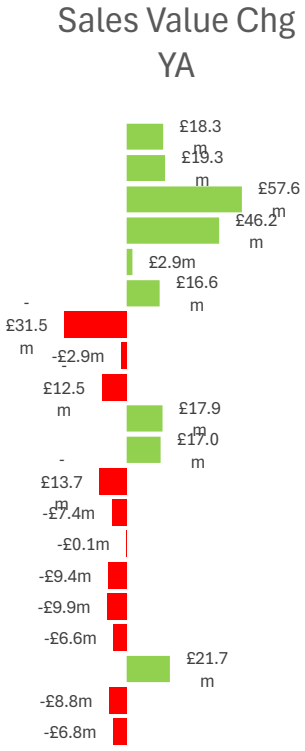
MAT
Draught: -1.6%
-£12.9m vs PY.
Packaged: -5.9%
-£55.8m vs PY.

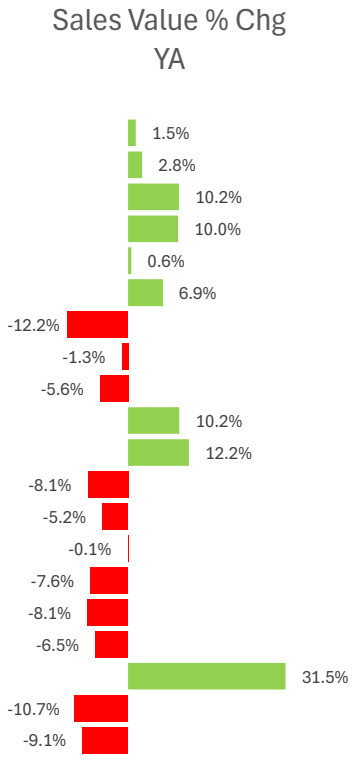
L4W
Draught: -8.0%
-£5.7m
Packaged: -8.6%
-£7.4m vs PY.

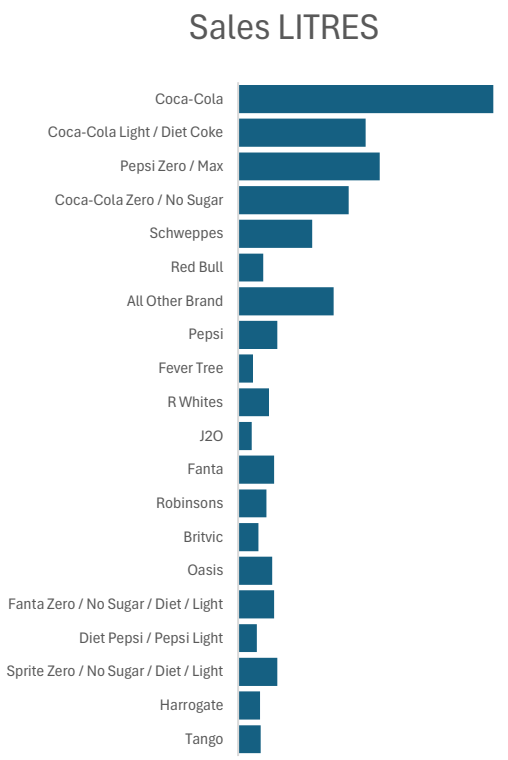
Brands MAT
Pepsi Max (-3.8%) and Coke Zero (+0.9%).

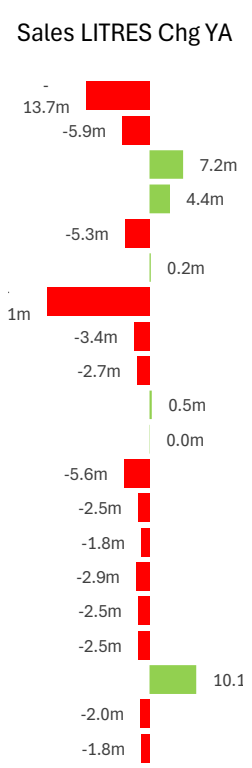
Top 20 Brands in Foodservice MAT

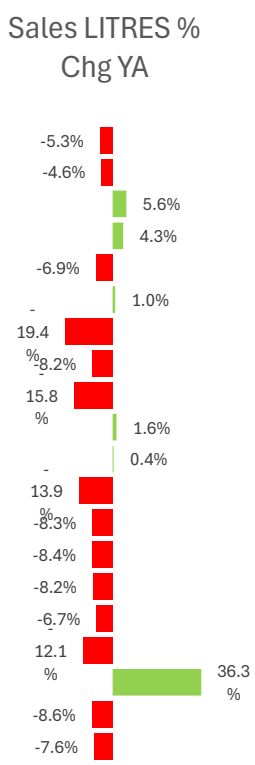








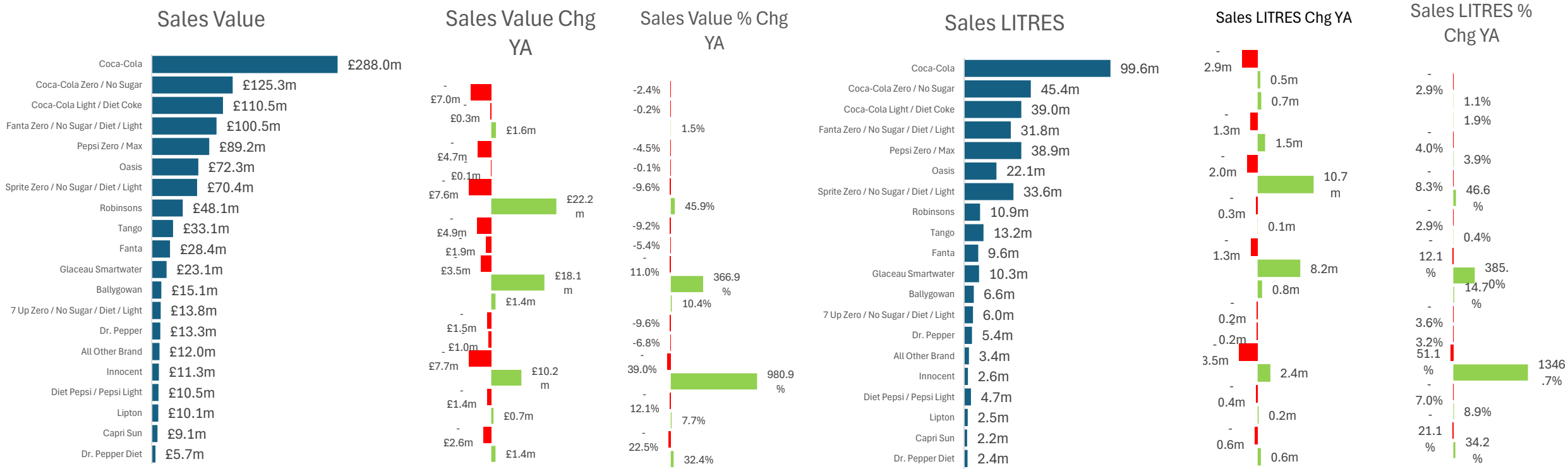




Source: Nielsen GTC MAT w.e. 31.07.26

Classification - Internal

Top 20 Brands in Fast Food MAT



Source: Nielsen GTC MAT w.e. 31.07.26

On-Premise Soft Drinks Performance

£ Value Sales MAT			Volume (L) MAT			
	Value			Volume		
On Prem	Sales Value	Sales Value Chg YA	Sales Value % Chg YA	Sales LITRES	Sales LITRES Chg YA	Sales LITRES % Chg YA
Total Soft Drinks	£4918.6m	£207.1m	4.4%	598.7m	-16.9m	-2.8%
Cola	£2383.9m	£168.3m	7.6%	311.8m	-3.1m	-1.0%
Juices	£518.0m	£47.1m	10.0%	51.6m	0.4m	0.8%
Flavours & Lemonade	£736.6m	£19.1m	2.7%	97.3m	-5.0m	-4.9%
Water	£209.5m	£5.5m	2.7%	29.7m	-1.5m	-4.7%
Mixers	£480.5m	-£15.2m	-3.1%	37.2m	-5.0m	-11.9%
Squash	£366.7m	-£35.3m	-8.8%	51.8m	-2.8m	-5.1%
Energy	£208.5m	£15.2m	7.9%	17.0m	-0.1m	-0.6%
RTD Tea	£3.9m	£0.3m	7.8%	0.4m	0.0m	0.1%
Sports	£9.1m	£1.3m	17.1%	1.7m	0.1m	6.7%
RTD Coffee	£1.0m	-£0.1m	-12.0%	0.1m	0.0m	-16.3%

£ Value Sales L4W			Volume (L) L4W			
	Value			Volume		
On Prem	Sales Value	Sales Value Chg YA	Sales Value % Chg YA	Sales LITRES	Sales LITRES Chg YA	Sales LITRES % Chg YA
Total Soft Drinks	£480.6m	£33.9m	7.6%	57.1m	-0.2m	-0.4%
Cola	£230.7m	£19.2m	9.1%	29.3m	0.2m	0.5%
Juices	£50.8m	£4.6m	10.1%	4.8m	0.0m	0.6%
Flavours & Lemonade	£75.2m	£4.2m	5.9%	9.7m	-0.2m	-2.1%
Water	£21.0m	£1.2m	6.1%	2.9m	0.0m	-1.3%
Mixers	£44.7m	£0.9m	2.0%	3.3m	-0.2m	-6.7%
Squash	£37.6m	£1.8m	5.1%	5.4m	0.1m	1.4%
Energy	£19.3m	£2.1m	12.0%	1.5m	0.1m	4.0%
RTD Tea	£0.4m	£0.0m	-1.9%	0.0m	0.0m	-8.3%
Sports	£0.8m	-£0.1m	-10.0%	0.1m	0.0m	-18.5%
RTD Coffee	£0.0m	-£0.1m	-83.5%	0.0m	0.0m	-87.1%

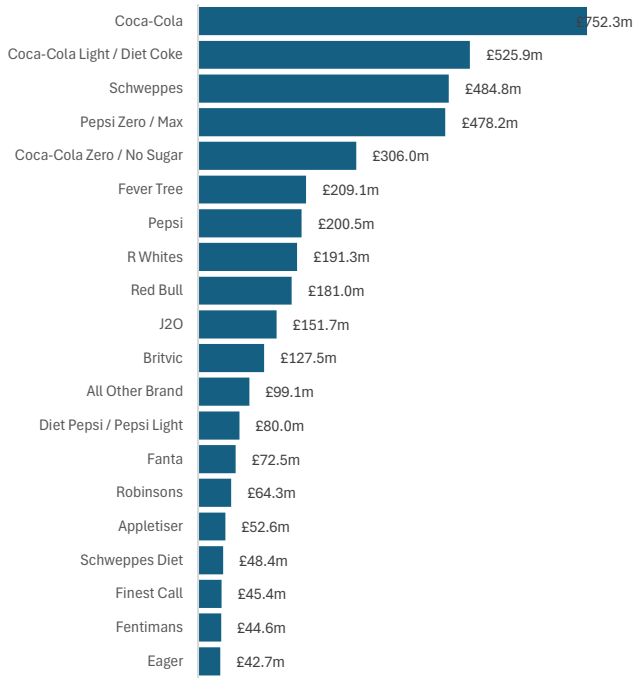
In On Premise Soft Drinks are in growth value and volume. MAT

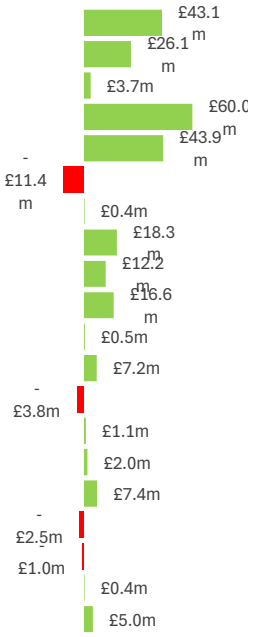
MAT
Draught: +3.3%
+£72.9m vs PY.
Packaged: +5.4%
+£134.2m vs PY.

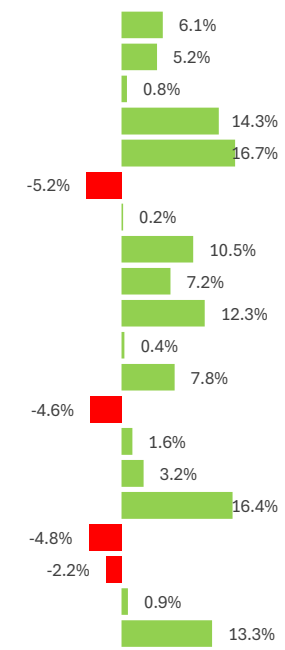
L4W
Draught: +8.1%
+£17.2m
Packaged: +7.1%
+£16.7m vs PY.

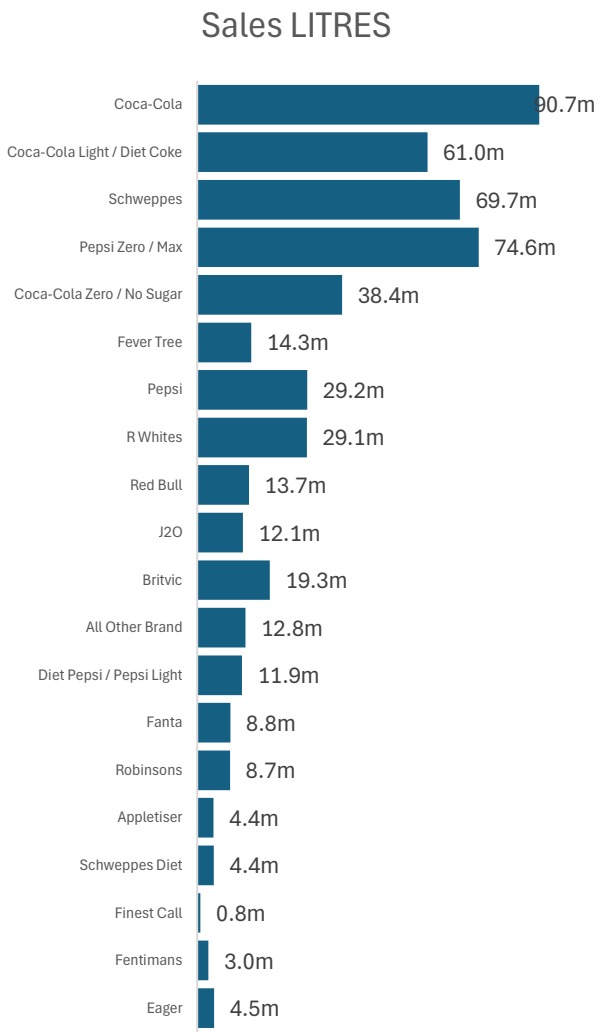
Brands MAT
Pepsi Max (+14.3%),
Coke Zero (+16.7%),
Diet Coke (+5.2%).

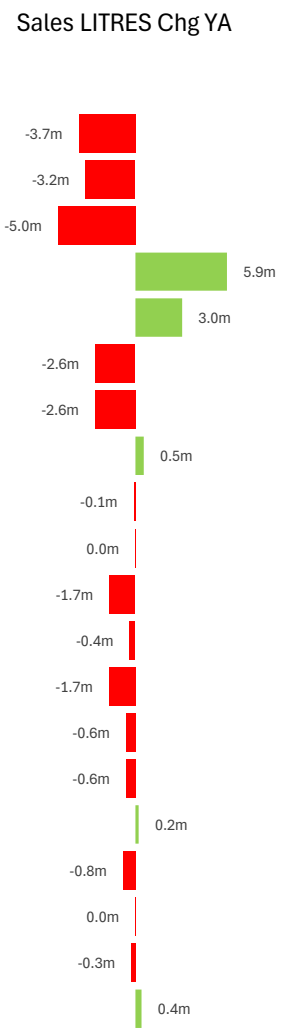
Top 20 Brands in On Prem MAT

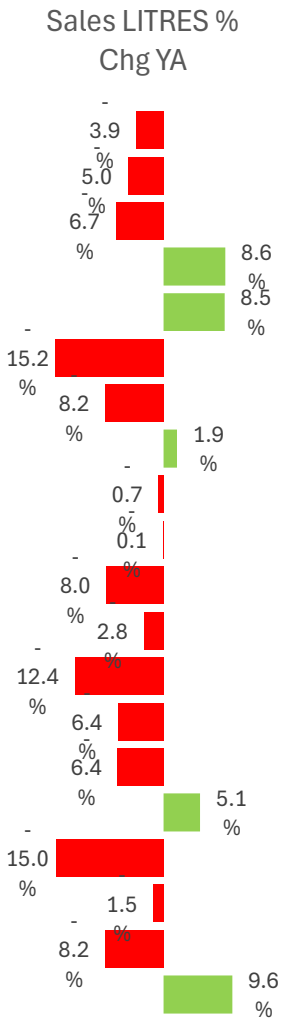












Source: Nielsen GTC MAT w.e. 31.07.26