



E-Commerce in Soft Drinks

April 2024

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SOFT DRINKS ONLINE: PERFORMANCE IN 2023

Scope

Surging global soft drinks e-commerce sales in 2023, driven by higher US prices

Soft drinks online generally follow a familiar seasonal pattern of consumption

Global giants Coca-Cola Co and PepsiCo contend with a fragmented online shelf

Grocery leads overall, but Amazon and online marketplaces drive emerging functional brands

PRICE INFLATION AND VALUE SEEKING IN ONLINE SOFT DRINKS

Price rises, package mix and premium category preferences drive value performance

Multipack options online are shrinking, further driving value per litre

Private label bottled water and juice perform well in online grocery e-commerce

FUNCTIONAL CATEGORIES AND FORMAT POWER MARKETPLACES

Functional demand fuels performance of concentrates, sports and energy drinks

Unilever's Liquid IV electrolyte mix has emerged as an e-commerce leader within soft drinks

Hydration, sports nutrition and convenience emerge as e-commerce priorities in drinks

Prime (Congo Brands) establishes a new blueprint for online brand building

VIRAL POWER AND DISRUPTION

Rapid growth of Douyin as a soft drinks retailer underscores the potential for US TikTok Shop

TiQ prune juice: A cautionary example of viral wellness fads driven by online marketplaces

Soft drinks retailer profile: Target (US) top performers point to wider functional momentum

Soft drinks online: Recommendations in 2024

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