

# Global Soft Drinks in 2022: Alternative Approaches to Sugar Reduction

February 2022

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## INTRODUCTION

Scope

What is this report about?

## MOVING THE NEEDLE ON SUGAR CONSUMPTION

Is the soft drinks industry finally moving the needle on sugar?

Several factors have yielded declines in estimated sugar from retail soft drinks globally

Consumer sugar avoidance in beverages is growing - and is higher than foods

Action in 2021/2022: Poland and Spain push forward new tax increases on SSBs

Sugar reduction and the post-pandemic consumer

What do we mean by tax alternatives?

## LIMITING ACCESS AND VISIBILITY TO SUGAR-SWEETENED BEVERAGES

Legislation limiting access to sugar moves ahead , beginning in Oaxaca

Is self-regulation enough to limit access to sugar-sweetened drinks?

2022: more restrictions across institutional channels, workplaces and foodservice menus

Future channel restrictions modelled on tobacco and alcohol industries

Restricting the public profile of beverage brands via event marketing and sponsorship

## WARNING LABELS AND PLAIN PACKAGING

Nutrition-specific labels vs indicator-based labels to inform consumers

Stop sign front labelling is used as a model for Latin America, although impact is mixed

The role of embedded brand equity in a plain packaging world

Tobacco's plain packaging and health warnings: a model for the future?

Quantifying the impact of plain packaging on beverage category value

Smaller portions, smaller package sizes and higher margins

## SUGAR REDUCTION THROUGH PACKAGE-FREE AND FUNCTIONAL OCCASIONS

Growth in countertop beverage preparation could also yield declines in sugar per serving

As functionality replaces refreshment, sugar may no longer be the most important ingredient

The role of sugar in soft drinks will change with the consumer's mission

Conclusion

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