

# FOCUS ON

Sports & Energy

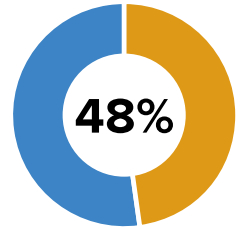
Web App Guides In Store In Depot

# POWER UP your sales



POWER ADE | Premier League

OFFICIAL PARTNER



48% of all Sports & Energy growth has come from Symbols & Independents.<sup>1</sup>



Sports & Energy is forecast to drive 50% of Soft Drinks growth by 2030.<sup>2</sup>



NPD has added **£580m** to the Sports & Energy category since 2022.<sup>3</sup>

1. Nielsen Discover – Total Soft Drinks (Indies & Symbols vs Total Coverage), 52 WE 29/12/2025
2. Nielsen S&I Wholesale Channel Projection 2026-2030
3. NIQ RMS data to 01.11.2025. Total Value Sales of all NPD launched post WE 29.10.2022

# WIINGS FOR YOUR SUMMER.



NEW



**Red Bull**

VITALIZES BODY AND MIND<sup>®</sup>.

# FOCUS ON

## Sports & Energy

 Web 
  App 
  Guides 
  In Store 
  In Depot

### Dear Retailer,

The 'Focus On' guides by Plan for Profit are specifically designed for the independent retailer. Each guide contains expert product and category insight to help you make the most of opportunities in store and meet the needs of your customers.

In this guide, we explore the dynamic Sports & Energy category in Symbols and Independents. As the largest category in Soft Drinks, Sports & Energy is forecast to drive **50%** of total category growth by 2030.

This issue highlights category performance, key opportunities for retailers, must-stock bestsellers, and a showcase of our NPD big bets for 2026.

All copies of the Focus On Guides are available to review on the Plan for Profit website and app. Visit [planforprofit.co.uk](http://planforprofit.co.uk) or search 'Plan for Profit' in your preferred app store.



Mark Langohr  
Category Controller

### DEDICATED TO THE INDEPENDENT RETAILER



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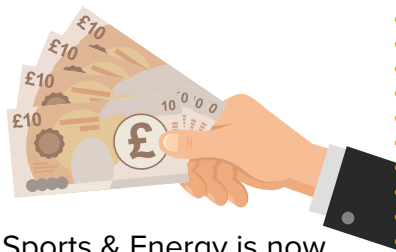
View focus on guides here



## KEY INSIGHTS



Soft Drinks makes up **8%** of all store sales in Convenience.<sup>1</sup>



Sports & Energy is now a **£1bn+** category.<sup>2</sup>



Single serve dominates Sports & Energy, delivering **95%** of category sales.<sup>2</sup>



Single serve is growing faster than multipacks (**+12% vs +4%**).<sup>2</sup>



Red Bull leads the category (**£362m**), with Monster close behind (**£350m**).<sup>2</sup>



Innovation is driving growth, with **£580m** added from NPD since 2022.<sup>3</sup>

1. ACS Local Store Report 2025  
 2. Niesen Discover Total Soft Drinks (Indies & Symbols) – 52 WE 29/12/2025  
 3. NIQ RMS data to 01.11.2025. Total Value Sales of all NPD launched post WE 29.10.2022



# THE ENERGY RANGE THAT POWERS YOUR PROFITS



STOCK UP ON NEW  
BIGGER 500ML CANS  
NOW AVAILABLE



RETAILERS BENEFIT  
FROM UP TO  
**47% POR**

OWN BRAND IS NOW A **TOP 3 PERFORMER** IN THE SPORTS & ENERGY CATEGORY



**FUEL THE MOMENT**

# MARKET OVERVIEW

Soft Drinks are thriving in Symbols and Independents, outperforming the total market as shoppers increasingly turn to convenience for on-the-go and top-up purchases.

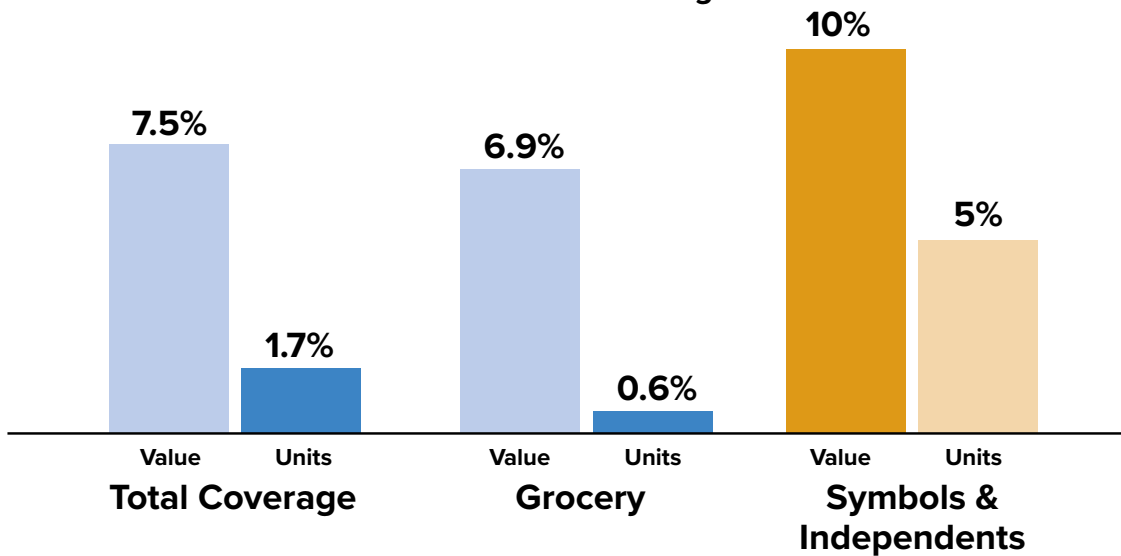


The category is now worth **£2.5bn**, up **10%** vs last year.<sup>1</sup>



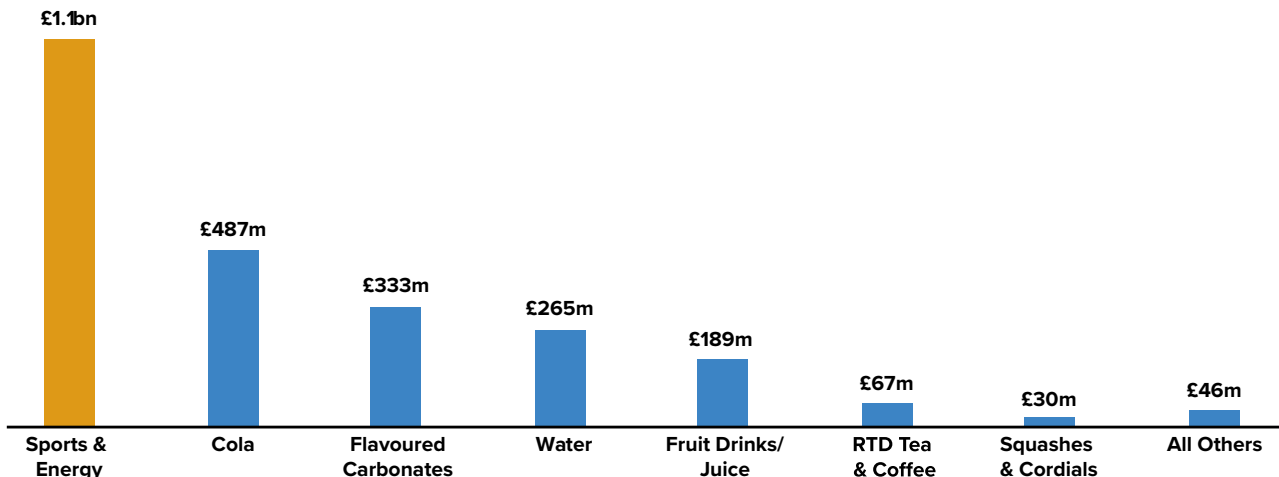
Volumes reached **1.6bn** units, up **5%** vs last year.<sup>1</sup>

## Market Sales % Change<sup>1</sup>



Within Soft Drinks, Sports & Energy is now worth **£1.1bn** in Symbols and Independents and is twice the size of Cola, confirming it as a key driver of today's market.<sup>2</sup>

## Value Sales Per Sector



1. Nielsen Discover Soft Drinks (Total Indies & Symbols) – 52 W/E 22nd November 2025

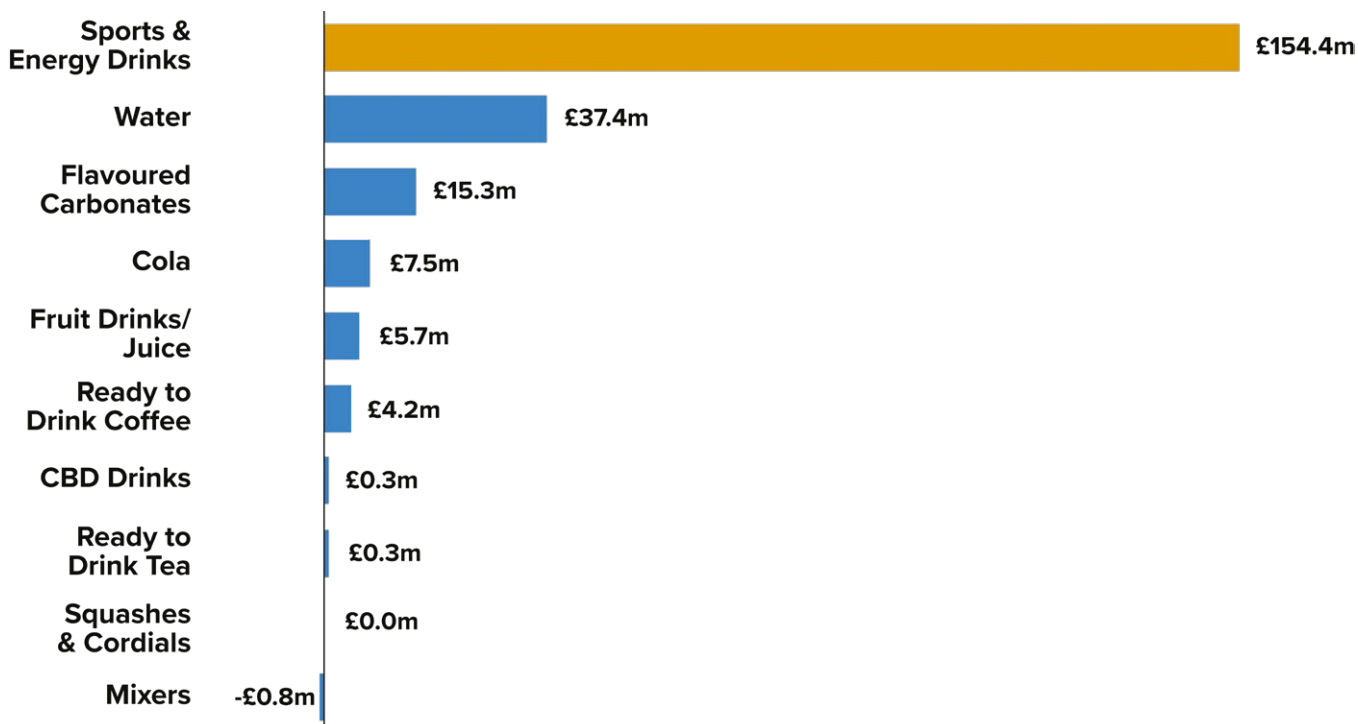
2. Nielsen Discover Indies & Symbols (Total Soft Drinks) – 52 W/E 15th January 2026

# CATEGORY PERFORMANCE

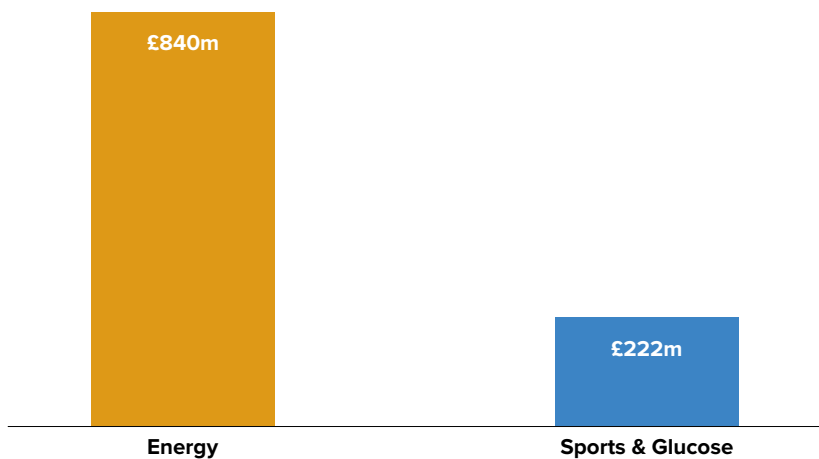


Sports & Energy is the **number one** value growth driver in Symbols and Independents, so getting range, availability and space right can unlock significant sales and profit growth.<sup>1</sup>

## Sales Value YoY Change

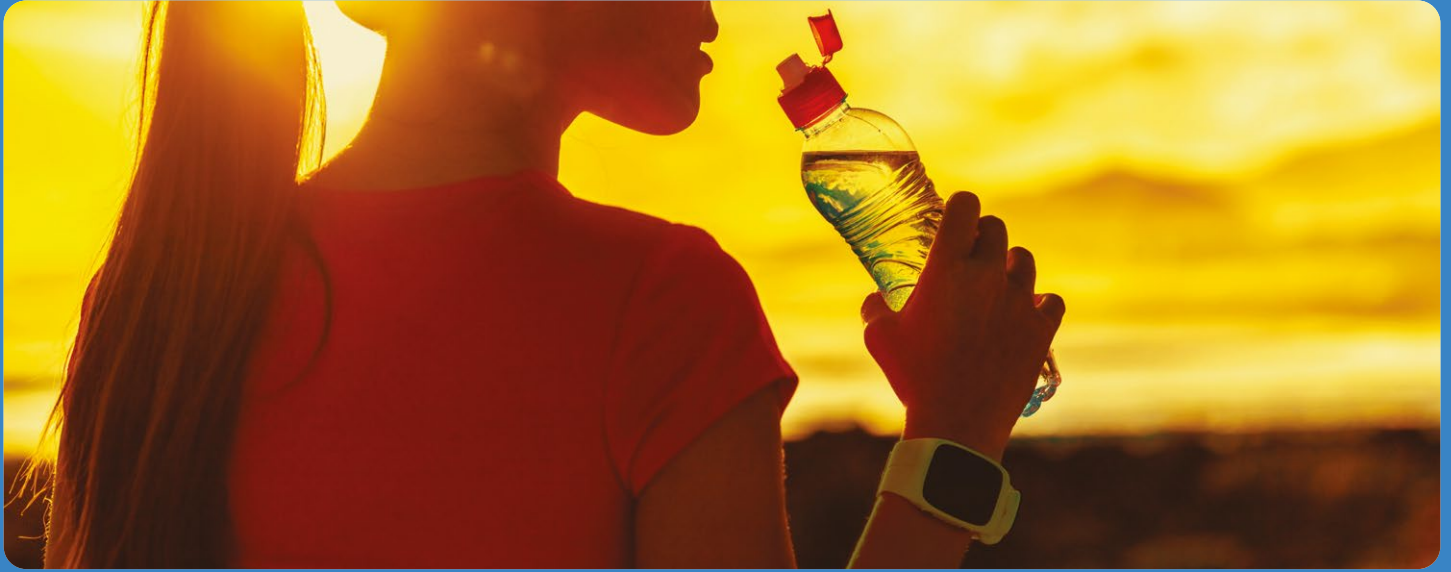


## Sports & Energy Annual Sales



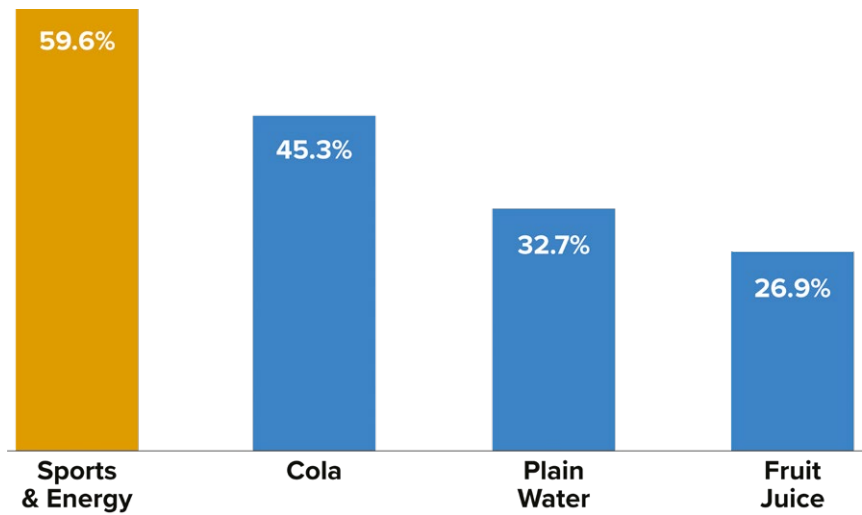
Energy makes up the majority of Sports & Energy sales, highlighting sustained demand for functional, high-energy drinks, particularly in single serve formats that deliver a strong rate of sale.<sup>1</sup>

1. Nielsen Discover Indies & Symbols (Total Soft Drinks) – 52 W/E 15th January 2026

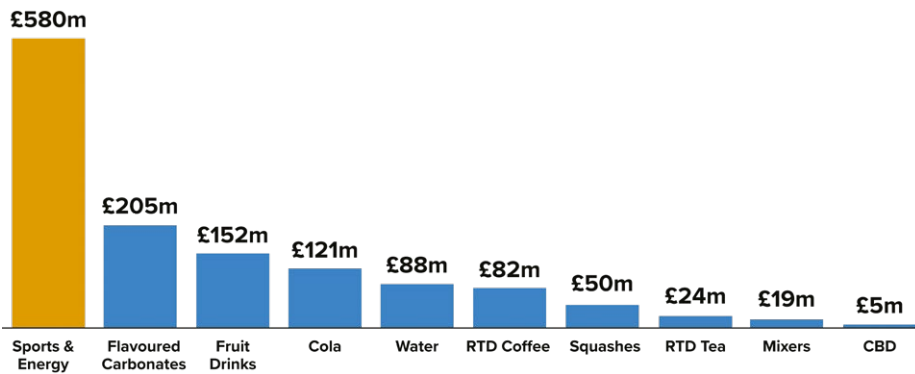


### Share of Shoppers Only Buying 1 Brand

Brands matter more in Sports & Energy than any other soft drinks segment, so stocking a strong core range of best sellers and merchandising for visibility is key to driving sales.<sup>2</sup>



### NPD Sales Contribution Since 2022 | Total GB



Innovation continues to drive growth. Since 2022, Sports & Energy has delivered more NPD sales than any other Soft Drinks segment, with new flavours attracting shoppers into the category.<sup>3</sup>

2. Kantar Take Home Panel, 52 w/e 07 July 2025

3. NIQ RMS data to 01.11.2025. Total Value Sales of all NPD launched post WE 29.10.2022

# BRING THE ENERGY TO YOUR SALES

LUCOZADE ENERGY ORANGE is the **BEST SELLING** flavoured energy product on the market \*

LUCOZADE SPORT accounts for **66%** Of the sport drink category\* \*



Vitamin B3 helps reduce tiredness and fatigue. Lucozade Sport provides carbohydrates and electrolytes to enhance hydration and help maintain performance during prolonged endurance exercise. LUCOZADE, LUCOZADE SPORT, LUCOZADE ENERGY and the Arc Device are registered trade marks of Lucozade Ribena Sunitory Ltd. ©Lucozade Ribena Sunitory Ltd. All rights reserved. \*\*Recommended Retail Price Only. \*(Nielsen Total Coverage, £Sales, MAT to 22nd Nov25) \*(Nielsen Total Coverage Unit Sales MAT to 22nd Nov25)



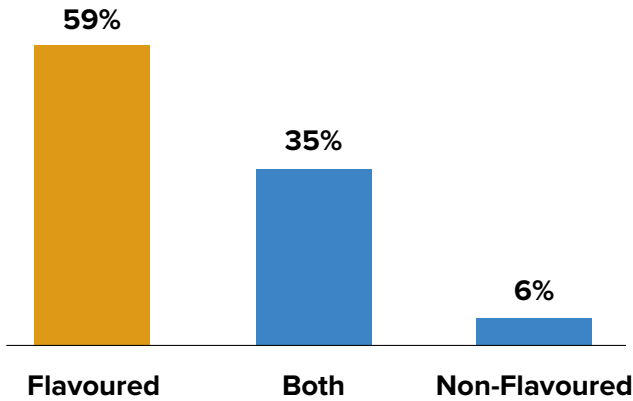
# CATEGORY PERFORMANCE



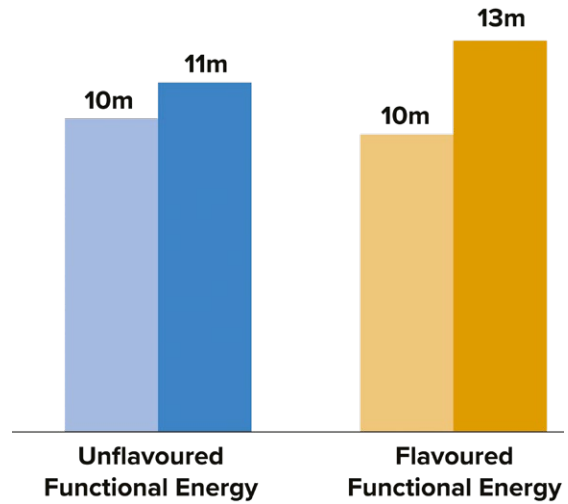
Flavour is key to expanding Energy's appeal. Retailers can recruit new shoppers by stocking the latest NPD and staying ahead of emerging flavour trends.



**Non Energy Drink Buyers  
% That Would Consider<sup>1</sup>**

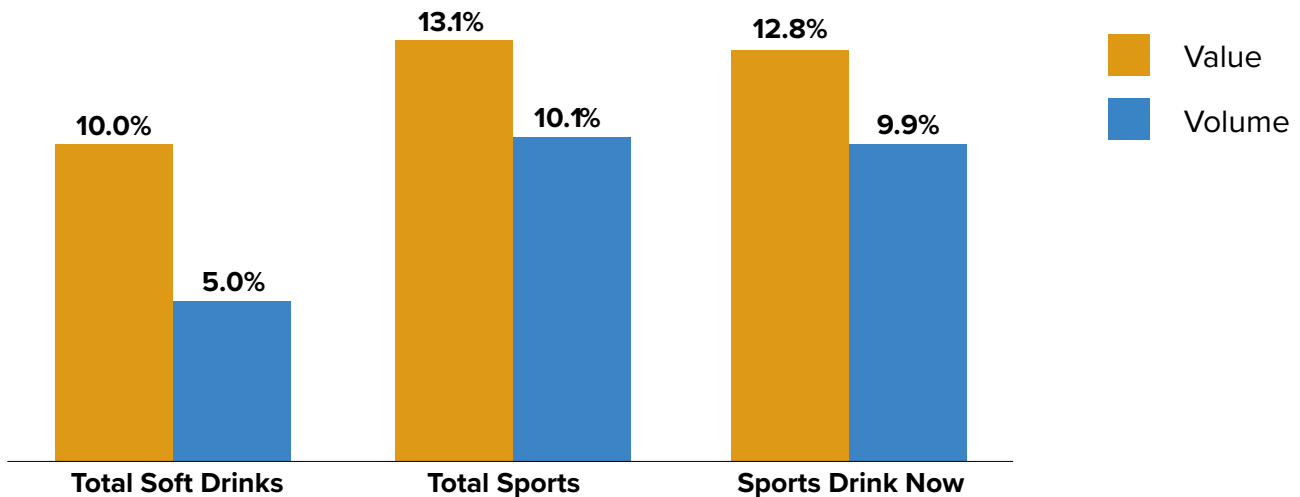


**Shopper Numbers 2022 vs 2024<sup>1</sup>**



Sports is outpacing total Soft Drinks, delivering stronger growth in both value and volume and highlighting rising shopper demand for functional hydration in convenience.<sup>2</sup>

**Symbols & Independents Performance**



Sports is being driven by both 500ml and 750ml formats, with each serving different consumption occasions and shopper needs.<sup>2</sup>



Sport 500ml  
**+8.3% (+£8.2m)**



Sport 750ml  
**+414% (+£5.4m)**

1. ED Shopper Value Sensor and Appinio Research 2022 – 2024

2. Nielsen IQ GB Total Market, Independents & Symbols, 52 week value & volume w/e 27/12/25

# RAW IS THE 3<sup>rd</sup> BIGGEST FLAVOURED BIG CAN ENERGY BRAND



Circana | Market | Volume | Total Stimulant Energy |  
12 w/e 16th November 2024

## BOOST



# NEED TO *power* THROUGH?

**#3 ENERGY  
STIMULATION BRAND\***

**#2 SPORTS  
DRINK BRAND\***

**THE ONLY BRAND  
WITH A FORMAT  
FOR ALL OCCASION**



Source: Circana S&I GB and Convenience NI 52w/e unit sales data to 04/01/25.  
Total brand growth IRI All outlets 52w/e 04/01/25

# WINNING IN ENERGY

We have a clear understanding of the shifting consumer and shopper behaviours reshaping the energy category.

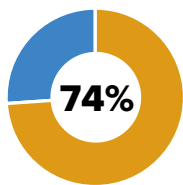


## RECRUIT

New, younger consumers are entering the category, traditional energy remains king, but zero is growing in importance.



**32%** of consumers are new to the Energy category (16–24s lead).



**74%** of consumers' first Energy purchase is Traditional Energy.



**44%** of recent drinkers are entering the category through Zero Sugar.

## REPEAT

Energy consumption is becoming more frequent as the range of occasions increases.



**79%** of consumers drink Energy weekly or more often; 28% drink 4x+ per week.



**+6%** increase in Energy consumption frequency vs 2022, driven by new shoppers.



4 occasions on average drive Energy consumption.

## RETAIN

Offering the shopper choice, innovation and value is important.



**47%** of Energy shoppers want range and are 3x more likely to buy with NPD.



**34%** wouldn't buy a drink if their preferred Energy brand wasn't available.

**57%** of Energy shoppers look for promotions in store.

**Buy 2 for £**

# GIVE YOUR SALES A REFRESHING LIFT

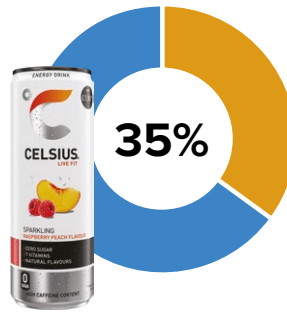
**NEW**



Tropical flavours  
of energy drinks are  
**GROWING +12%**  
year on year\*

**ViMTO ENERGY**  
is a star performer  
in energy drinks,  
**GROWING +31%\***

# CORE VS NPD



NPD is essential for growth, generating **£73m** last year and driving **35%** of total soft drinks category growth.<sup>1</sup>

However, the core remains critical, with **£133m** in growth from the top 5 brands.<sup>1</sup>



PLAN FOR  
PROFIT  
**TIP**

Balance is key. Create space for innovation and newness while protecting the core ranges that underpin success.



## Sports & Energy New Product Launches 2026



**Monster Viking Berry  
500ml PMP**  
Available: February 2026



**Lucozade Grafruitti  
Zero PMP**  
Available: April 2026



**CELSIUS Energy PMP**  
Available: January 2026

1. Nielsen S&I Wholesale Channel Analysis 52w to Oct 2025

# THE BRAZILIAN ORIGINAL



100-year-old BRAND

made with real guaraná FROM THE amazon.



feel the brazilian rhythm in every sip

TOP #15 SOFT DRINK WORLDWIDE  
#1 Guaraná IN THE WORLD

## Explore ways to Plan for Profit



Market Insight



Range Advice



NPD



Retailer Tools



Business Advice



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# BEST SELLERS



monticello - stock.adobe.com



**Red Bull**  
Original

250ml



**Red Bull**  
Original

355ml



**Red Bull**  
Original

473ml



**Monster**  
Original

500ml



**Monster**  
Mango Loco

500ml



**Monster**  
Pipeline Punch

500ml



**Monster**  
Ultra Zero

500ml



**Lucozade Sport**  
Orange

500ml



**Lucozade Sport**  
Raspberry

500ml



**Lucozade Energy**  
Orange

500ml



**Lucozade Energy**  
Original

500ml



**Lucozade Energy**  
Orange

900ml



**Red Bull**  
Original

4 x 250ml



**Monster**  
Original

4 x 500ml



**Lucozade Sport**  
Orange

4 x 500ml

# INTRODUCING EMERGE

CARIBBEAN STYLE



LAUNCHING  
MARCH  
2026