



TREATT

**TOP 10
FASTEST
GROWING**

Flavours

Part 1: Flavoured Waters

2022

WHAT'S YOUR FLAVOUR?

This report gives a brief overview of the top flavours globally, looking specifically at flavoured waters.

Our research has included extensive data gathering with GlobalData and Mintel. All statements, facts and figures in this report are validated and verifiable.

TOP TAKEAWAYS OF THE GLOBAL BEVERAGE MARKET

- Citrus continues to command a place in the top 5 beverage flavours globally.
- One of the defining megatrends driving growth and purchasing behaviour remains health and wellbeing. However, concern for the health of the planet is now the top concern for many consumers and there are signs of a new consciousness among consumers in taking personal action on the environment.
- The growing importance of natural ingredients is highlighted in a report by Fior Markets in May 2021, which reports that the 'global organic food and beverages market' is expected to grow from USD 255.2 billion in 2020 and to reach USD 849.7 billion by 2028, growing at a CAGR of 16.42% during the forecast period 2021-2028.
- Flavoured water is one of the standout growth categories for both volume and value to 2024 as forecast by GlobalData.
- Supply chain transparency will only become more important as ingredient provenance comes under increasing scrutiny - GlobalData report that 85% of consumers globally say that information on what is in their food and drink is of major importance to them.
- Across key markets value is forecast to outpace volume growth to 2024 which speaks to the premiumisation trend we see continuing to evolve.

It is a fast-moving landscape but a very exciting time for the beverage industry globally.

Here are a few highlights from around the world, looking at flavoured water.

NORTH AMERICA

With a strong presence in retail, the category benefited from at-home lifestyle changes due to the pandemic.

In 2022, the annual growth is anticipated to be lower as consumers move towards enhanced waters for their functional benefits. Flavoured water sales are expected to continue recording a healthy growth in the long term, led by the sparkling segment, which is opted as a healthier beverage alternative without compromising on flavour.

UK

Enhanced water is projected to grow by 3% in 2022. This will primarily be achieved through on-premise consumption as hotel/restaurant/catering (HoReCa) operations return to pre-pandemic levels.

The recovery of tourism will also contribute to growth. The category's long-term growth will likely be driven by new flavour innovations and strong marketing activities. The growing health and wellness trend continues to influence the sector as consumers shift towards healthier drinks and preferred low-calorie and low-sugar variants.

EUROPE

Flavoured water consumption is growing, typically highest among Millennials, 68% of whom report having drunk it recently in Germany. In France, 38% of adults consider flavoured water a 'healthy option' and this growing health consciousness among the population will increase the flavoured water category's popularity allowing it to register annual growth by 2.1% in 2022.

In Italy in 2022, the category's annual volume will grow by 8.1%, with consumers' interest in lighter and healthier beverages expected to continue growing. In the long term, the category is expected to grow, owing to the positive perception of these beverages as healthier alternatives to sugary drinks.

CHINA

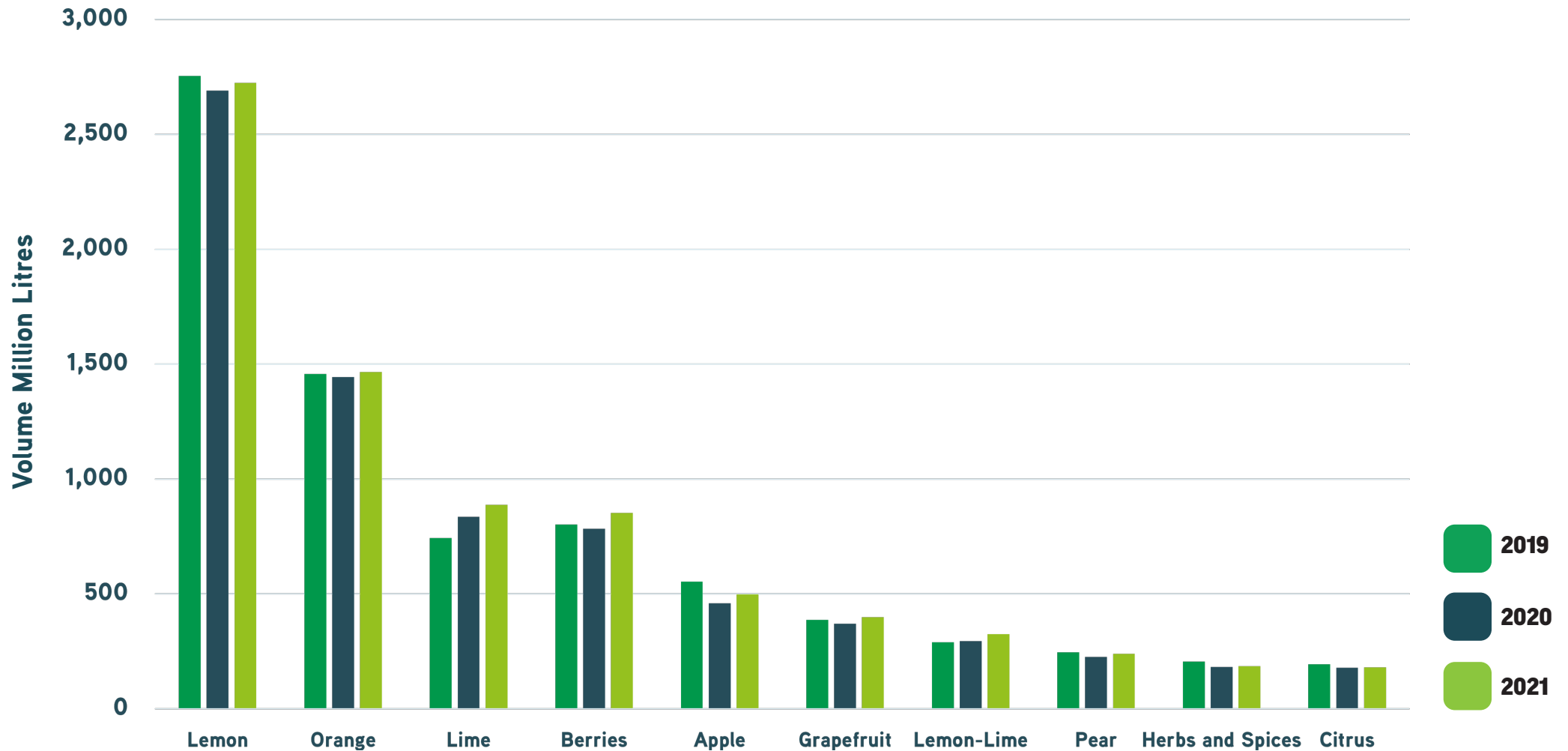
Heightened health focus supported category growth. Consumption of flavoured water at HoReCa outlets, such as high-end restaurants, night clubs, and private clubs, recorded strong growth in the quarter, which boosted value growth.

In 2022, the category's annual volume will grow by 8.8%. Consumers' growing interest in health and wellness will support category volumes in the year. In addition, low-calorie products, with attractive flavours, will continue to gain consumer attention in 2022.

The long-term forecast of the category is bright as the category is likely to have new flavour launches in the coming years, which will attract a larger consumer base.

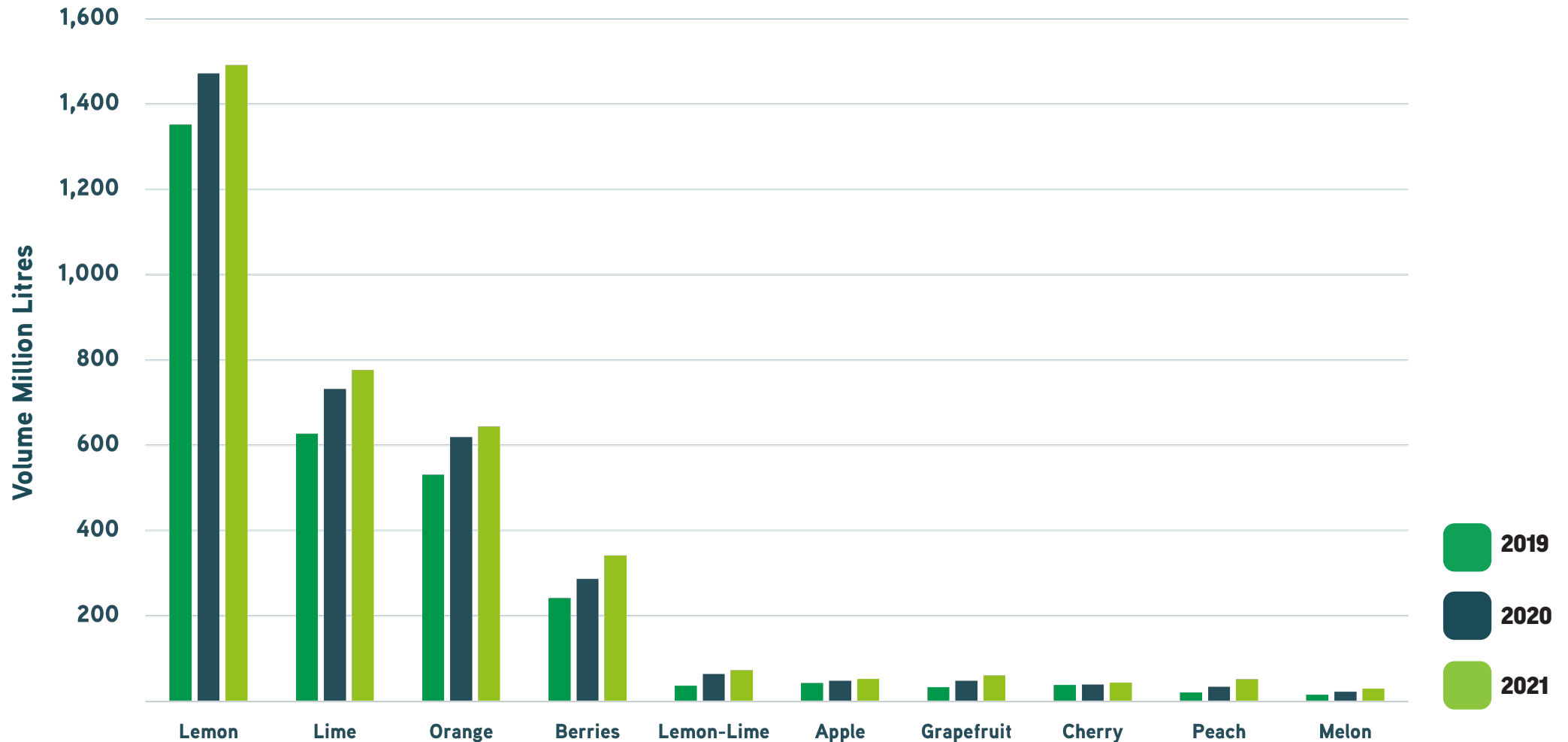
TOP 10 FLAVOURS GLOBALLY: FLAVOURED WATER

Volume 2019 - 2021



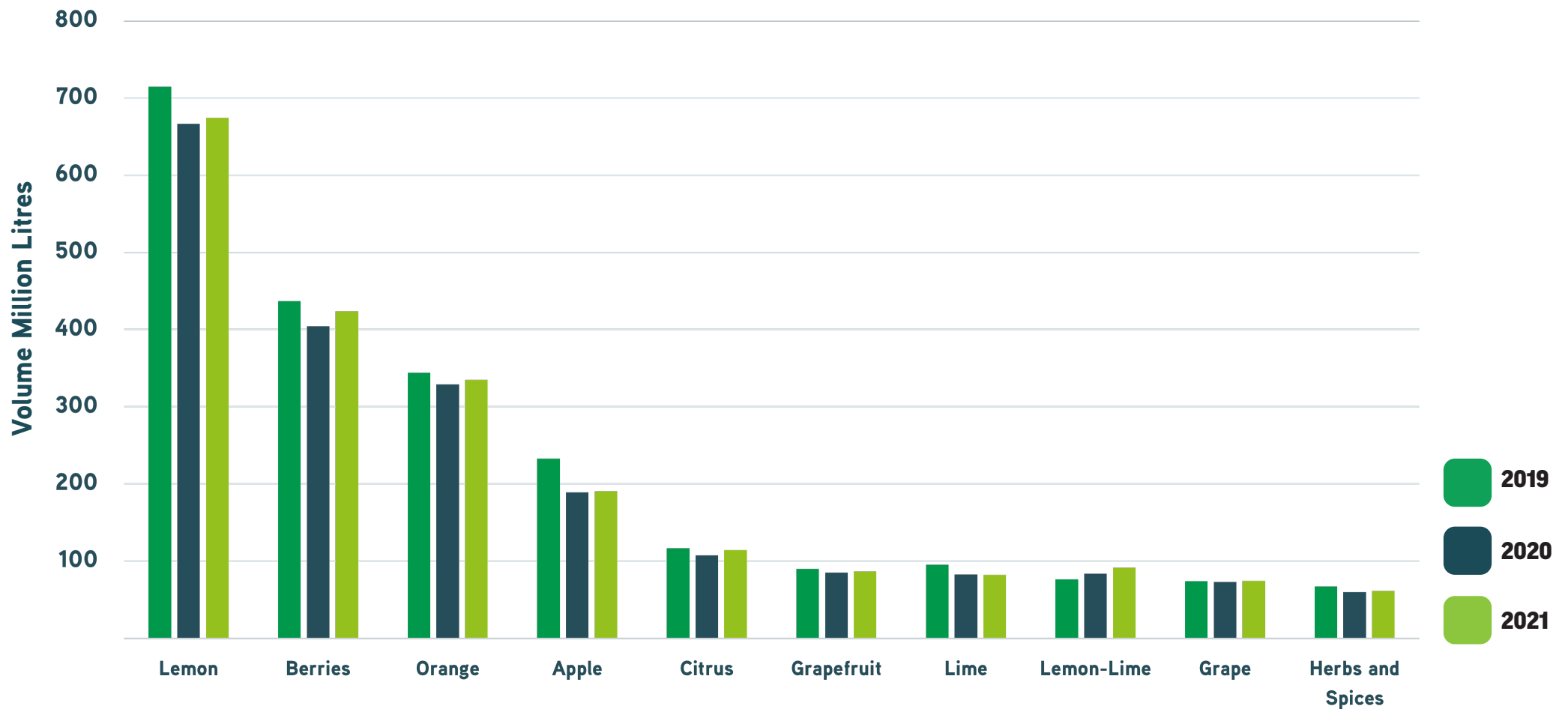
TOP 10 FLAVOURS - NORTH AMERICA: FLAVOURED WATER

Volume 2019 - 2021



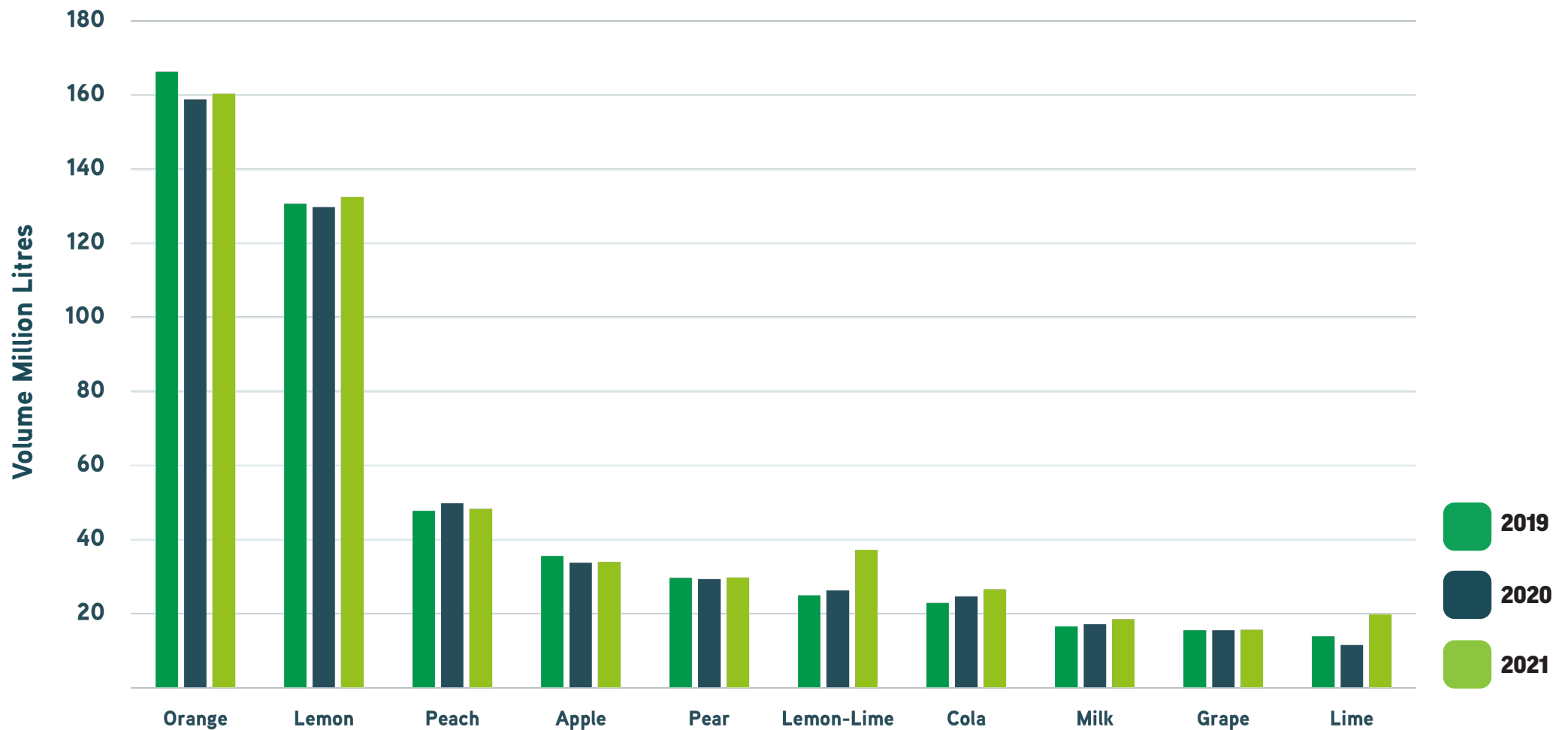
TOP 10 FLAVOURS - EUROPE: FLAVOURED WATER

Volume 2019 - 2021



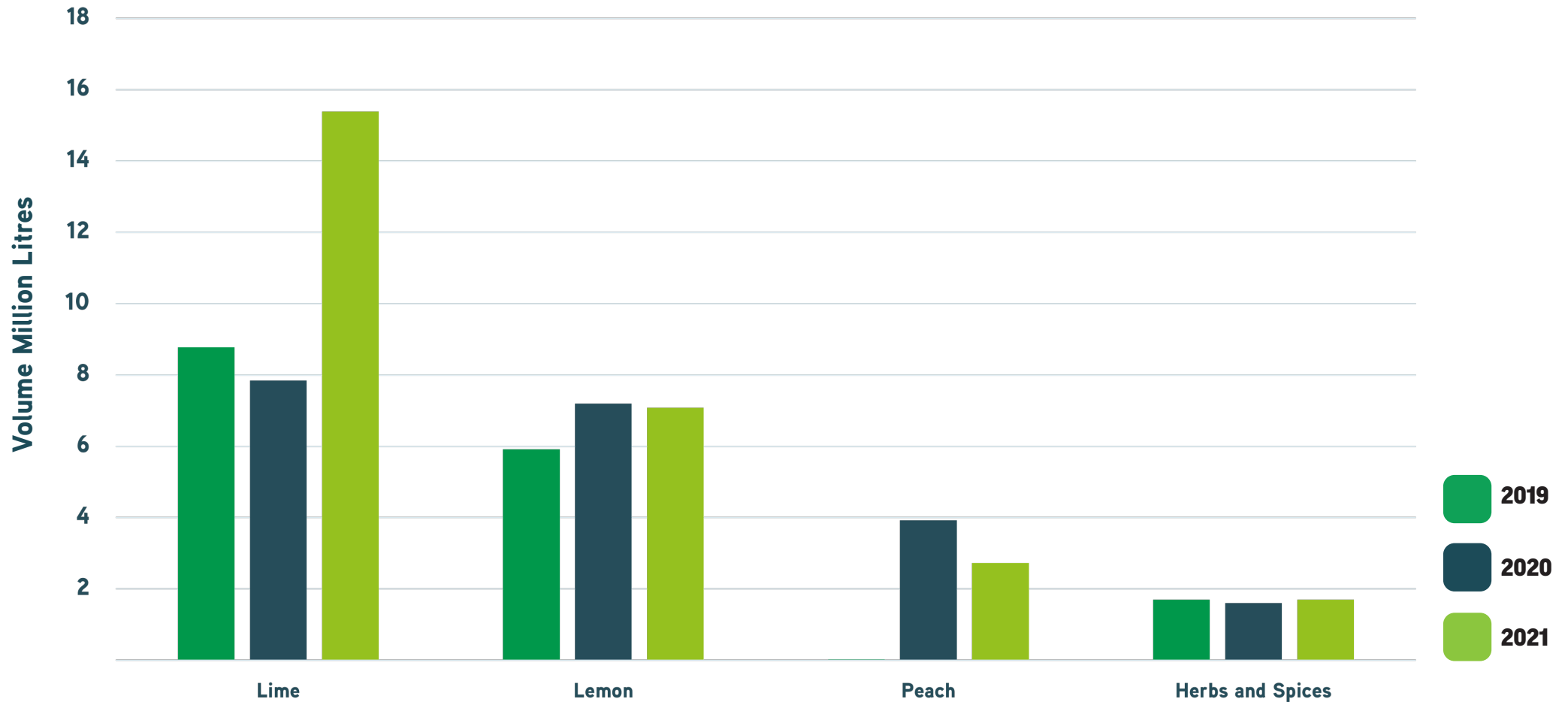
TOP 10 FLAVOURS - APAC: FLAVOURED WATER

Volume 2019 - 2021



TOP 4 FLAVOURS - CHINA: FLAVOURED WATER

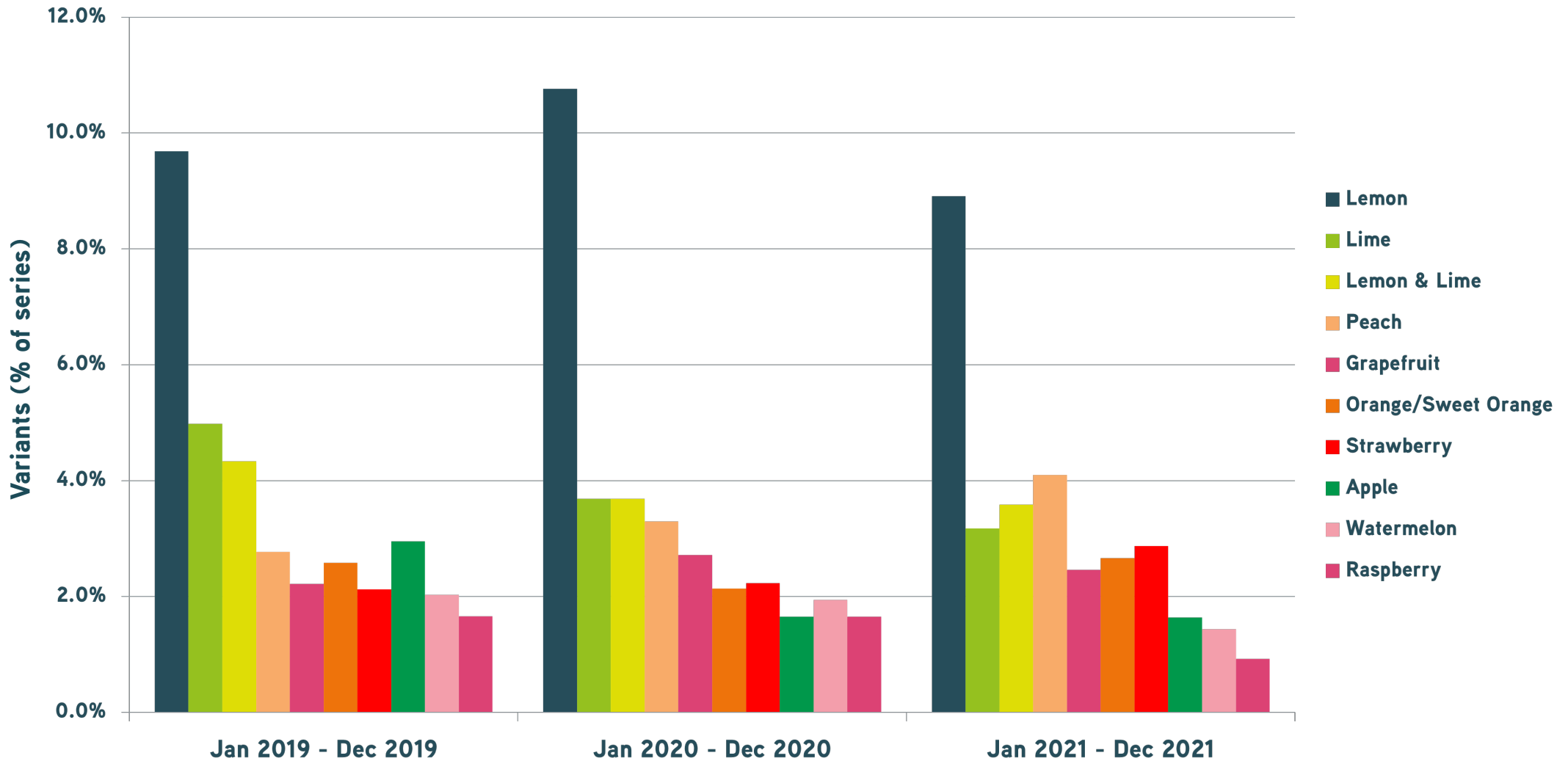
Volume 2019 - 2021



TOP 10 FLAVOURS BY % GLOBALLY: FLAVOURED WATER

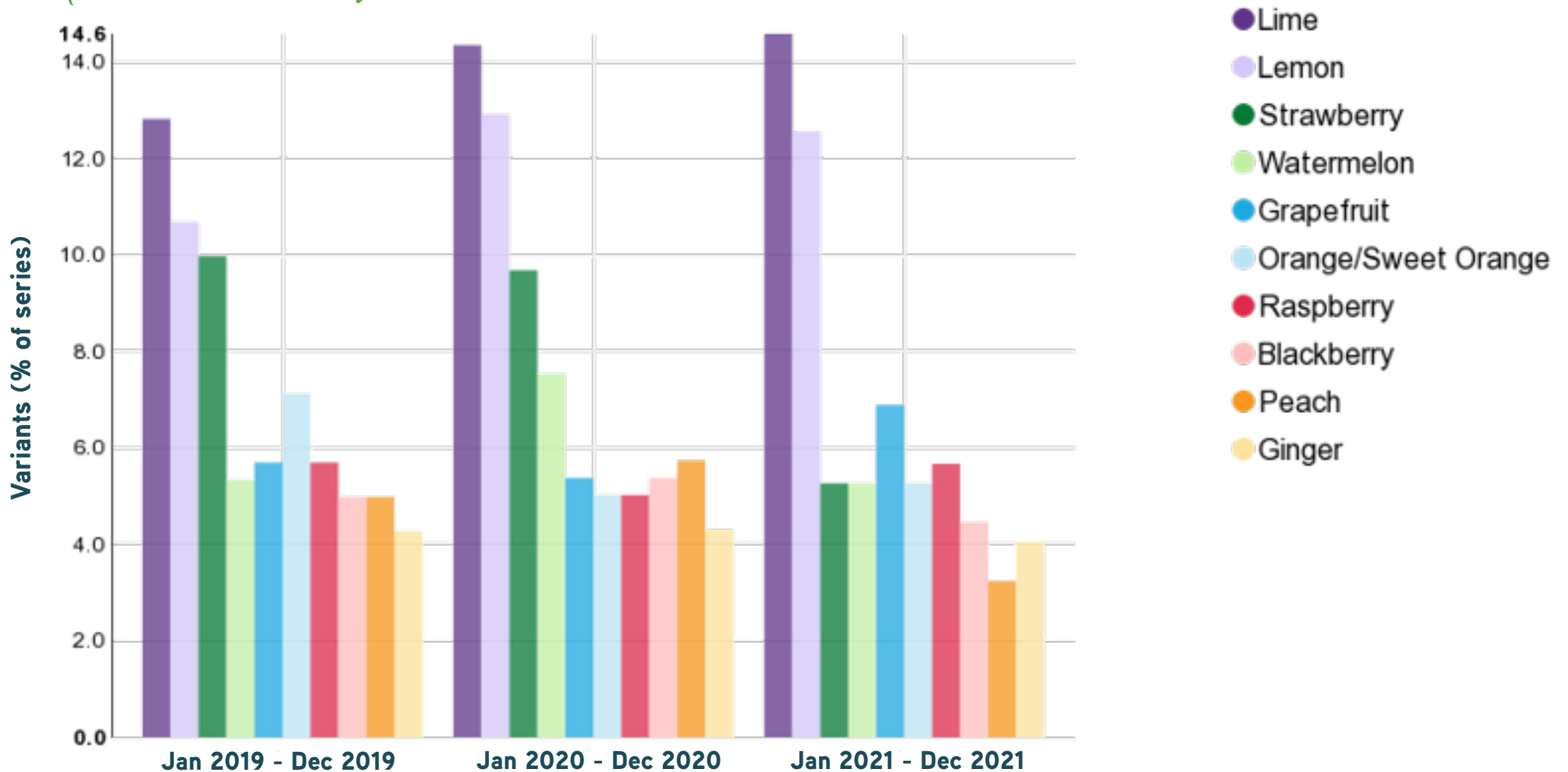


New Product Launches 2019 - 2021



TOP 10 FLAVOURS BY % - NORTH AMERICA: FLAVOURED WATER

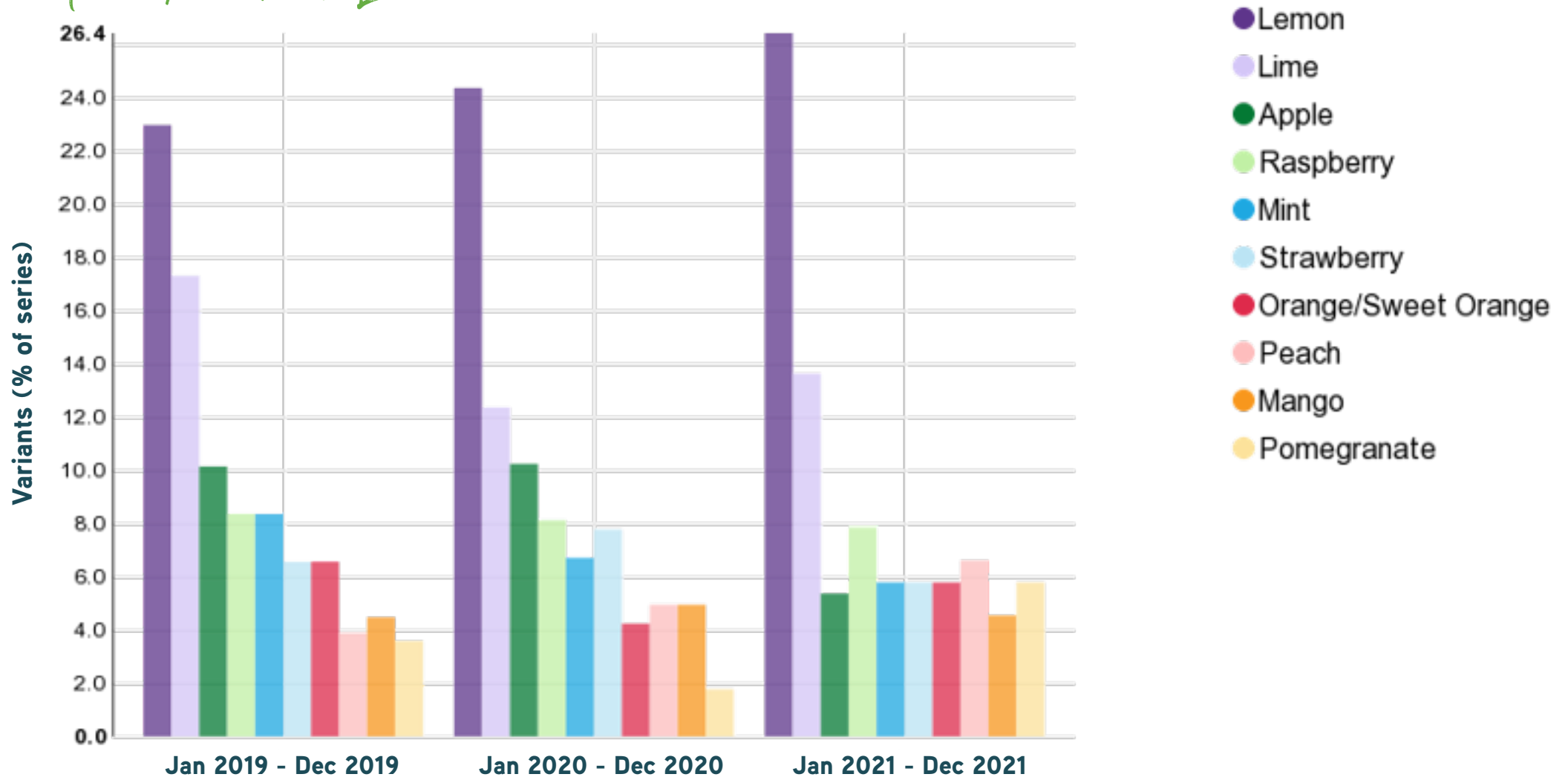
New Product Launches 2019 - 2021



TOP 10 FLAVOURS BY % - EUROPE: FLAVOURED WATER

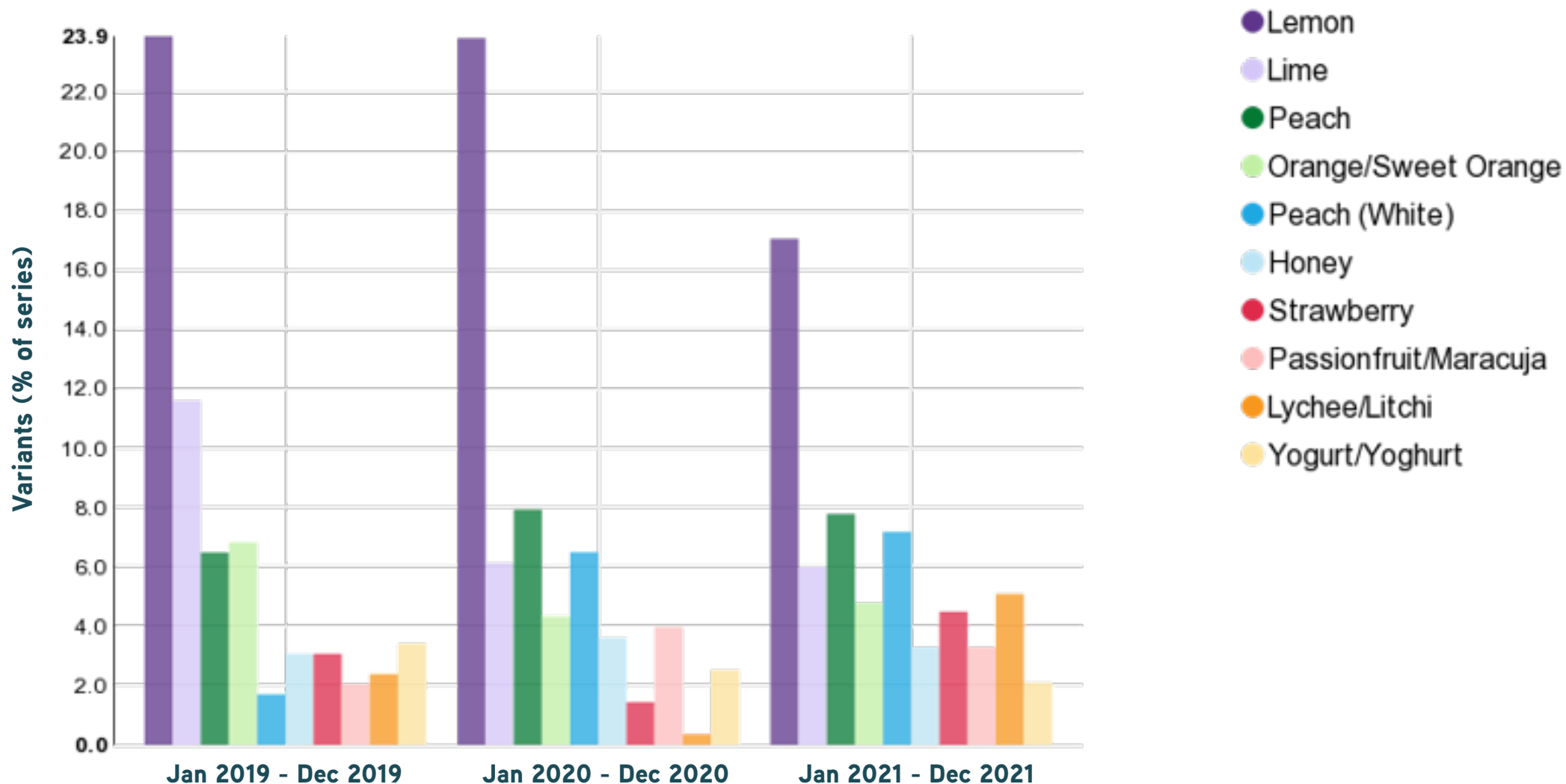
New Product Launches 2019 - 2021

EUROPE



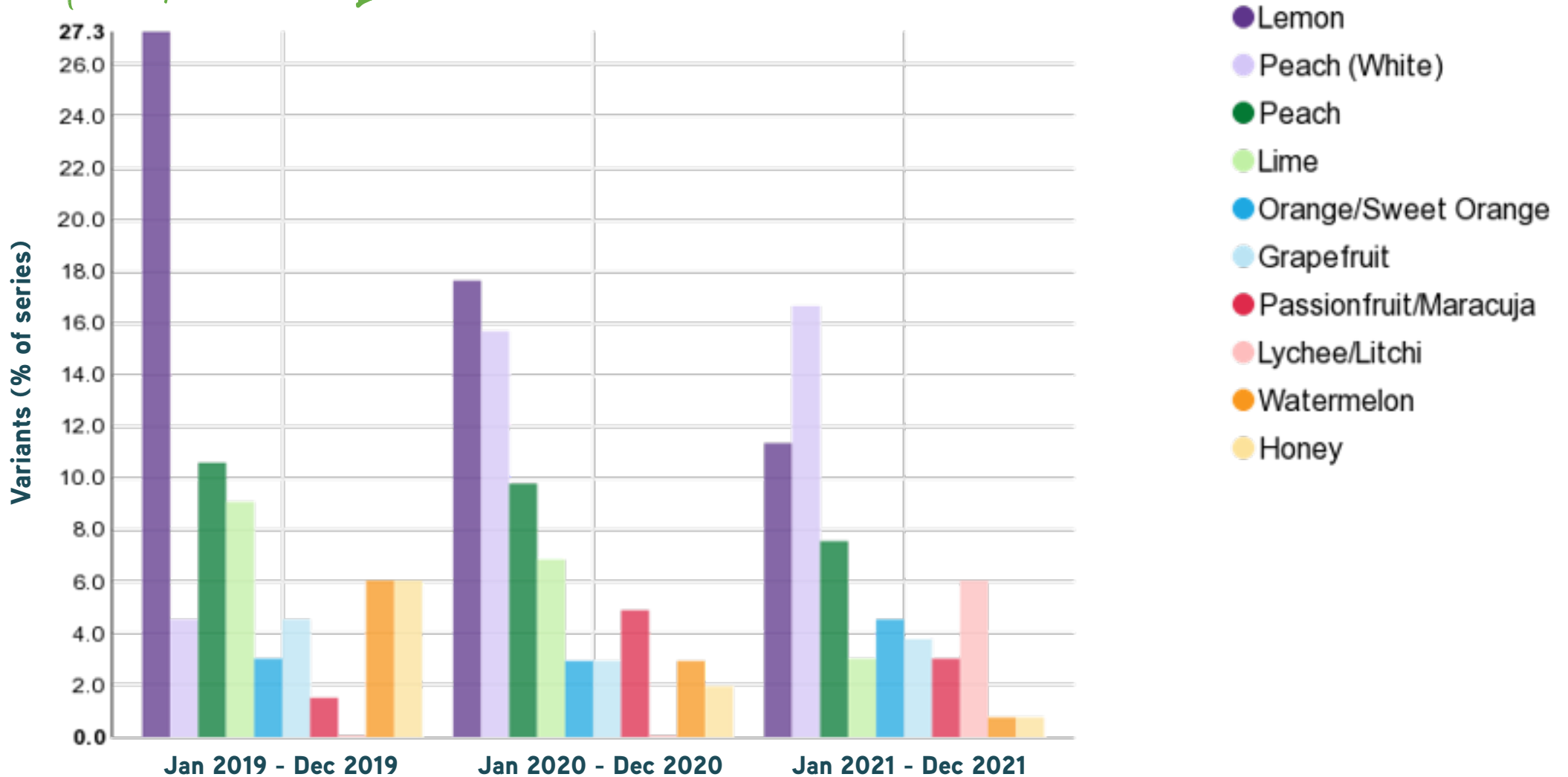
TOP 10 FLAVOURS BY % - APAC: FLAVOURED WATER

New Product Launches 2019 - 2021



TOP 10 FLAVOURS BY % - CHINA: FLAVOURED WATER

New Product Launches 2019 - 2021



OUR GROWING TREATTCLEAR™ CITRUS RANGE



**THE CLEAR
CHOICE IN**
Clean Label

REFRESHINGLY AUTHENTIC CITRUS PROFILES

Increasingly health-conscious consumers want great tasting beverages which meet their wellbeing needs and deliver on that fresh, authentic citrus experience.

Our portfolio of natural extracts is growing with the introduction of refreshing new TreattClear™ citrus extracts.

- Citrus continues to be a top trending ingredient globally, driven by increasingly health-conscious consumers
- TreattClear™ citrus range delivers impactful and authentic profiles that are true to the fruit, From The Named Fruit (FNTF), with an effective cost in use
- TreattClear™ citrus products are water soluble and clean label, performing in a variety of applications; still, sparkling, alcoholic and non-alcoholic
- New, thriving flavours such as tangerine, Sicilian blood orange, and Mexican key lime as well as firm favourites like orange, lemon and grapefruit
- The impact and performance of these citrus extracts is best tasted for yourself.

[Book your demo](#) and sample the refreshing taste of TreattClear™ or [contact us](#) about an onsite working session to develop a custom blend.

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