



2026 TASTE TRENDS

European Soft Drinks



IN THIS REPORT

This report, created with support from Innova, we take a look at key trends in the soft drinks category including: flavoured water, energy drinks and functional drinks across Western and Eastern Europe.

Covering the last 3 years, we highlight emerging ingredient trends and product claims, giving a clear picture of what's shaping the 2026 market and what consumers are looking for.



2026 TRENDS

Health and wellness remains a key driver in soft drinks, with growing demand for functional benefits like immunity or gut health. Natural ingredients and low-sugar claims will continue to shape innovation in the year ahead.

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TOP FLAVOURS

Consumers are prioritising health and wellbeing, often choosing natural and low-sugar options. At the same time, there is growing interest in functional flavours inspired by wellness trends such as botanicals, superfruits, and adaptogens.



EXPERT CALL OUT

The challenge in 2026 isn't just creating great-tasting drinks, it is creating them with purpose. Consumers are expecting more from their beverages: more functionality and a stronger sense of authenticity.

28%

of new flavored bottled water launches carry functional claims

#1

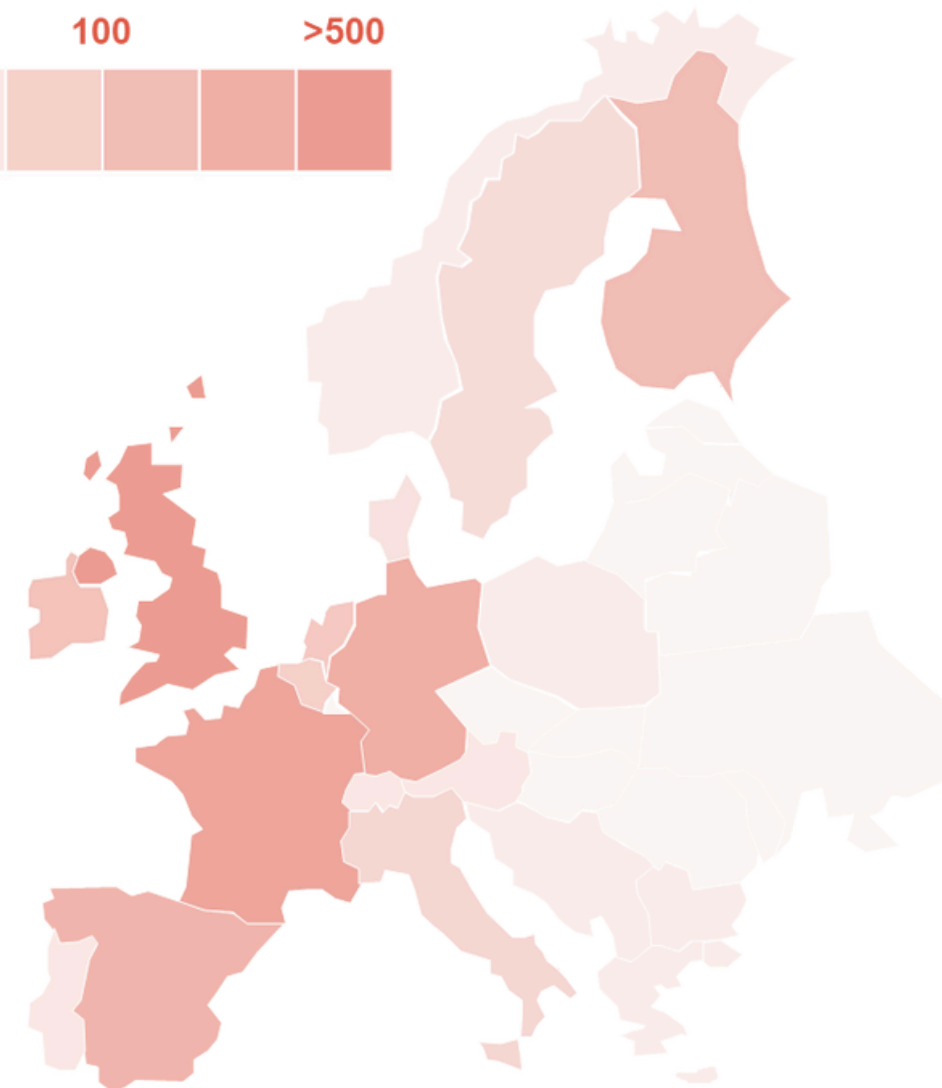
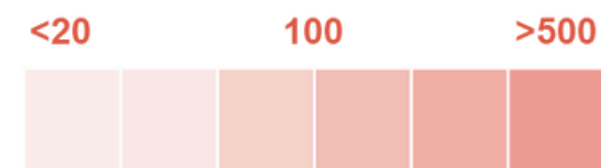
for functional claims in flavoured water is Brain Health

23%

CAGR increase in NPD featuring Energy & Alertness claims

62%

CAGR increase in Limited Edition NPD launches in Europe



NPD Summary



Brain Health

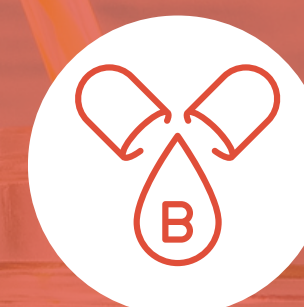
Flavoured Waters targeting brain health often feature functional ingredients and natural nootropics such as matcha, guarana, natural caffeine, vitamins, and L-theanine, with the UK as the top country.

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Clean Label

Clean label remains an important topic, with human welfare claims emerging. These claims involve topics such as community support, commitments to supporting vulnerable populations, and strengthening local economies.



Functional Benefits

•Soft drinks fortified with vitamins and minerals are trending, with vitamin B9, magnesium, and vitamin D3 driving growth. Overall Flavoured bottled waters that highlight immune health are emerging, with Belgium leading the growth in this segment.

Dragonfruit
Mojito
Tutti Frutti
Tangerine
Caramel
Herbs
Wild Berry
Bubble Gum
Bergamot Orange
Pink Lemonade
Black Cherry

INTRODUCTION

Growth in product launches over the last year is high or the flavour is highly mentioned on social media

Banana
Carrot
Blueberry
Vanilla
Apricot
Beetroot
Red Tomato
Cucumber
Mandarin
Sour Cherry
Guarana

GROWTH

Appearance in product launches has been growing over the last year

Lemon
Strawberry
Cola
Lemonade
Lime
Elderflower
Lemon-Lime
Grapefruit
Berry
Citrus
Pink Grapefruit

Appearance in product launches has been growing over the last 4 years

MATURE

Red Apple
Orange
Mango
Ginger
Raspberry
Pineapple
Peach
Passion Fruit

Appeared within top 15 NPD over the last 5 years

PROVEN FAVOURITES

TRENDING FLAVOURS

Traditional flavours remain a staple in soft drinks as consumers gravitate toward familiar, fruity profiles. At the same time, there's growing interest in bold and playful options, with exotic fruits and nostalgic flavours increasingly featured in new launches.

“Citrus flavours are enjoying renewed attention as consumers seek vibrant profiles that balance familiarity with discovery. From pink grapefruit to yuzu, these flavour-forward choices continue to resonate in soft drinks, especially among younger drinkers looking for a natural, feel-good lift.

TOM CLEGHORN

EUROPEAN BEVERAGE CATEGORY MANAGER

KEY STATS

12.3%

Growth in NPD launches with citrus fruit flavours over the last 3 years within soft drinks in Europe.

1 in 5

Consumers globally seek out novel flavours in soft drinks, highlighting the opportunity to provide a range of citrus fruit flavours and combinations.

ONE TO WATCH



The Lift of Lime

NPD with Lime flavours have increased 32% over the last 3 years, often acting as a versatile partner, providing a tart lift to drink profiles.

FLAVOUR SPOTLIGHT



CITRUS FRUIT

Citrus fruits offer a bright, zesty flavour profile that balances sweet and sour notes—making them a go-to ingredient for adding freshness and vibrancy across a wide range of soft drinks.

LATEST NPD



The Organics by Red Bull, Easy Lemon
Austria

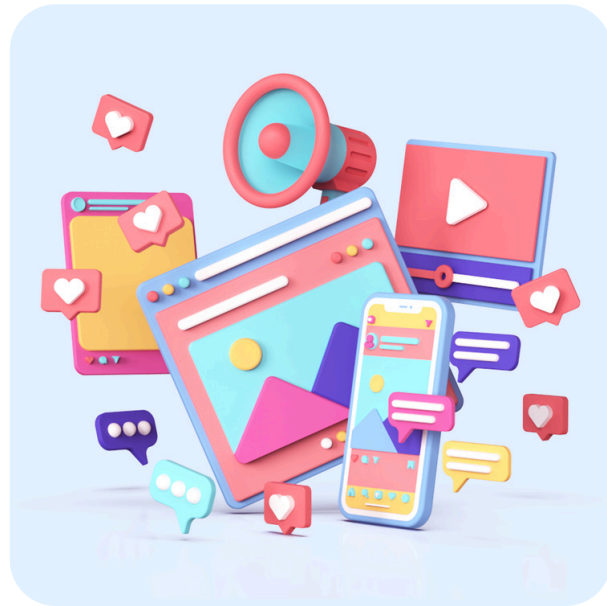


Battery Juiced, Raspberry Lemon,
Finland



Rockstar Zero Sugar
Poland

SOCIAL MEDIA SOFT DRINK TRENDS



The trends in numbers

Prebiotic drink company **Poppi** Boasts over **650,000** followers

Over **83%** of UK people surveyed admit they've bought a drink after seeing it on social platforms.

"Best Hydration Drink" is searched on average **252,000** times a week on Tiktok



Blurring of non-alc and soft drinks

Premium mocktails are gaining popularity, appealing to health-conscious consumers seeking sophistication in their drink choices. As preferences shift towards healthier choices such as zebra stripping, the lines between soft drinks and non-alcoholic beverages continue to blur, with more consumers opting for elevated, alcohol-free alternatives that still offer bold flavours



Hydration and extra flavour push

With consumers seeking healthier, hydrating options, brands like Dash Water, the Soft Drinks Brand of the Year winner, are redefining the soft drinks market, blending hydration with bold flavour. Their marketing breaks traditional moulds, targeting a modern, social-media-savvy consumer with eye-catching packaging and a heavy social media presence for a water centric brand.



Added health benefits in soft drinks

Consumers are increasingly searching for health benefits and brands are responding with functional beverages. Poppi, a prebiotic drink with 656.3k TikTok followers, is gaining traction in this space. Similarly, Trip, topped the list of the UK fastest-growing food and drink brands, blending wellness with refreshment and collaborating with popular wellness influencers.



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