



Soft Drinks in Finland

November 2024

[Table of Contents](#)

EXECUTIVE SUMMARY

Soft drinks in 2024: The big picture

2024 key trends

Competitive landscape

Retailing developments

Foodservice vs retail split

What next for soft drinks?

MARKET DATA

Table 1 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2019-2024

Table 2 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2019-2024

Table 3 - Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2019-2024

Table 4 - Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2019-2024

Table 5 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: Volume 2024

Table 6 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: % Volume 2024

Table 7 - Off-trade vs On-trade Sales of Soft Drinks by Category: Value 2024

Table 8 - Off-trade vs On-trade Sales of Soft Drinks by Category: % Value 2024

Table 9 - Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2019-2024

Table 10 - Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2019-2024

Table 11 - Off-trade Sales of Soft Drinks by Category: Value 2019-2024

Table 12 - Off-trade Sales of Soft Drinks by Category: % Value Growth 2019-2024

Table 13 - Sales of Soft Drinks by Total Fountain On-trade: Volume 2019-2024

Table 14 - Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2019-2024

Table 15 - NBO Company Shares of Total Soft Drinks (RTD): % Volume 2020-2024

Table 16 - LBN Brand Shares of Total Soft Drinks (RTD): % Volume 2021-2024

Table 17 - NBO Company Shares of On-trade Soft Drinks (RTD): % Volume 2020-2024

Table 18 - LBN Brand Shares of On-trade Soft Drinks (RTD): % Volume 2021-2024

Table 19 - NBO Company Shares of Off-trade Soft Drinks (RTD): % Volume 2020-2024

Table 20 - LBN Brand Shares of Off-trade Soft Drinks (RTD): % Volume 2021-2024

Table 21 - NBO Company Shares of Off-trade Soft Drinks: % Value 2020-2024

Table 22 - LBN Brand Shares of Off-trade Soft Drinks: % Value 2021-2024

Table 23 - Penetration of Private Label in Off-trade Soft Drinks (RTD) by Category: % Volume 2019-2024

Table 24 - Penetration of Private Label in Off-trade Soft Drinks by Category: % Value 2019-2024

Table 25 - Distribution of Off-trade Soft Drinks (as sold) by Format: % Volume 2019-2024

Table 26 - Distribution of Off-trade Soft Drinks (as sold) by Format and Category: % Volume 2024

Table 27 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2024-2029

Table 28 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2024-2029

Table 29 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2024-2029

Table 30 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2024-2029

Table 31 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2024-2029

Table 32 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2024-2029

Table 33 - Forecast Off-trade Sales of Soft Drinks by Category: Value 2024-2029

Table 34 - Forecast Off-trade Sales of Soft Drinks by Category: % Value Growth 2024-2029

Table 35 - Forecast Sales of Soft Drinks by Total Fountain On-trade: Volume 2024-2029

Table 36 - Forecast Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2024-2029

APPENDIX

Fountain sales in Finland

DISCLAIMER

SOURCES

Bottled Water in Finland

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Higher prices challenge retail volume sales in bottled water
- Innovations focus on low sugar and convenience to drive sales in bottled water
- Bold flavours and natural ingredients aid sales in bottled water

PROSPECTS AND OPPORTUNITIES

- Health attributes will shape product innovation across the next five years
- Domestic origin remains a key selling point across the forecast period
- Brands respond to climate change by highlighting sustainable actions

CATEGORY DATA

- Table 37 - Off-trade Sales of Bottled Water by Category: Volume 2019-2024
- Table 38 - Off-trade Sales of Bottled Water by Category: Value 2019-2024
- Table 39 - Off-trade Sales of Bottled Water by Category: % Volume Growth 2019-2024
- Table 40 - Off-trade Sales of Bottled Water by Category: % Value Growth 2019-2024
- Table 41 - NBO Company Shares of Off-trade Bottled Water: % Volume 2020-2024
- Table 42 - LBN Brand Shares of Off-trade Bottled Water: % Volume 2021-2024
- Table 43 - NBO Company Shares of Off-trade Bottled Water: % Value 2020-2024
- Table 44 - LBN Brand Shares of Off-trade Bottled Water: % Value 2021-2024
- Table 45 - Forecast Off-trade Sales of Bottled Water by Category: Volume 2024-2029
- Table 46 - Forecast Off-trade Sales of Bottled Water by Category: Value 2024-2029
- Table 47 - Forecast Off-trade Sales of Bottled Water by Category: % Volume Growth 2024-2029
- Table 48 - Forecast Off-trade Sales of Bottled Water by Category: % Value Growth 2024-2029

Carbonates in Finland

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Domestic products showcase their commitment to the Finnish community
- Innovations focus on healthier attributes and reduced sugar
- Premium ingredients and high-quality products appeal to Finnish consumers

PROSPECTS AND OPPORTUNITIES

- Reducing food waste becomes a key sales point for new product innovations
- Private label continues to gain ground, offering appealing and affordable options
- Sustainability takes centre stage in innovation and manufacturing

CATEGORY DATA

- Table 49 - Off-trade vs On-trade Sales of Carbonates: Volume 2019-2024
- Table 50 - Off-trade vs On-trade Sales of Carbonates: Value 2019-2024
- Table 51 - Off-trade vs On-trade Sales of Carbonates: % Volume Growth 2019-2024
- Table 52 - Off-trade vs On-trade Sales of Carbonates: % Value Growth 2019-2024
- Table 53 - Off-trade Sales of Carbonates by Category: Volume 2019-2024
- Table 54 - Off-trade Sales of Carbonates by Category: Value 2019-2024
- Table 55 - Off-trade Sales of Carbonates by Category: % Volume Growth 2019-2024
- Table 56 - Off-trade Sales of Carbonates by Category: % Value Growth 2019-2024
- Table 57 - Total Sales of Carbonates by Fountain On-trade: Volume 2019-2024

Table 58 - Total Sales of Carbonates by Fountain On-trade: % Volume Growth 2019-2024

Table 59 - NBO Company Shares of Off-trade Carbonates: % Volume 2020-2024

Table 60 - LBN Brand Shares of Off-trade Carbonates: % Volume 2021-2024

Table 61 - NBO Company Shares of Off-trade Carbonates: % Value 2020-2024

Table 62 - LBN Brand Shares of Off-trade Carbonates: % Value 2021-2024

Table 63 - Forecast Off-trade Sales of Carbonates by Category: Volume 2024-2029

Table 64 - Forecast Off-trade Sales of Carbonates by Category: Value 2024-2029

Table 65 - Forecast Off-trade Sales of Carbonates by Category: % Volume Growth 2024-2029

Table 66 - Forecast Off-trade Sales of Carbonates by Category: % Value Growth 2024-2029

Table 67 - Forecast Total Sales of Carbonates by Fountain On-trade: Volume 2024-2029

Table 68 - Forecast Total Sales of Carbonates by Fountain On-trade: % Volume Growth 2024-2029

Concentrates in Finland

KEY DATA FINDINGS

2024 DEVELOPMENTS

Zero-sugar products and sports drink concentrates drive growth

Hydration is key to the marketing of concentrates in Finland

Health and sustainability attributes are key to product innovations

PROSPECTS AND OPPORTUNITIES

Brands focus on local origin and consumer engagement to gain ground

Private label gains ground as affordable quality appeals to consumers

Plant-based options rise as consumers adopt vegan lifestyles

CATEGORY DATA

Concentrates Conversions

Summary 2 - Concentrates Conversion Factors for Ready-to-Drink (RTD) Format

Table 69 - Off-trade Sales of Concentrates (RTD) by Category: Volume 2019-2024

Table 70 - Off-trade Sales of Concentrates (RTD) by Category: % Volume Growth 2019-2024

Table 71 - Off-trade Sales of Concentrates by Category: Value 2019-2024

Table 72 - Off-trade Sales of Concentrates by Category: % Value Growth 2019-2024

Table 73 - LBN Brand Shares of Off-trade Concentrates (RTD): % Volume 2021-2024

Table 74 - NBO Company Shares of Off-trade Concentrates: % Value 2020-2024

Table 75 - LBN Brand Shares of Off-trade Concentrates: % Value 2021-2024

Table 76 - NBO Company Shares of Off-trade Liquid Concentrates (RTD): % Volume 2020-2024

Table 77 - LBN Brand Shares of Off-trade Liquid Concentrates (RTD): % Volume 2021-2024

Table 78 - NBO Company Shares of Off-trade Powder Concentrates (RTD): % Volume 2020-2024

Table 79 - LBN Brand Shares of Off-trade Powder Concentrates (RTD): % Volume 2021-2024

Table 80 - Forecast Off-trade Sales of Concentrates (RTD) by Category: Volume 2024-2029

Table 81 - Forecast Off-trade Sales of Concentrates (RTD) by Category: % Volume Growth 2024-2029

Table 82 - Forecast Off-trade Sales of Concentrates by Category: Value 2024-2029

Table 83 - Forecast Off-trade Sales of Concentrates by Category: % Value Growth 2024-2029

Juice in Finland

KEY DATA FINDINGS

2024 DEVELOPMENTS

Retail volume declines as juice suffers from an unhealthy image

Players focus on sugar free launches to attract health-conscious consumers

Demand for functional and fortified options that align with health demands

PROSPECTS AND OPPORTUNITIES

Local production and domestic ingredients remain key sales points over the forecast period

Private label lines focus on fortified innovations to gain ground

Players focus on sustainability and social responsibility to improve brand loyalty

CATEGORY DATA

Table 84 - Off-trade Sales of Juice by Category: Volume 2019-2024

Table 85 - Off-trade Sales of Juice by Category: Value 2019-2024

Table 86 - Off-trade Sales of Juice by Category: % Volume Growth 2019-2024

Table 87 - Off-trade Sales of Juice by Category: % Value Growth 2019-2024

Table 88 - NBO Company Shares of Off-trade Juice: % Volume 2020-2024

Table 89 - LBN Brand Shares of Off-trade Juice: % Volume 2021-2024

Table 90 - NBO Company Shares of Off-trade Juice: % Value 2020-2024

Table 91 - LBN Brand Shares of Off-trade Juice: % Value 2021-2024

Table 92 - Forecast Off-trade Sales of Juice by Category: Volume 2024-2029

Table 93 - Forecast Off-trade Sales of Juice by Category: Value 2024-2029

Table 94 - Forecast Off-trade Sales of Juice by Category: % Volume Growth 2024-2029

Table 95 - Forecast Off-trade Sales of Juice by Category: % Value Growth 2024-2029

RTD Coffee in Finland

KEY DATA FINDINGS

2024 DEVELOPMENTS

Functional ingredients and bold flavours drive growth in RTD coffee

RTD coffee players launch no sugar drinks that align with rising demands

Brands offer plant-based options as the vegan population rises in Finland

PROSPECTS AND OPPORTUNITIES

Launches focus on innovative flavour offerings to gain ground

Premiumisation rises as consumers demand quality ingredients and flavours

Sustainability will be key in new product launches within RTD coffee

CATEGORY DATA

Table 96 - Off-trade Sales of RTD Coffee: Volume 2019-2024

Table 97 - Off-trade Sales of RTD Coffee: Value 2019-2024

Table 98 - Off-trade Sales of RTD Coffee: % Volume Growth 2019-2024

Table 99 - Off-trade Sales of RTD Coffee: % Value Growth 2019-2024

Table 100 - NBO Company Shares of Off-trade RTD Coffee: % Volume 2020-2024

Table 101 - LBN Brand Shares of Off-trade RTD Coffee: % Volume 2021-2024

Table 102 - NBO Company Shares of Off-trade RTD Coffee: % Value 2020-2024

Table 103 - LBN Brand Shares of Off-trade RTD Coffee: % Value 2021-2024

Table 104 - Forecast Off-trade Sales of RTD Coffee: Volume 2024-2029

Table 105 - Forecast Off-trade Sales of RTD Coffee: Value 2024-2029

Table 106 - Forecast Off-trade Sales of RTD Coffee: % Volume Growth 2024-2029

Table 107 - Forecast Off-trade Sales of RTD Coffee: % Value Growth 2024-2029

RTD Tea in Finland

KEY DATA FINDINGS

2024 DEVELOPMENTS

Innovations focus on flavour and functional ingredients to drive volume sales

Private label gains share by offering affordable options with sophisticated flavours

Kombucha gains ground as consumers appreciate gut health support

PROSPECTS AND OPPORTUNITIES

Flavour exploration and on-the-go packaging will be key over the forecast period
Domestic players highlight their local origin to engage Finnish consumers
Sustainable attributes become commonplace in RTD tea products

CATEGORY DATA

- Table 108 - Off-trade Sales of RTD Tea by Category: Volume 2019-2024
- Table 109 - Off-trade Sales of RTD Tea by Category: Value 2019-2024
- Table 110 - Off-trade Sales of RTD Tea by Category: % Volume Growth 2019-2024
- Table 111 - Off-trade Sales of RTD Tea by Category: % Value Growth 2019-2024
- Table 112 - Leading Flavours for Off-trade RTD Tea: % Volume 2019-2024
- Table 113 - NBO Company Shares of Off-trade RTD Tea: % Volume 2020-2024
- Table 114 - LBN Brand Shares of Off-trade RTD Tea: % Volume 2021-2024
- Table 115 - NBO Company Shares of Off-trade RTD Tea: % Value 2020-2024
- Table 116 - LBN Brand Shares of Off-trade RTD Tea: % Value 2021-2024
- Table 117 - Forecast Off-trade Sales of RTD Tea by Category: Volume 2024-2029
- Table 118 - Forecast Off-trade Sales of RTD Tea by Category: Value 2024-2029
- Table 119 - Forecast Off-trade Sales of RTD Tea by Category: % Volume Growth 2024-2029
- Table 120 - Forecast Off-trade Sales of RTD Tea by Category: % Value Growth 2024-2029

Energy Drinks in Finland

KEY DATA FINDINGS

2024 DEVELOPMENTS

Product innovation drives off-trade volume sales in 2024
Interesting flavour combinations appeal to consumers and drive sales
Functionality and flavour are a key combination in energy drinks

PROSPECTS AND OPPORTUNITIES

Innovative marketing campaigns that place consumers at the centre
Innovations focus on unique flavour combinations to stand out
Local players continue to communicate domestic origin to drive sales

CATEGORY DATA

- Table 121 - Off-trade Sales of Energy Drinks: Volume 2019-2024
- Table 122 - Off-trade Sales of Energy Drinks: Value 2019-2024
- Table 123 - Off-trade Sales of Energy Drinks: % Volume Growth 2019-2024
- Table 124 - Off-trade Sales of Energy Drinks: % Value Growth 2019-2024
- Table 125 - NBO Company Shares of Off-trade Energy Drinks: % Volume 2020-2024
- Table 126 - LBN Brand Shares of Off-trade Energy Drinks: % Volume 2021-2024
- Table 127 - NBO Company Shares of Off-trade Energy Drinks: % Value 2020-2024
- Table 128 - LBN Brand Shares of Off-trade Energy Drinks: % Value 2021-2024
- Table 129 - Forecast Off-trade Sales of Energy Drinks: Volume 2024-2029
- Table 130 - Forecast Off-trade Sales of Energy Drinks: Value 2024-2029
- Table 131 - Forecast Off-trade Sales of Energy Drinks: % Volume Growth 2024-2029
- Table 132 - Forecast Off-trade Sales of Energy Drinks: % Value Growth 2024-2029

Sports Drinks in Finland

KEY DATA FINDINGS

2024 DEVELOPMENTS

Rising interest in health and exercise boosts volume growth for sports drinks
Fortified and functional benefits drive the ongoing appeal of sports drinks
Coconut water is embraced as a natural, functional ingredient

PROSPECTS AND OPPORTUNITIES

Brands focus on marketing and endorsements to stand out against private label
Private label gains ground, offering functional and affordable options
Domestic players stand out on the competitive landscape

CATEGORY DATA

Table 133 - Off-trade Sales of Sports Drinks: Volume 2019-2024
Table 134 - Off-trade Sales of Sports Drinks: Value 2019-2024
Table 135 - Off-trade Sales of Sports Drinks: % Volume Growth 2019-2024
Table 136 - Off-trade Sales of Sports Drinks: % Value Growth 2019-2024
Table 137 - NBO Company Shares of Off-trade Sports Drinks: % Volume 2020-2024
Table 138 - LBN Brand Shares of Off-trade Sports Drinks: % Volume 2021-2024
Table 139 - NBO Company Shares of Off-trade Sports Drinks: % Value 2020-2024
Table 140 - LBN Brand Shares of Off-trade Sports Drinks: % Value 2021-2024
Table 141 - Forecast Off-trade Sales of Sports Drinks: Volume 2024-2029
Table 142 - Forecast Off-trade Sales of Sports Drinks: Value 2024-2029
Table 143 - Forecast Off-trade Sales of Sports Drinks: % Volume Growth 2024-2029
Table 144 - Forecast Off-trade Sales of Sports Drinks: % Value Growth 2024-2029

About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/soft-drinks-in-finland/report.