



Carbonates in the US

January 2025

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KEY DATA FINDINGS

2024 DEVELOPMENTS

- Products that are functional and health-oriented continue to grow
- Volumes decline due to price adjustments and overall inflation
- Balancing growth with sweetness: The role of reduced sugar and natural sweeteners

PROSPECTS AND OPPORTUNITIES

- Affordability could create growth opportunities, but premiumisation will remain on the horizon
- Carbonates will feel the pressure from lifestyle drinks such as sports drinks and energy drinks
- On-trade growth expected to slow significantly, as it has reached 2019 volumes

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Fountain sales in the US

Growth continues, but sales fail to return to the pre-pandemic level

Innovation in fountain sales aims to personalise experiences

Major foodservice operator to start phasing out fountain sales

DISCLAIMER

SOURCES

Summary 1 - Research Sources

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