



Euromonitor  
International

# Carbonates in Japan

December 2024

Table of Contents

KEY DATA FINDINGS

2024 DEVELOPMENTS

Carbonates sees tough competition from bottled water and RTD tea  
After growth in 2023, cola carbonates faces decline in 2024  
Nostalgia trend shapes carbonates

PROSPECTS AND OPPORTUNITIES

Declining birth rate and health trend threaten carbonates in Japan  
On-trade sales set to continue to recover, but fail to reach the pre-pandemic level  
New concepts set to emerge as consumers value innovation

CATEGORY DATA

- Table 1 - Off-trade vs On-trade Sales of Carbonates: Volume 2019-2024
- Table 2 - Off-trade vs On-trade Sales of Carbonates: Value 2019-2024
- Table 3 - Off-trade vs On-trade Sales of Carbonates: % Volume Growth 2019-2024
- Table 4 - Off-trade vs On-trade Sales of Carbonates: % Value Growth 2019-2024
- Table 5 - Off-trade Sales of Carbonates by Category: Volume 2019-2024
- Table 6 - Off-trade Sales of Carbonates by Category: Value 2019-2024
- Table 7 - Off-trade Sales of Carbonates by Category: % Volume Growth 2019-2024
- Table 8 - Off-trade Sales of Carbonates by Category: % Value Growth 2019-2024
- Table 9 - Total Sales of Carbonates by Fountain On-trade: Volume 2019-2024
- Table 10 - Total Sales of Carbonates by Fountain On-trade: % Volume Growth 2019-2024
- Table 11 - NBO Company Shares of Off-trade Carbonates: % Volume 2020-2024
- Table 12 - LBN Brand Shares of Off-trade Carbonates: % Volume 2021-2024
- Table 13 - NBO Company Shares of Off-trade Carbonates: % Value 2020-2024
- Table 14 - LBN Brand Shares of Off-trade Carbonates: % Value 2021-2024
- Table 15 - Forecast Off-trade Sales of Carbonates by Category: Volume 2024-2029
- Table 16 - Forecast Off-trade Sales of Carbonates by Category: Value 2024-2029
- Table 17 - Forecast Off-trade Sales of Carbonates by Category: % Volume Growth 2024-2029
- Table 18 - Forecast Off-trade Sales of Carbonates by Category: % Value Growth 2024-2029
- Table 19 - Forecast Total Sales of Carbonates by Fountain On-trade: Volume 2024-2029
- Table 20 - Forecast Total Sales of Carbonates by Fountain On-trade: % Volume Growth 2024-2029

Soft Drinks in Japan - Industry Overview

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 21 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2019-2024
- Table 22 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2019-2024
- Table 23 - Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2019-2024
- Table 24 - Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2019-2024
- Table 25 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: Volume 2024
- Table 26 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: % Volume 2024
- Table 27 - Off-trade vs On-trade Sales of Soft Drinks by Category: Value 2024

Table 28 - Off-trade vs On-trade Sales of Soft Drinks by Category: % Value 2024

Table 29 - Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2019-2024

Table 30 - Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2019-2024

Table 31 - Off-trade Sales of Soft Drinks by Category: Value 2019-2024

Table 32 - Off-trade Sales of Soft Drinks by Category: % Value Growth 2019-2024

Table 33 - Sales of Soft Drinks by Total Fountain On-trade: Volume 2019-2024

Table 34 - Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2019-2024

Table 35 - NBO Company Shares of Total Soft Drinks (RTD): % Volume 2020-2024

Table 36 - LBN Brand Shares of Total Soft Drinks (RTD): % Volume 2021-2024

Table 37 - NBO Company Shares of On-trade Soft Drinks (RTD): % Volume 2020-2024

Table 38 - LBN Brand Shares of On-trade Soft Drinks (RTD): % Volume 2021-2024

Table 39 - NBO Company Shares of Off-trade Soft Drinks (RTD): % Volume 2020-2024

Table 40 - LBN Brand Shares of Off-trade Soft Drinks (RTD): % Volume 2021-2024

Table 41 - NBO Company Shares of Off-trade Soft Drinks: % Value 2020-2024

Table 42 - LBN Brand Shares of Off-trade Soft Drinks: % Value 2021-2024

Table 43 - Penetration of Private Label in Off-trade Soft Drinks (RTD) by Category: % Volume 2019-2024

Table 44 - Penetration of Private Label in Off-trade Soft Drinks by Category: % Value 2019-2024

Table 45 - Distribution of Off-trade Soft Drinks (as sold) by Format: % Volume 2019-2024

Table 46 - Distribution of Off-trade Soft Drinks (as sold) by Format and Category: % Volume 2024

Table 47 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2024-2029

Table 48 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2024-2029

Table 49 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2024-2029

Table 50 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2024-2029

Table 51 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2024-2029

Table 52 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2024-2029

Table 53 - Forecast Off-trade Sales of Soft Drinks by Category: Value 2024-2029

Table 54 - Forecast Off-trade Sales of Soft Drinks by Category: % Value Growth 2024-2029

Table 55 - Forecast Sales of Soft Drinks by Total Fountain On-trade: Volume 2024-2029

Table 56 - Forecast Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2024-2029

APPENDIX

Fountain sales in Japan

Trends

DISCLAIMER

SOURCES

Summary 1 - Research Sources

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/carbonates-in-japan/report](http://www.euromonitor.com/carbonates-in-japan/report).