



**Euromonitor
International**

Soft Drinks in Belgium

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 Belgium

DISCLAIMER

SOURCES

Bottled Water in Belgium

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Bottled water benefits from its alignment with rising health trends
- Affordable options and convenience drives bottled water sales
- Flavoured water is a fading trend despite ongoing innovation on the landscape

PROSPECTS AND OPPORTUNITIES

- The outlook for bottled water benefits from health trends and consumer preferences
- Functional bottled water gains ground as players invest in new launches
- Sustainable packaging becomes a key feature of bottled water

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 Belgium

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Health trends and cold weather negatively impact demand for carbonates
- Soft drinks offer an affordable indulgence, boosting sales of smaller pack sizes
- Leading players implement promotions and online strategies to gain ground

PROSPECTS AND OPPORTUNITIES

- Innovation opportunities exist for the other carbonates landscape
- Innovation set to focus on functional drinks, aligning with health trends
- Hard discounters and the ongoing growth of small distribution channels

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 Belgium

KEY DATA FINDINGS

2024 DEVELOPMENTS

Concentrates struggle as health trends shift consumer preferences

SodaStream hits a plateau while private label options gain ground

Environmental concerns aid sales of concentrates in 2024

PROSPECTS AND OPPORTUNITIES

Health trends and sustainability slows down the decline for liquid concentrates'

Refillable bottles and school vending machines boost prospects for concentrates

The focus on functional options drives growth potential for concentrates

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 Belgium

KEY DATA FINDINGS

2024 DEVELOPMENTS

Price hikes, supply shortages and the sugar debate negatively impact sales of juice

Juice brands adapt to changing consumer preferences through innovation

Innovating to combat decline as juice options aligns with health trends

PROSPECTS AND OPPORTUNITIES

Responding to retail volume decline through variety and diversification
Opportunities are found in cocktails, mocktails, and sophisticated flavours
Smaller formats and indulgence in the fruit juice landscape

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 Belgium

KEY DATA FINDINGS

2024 DEVELOPMENTS

Packaging changes and health-conscious innovations drive volume sales
Health and functionality drive growth in the RTD coffee landscape
Private labels leads, despite innovations from Emmi and Starbucks

PROSPECTS AND OPPORTUNITIES

Rapid growth for RTD coffee due to convenience and health trends
Private labels in RTD coffee will need to innovate to retain ground
Costa Coffee is set to expand into retail channels across the next five years

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 Belgium

KEY DATA FINDINGS

2024 DEVELOPMENTS

Price competition and flavour variety propel the performance of RTD tea
Healthier options help revitalise the RTD tea landscape

The taste of Kombucha acts as a challenge for higher levels of sales

PROSPECTS AND OPPORTUNITIES

Price wars and health trends propel the RTD tea landscape

Health trends and functionality drive innovations in RTD tea

Kombucha faces challenges despite its alignment with health trends

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 Belgium

KEY DATA FINDINGS

2024 DEVELOPMENTS

Sustained growth fuelled by busy lifestyles and the demand for functional drinks

Innovations and new entrants align with the rising health trend

Red Bull's dominance and growth on the energy drinks landscape

PROSPECTS AND OPPORTUNITIES

Functionality will help to diversify the consumer base for energy drinks

Diverse distribution channels drive growth on the energy drinks landscape

Health and wellness supports ongoing innovation across the forecast period

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 Belgium

KEY DATA FINDINGS

2024 DEVELOPMENTS

Health consciousness and demand for functional beverages drives sales
Sports drink players navigate sugar concerns through innovation
Rising competition from functional waters and energy drinks challenges sports drinks sales

PROSPECTS AND OPPORTUNITIES

Enhanced functionalities offer a consumer-centric product in sports drinks
Innovations align with the demand for functional beverages to aid growth
Targeted solutions is an opportunity for the future of innovation in sports drinks

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-belgium/report.