



Euromonitor  
International

# Soft Drinks in Asia Pacific

May 2025

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## INTRODUCTION

Key findings

## REGIONAL OVERVIEW

Asia Pacific has the highest sales but the lowest per capita consumption  
Steady value and volume growth expected in the coming years  
Bottled water leads soft drinks sales in Asia Pacific  
Juice drinks continue to decline in the Chinese market  
Indian energy drinks recording very dynamic growth over 2019-2024  
Bottled water dominates the new sales added in Asia Pacific over 2019-2024  
Health consciousness impacting consumer choices and new product developments  
Health consciousness impacting consumer choices and new product developments  
Small local grocers lead off-trade distribution of soft drinks in Asia Pacific  
Despite losing share during the pandemic, vending remains a key channel in Japan

## LEADING COMPANIES AND BRANDS

Relatively fragmented competitive landscape in China  
Players actively targeting reduced-sugar categories in the Chinese market  
Coca-Cola and PepsiCo present across the Asia Pacific region  
Nongfu Spring becomes the leading brand in Asia Pacific soft drinks in 2024

## FORECAST PROJECTIONS

Steady value and volume growth expected in the coming years  
Quick commerce expected to grow in importance in India

## COUNTRY SNAPSHOTS

China: Market Context  
China : Competitive and Retail Landscape  
Hong Kong, China: Market Context  
Hong Kong, China : Competitive and Retail Landscape  
India: Market Context  
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Vietnam: Market Context  
Vietnam : Competitive and Retail Landscape

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