

Carbonates in Belgium

November 2025

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KEY DATA FINDINGS

2025 DEVELOPMENTS

Growth for carbonates in 2025 as outdoor consumption increases

INDUSTRY PERFORMANCE

Exceptionally good weather and higher prices boost a category otherwise in decline
Demand for novel flavours benefits non-cola carbonates in 2025

WHAT'S NEXT?

Decline predicted without support of good weather
Health-driven innovation and channel shift will shape the landscape
Stricter marketing rules could weigh on category performance

COMPETITIVE LANDSCAPE

Coca-Cola Belgium maintains leadership through innovation and engagement
Private label benefits from widespread price-consciousness amid high inflation

CHANNELS

Supermarkets lead, thanks to ability to offer wide range of products across the price spectrum
Discounters and proximity retailers gain ground

CATEGORY DATA

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EXECUTIVE SUMMARY

Soft drinks in 2025: The big picture

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INDUSTRY PERFORMANCE

Buoyant performance for Belgian soft drinks in 2025

Functionality remains a key driver of innovation and growth

Smaller pack sizes are becoming increasingly common

WHAT'S NEXT?

Growth moderation predicted over the forecast period

Functionality will remain a focus growth area

Distribution landscape may need to diversify

COMPETITIVE LANDSCAPE

Coca-Cola continues to benefit from strong brand recognition and widespread distribution

foodPickers benefits from functionality trend

CHANNELS

Supermarkets and discounters continue to lead distribution in 2025

Proximity retailers continue to gain ground

Foodservice vs retail split

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