



**Euromonitor
International**

Carbonates in Japan

November 2025

Table of Contents

KEY DATA FINDINGS

2025 PERFORMANCE

A tough year for carbonates as prices rise again

INDUSTRY PERFORMANCE

Price increases place downward pressure on retail volume sales of carbonates

Heatwaves have a negative impact on sales

WHAT'S NEXT?

Volume sales set to decline but opportunities still exist to add value

Players will need to adapt to the demographic shifts being seen within Japan

Functional carbonates: a shift towards health and wellness

COMPETITIVE LANDSCAPE

Leading players tap into nostalgia with retro-inspired products

Players also look to the future with new innovations

CHANNELS

Distribution shifting towards e-commerce as consumers embrace label-less products

Vending remains a key retail channel despite its sales being under pressure

CATEGORY DATA

Table 1 - Off-trade vs On-trade Sales of Carbonates: Volume 2020-2025

Table 2 - Off-trade vs On-trade Sales of Carbonates: Value 2020-2025

Table 3 - Off-trade vs On-trade Sales of Carbonates: % Volume Growth 2020-2025

Table 4 - Off-trade vs On-trade Sales of Carbonates: % Value Growth 2020-2025

Table 5 - Off-trade Sales of Carbonates by Category: Volume 2020-2025

Table 6 - Off-trade Sales of Carbonates by Category: Value 2020-2025

Table 7 - Off-trade Sales of Carbonates by Category: % Volume Growth 2020-2025

Table 8 - Off-trade Sales of Carbonates by Category: % Value Growth 2020-2025

Table 9 - Total Sales of Carbonates by Fountain On-trade: Volume 2020-2025

Table 10 - Total Sales of Carbonates by Fountain On-trade: % Volume Growth 2020-2025

Table 11 - NBO Company Shares of Off-trade Carbonates: % Volume 2021-2025

Table 12 - LBN Brand Shares of Off-trade Carbonates: % Volume 2022-2025

Table 13 - NBO Company Shares of Off-trade Carbonates: % Value 2021-2025

Table 14 - LBN Brand Shares of Off-trade Carbonates: % Value 2022-2025

Table 15 - Forecast Off-trade Sales of Carbonates by Category: Volume 2025-2030

Table 16 - Forecast Off-trade Sales of Carbonates by Category: Value 2025-2030

Table 17 - Forecast Off-trade Sales of Carbonates by Category: % Volume Growth 2025-2030

Table 18 - Forecast Off-trade Sales of Carbonates by Category: % Value Growth 2025-2030

Table 19 - Forecast Total Sales of Carbonates by Fountain On-trade: Volume 2025-2030

Table 20 - Forecast Total Sales of Carbonates by Fountain On-trade: % Volume Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

Soft Drinks in Japan - Industry Overview

EXECUTIVE SUMMARY

Rising prices put pressure on volume sales in 2025

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Price rises lead to a decline in off-trade volume sales of soft drinks in 2025

Functional soft drinks gain prominence

Innovation has become faster, riskier, and more culturally embedded

WHAT'S NEXT?

Shrinking population likely to limit opportunities for volume growth

Healthy and natural products likely to attract more interest moving forward

Vending evolving as it looks to meet the needs of modern consumers

COMPETITIVE LANDSCAPE

Coca-Cola and Suntory continue to invest in product development and innovation

Nippon Del Monte finds success with new line of tomato juice

CHANNELS

Label-less products gain traction as online sales rise

On-trade volume sales continue to recover buoyed by interest in RTD tea

MARKET DATA

Table 21 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2020-2025

Table 22 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2020-2025

Table 23 - Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2020-2025

Table 24 - Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2020-2025

Table 25 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: Volume 2025

Table 26 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: % Volume 2025

Table 27 - Off-trade vs On-trade Sales of Soft Drinks by Category: Value 2025

Table 28 - Off-trade vs On-trade Sales of Soft Drinks by Category: % Value 2025

Table 29 - Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2020-2025

Table 30 - Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2020-2025

Table 31 - Off-trade Sales of Soft Drinks by Category: Value 2020-2025

Table 32 - Off-trade Sales of Soft Drinks by Category: % Value Growth 2020-2025

Table 33 - Sales of Soft Drinks by Total Fountain On-trade: Volume 2020-2025

Table 34 - Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2020-2025

Table 35 - NBO Company Shares of Total Soft Drinks (RTD): % Volume 2021-2025

Table 36 - LBN Brand Shares of Total Soft Drinks (RTD): % Volume 2022-2025

Table 37 - NBO Company Shares of On-trade Soft Drinks (RTD): % Volume 2021-2025

Table 38 - LBN Brand Shares of On-trade Soft Drinks (RTD): % Volume 2022-2025

Table 39 - NBO Company Shares of Off-trade Soft Drinks (RTD): % Volume 2021-2025

Table 40 - LBN Brand Shares of Off-trade Soft Drinks (RTD): % Volume 2022-2025

Table 41 - NBO Company Shares of Off-trade Soft Drinks: % Value 2021-2025

Table 42 - LBN Brand Shares of Off-trade Soft Drinks: % Value 2022-2025

Table 43 - Penetration of Private Label in Off-trade Soft Drinks (RTD) by Category: % Volume 2020-2025

Table 44 - Penetration of Private Label in Off-trade Soft Drinks by Category: % Value 2020-2025

Table 45 - Distribution of Off-trade Soft Drinks (as sold) by Format: % Volume 2020-2025

Table 46 - Distribution of Off-trade Soft Drinks (as sold) by Format and Category: % Volume 2025

Table 47 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2025-2030

Table 48 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2025-2030

Table 49 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2025-2030

Table 50 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2025-2030

Table 51 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2025-2030

Table 52 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2025-2030

Table 53 - Forecast Off-trade Sales of Soft Drinks by Category: Value 2025-2030

Table 54 - Forecast Off-trade Sales of Soft Drinks by Category: % Value Growth 2025-2030

Table 55 - Forecast Sales of Soft Drinks by Total Fountain On-trade: Volume 2025-2030

Table 56 - Forecast Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2025-2030

APPENDIX

Fountain sales in Japan

COUNTRY REPORTS 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.