



Euromonitor  
International

# Concentrates in Japan

November 2025

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## Concentrates in Japan - Category analysis

### KEY DATA FINDINGS

#### 2025 PERFORMANCE

Concentrates offers an economical, sustainable and versatile soft drinks option

#### INDUSTRY PERFORMANCE

Liquid concentrates benefit from the value and convenience they offer

Competition from RTD sports drinks a hinderance to the growth of powder concentrates

#### WHAT'S NEXT?

New consumption occasions should help to fuel growth in liquid concentrates

Asahi under pressure to adjust to demographic changes

Concentrates: a sustainable choice for modern households

#### COMPETITIVE LANDSCAPE

Asahi Soft Drinks retains a strong lead in concentrates with its Calpis brand

Ouchi Drink Bar proving to be a big success for Suntory

#### CHANNELS

Asahi looks to feed off the dominant position of supermarkets during "Calpis Day"

CJ Japan Cop targets the on-trade channel

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## 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

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