



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

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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

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