



Soft Drinks in Denmark

December 2025

Table of Contents

Soft Drinks in Denmark

EXECUTIVE SUMMARY

Healthier and better quality preference favours off-trade value over volume growth

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Health and wellness is reshaping soft drinks

Mixed bag for new entries

Price promotions and special deals win over consumers

WHAT'S NEXT?

Shift away from sugary products to continue

Health-orientated soft drinks to drive growth

Players to shape new launches to exploit health and wellness demand

COMPETITIVE LANDSCAPE

Royal Unibrew retains leadership but Carlsberg remains a close challenger

Local brands gain ground in a tougher environment for US counterparts

CHANNELS

Wide, competitively-priced assortments lure soft drinks consumers

More stable retail-foodservice split

MARKET DATA

Table 1 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2020-2025

Table 2 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2020-2025

Table 3 - Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2020-2025

Table 4 - Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2020-2025

Table 5 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: Volume 2025

Table 6 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: % Volume 2025

Table 7 - Off-trade vs On-trade Sales of Soft Drinks by Category: Value 2025

Table 8 - Off-trade vs On-trade Sales of Soft Drinks by Category: % Value 2025

Table 9 - Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2020-2025

Table 10 - Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2020-2025

Table 11 - Off-trade Sales of Soft Drinks by Category: Value 2020-2025

Table 12 - Off-trade Sales of Soft Drinks by Category: % Value Growth 2020-2025

Table 13 - Sales of Soft Drinks by Total Fountain On-trade: Volume 2020-2025

Table 14 - Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2020-2025

Table 15 - NBO Company Shares of Total Soft Drinks (RTD): % Volume 2021-2025

Table 16 - LBN Brand Shares of Total Soft Drinks (RTD): % Volume 2022-2025

Table 17 - NBO Company Shares of On-trade Soft Drinks (RTD): % Volume 2021-2025

Table 18 - LBN Brand Shares of On-trade Soft Drinks (RTD): % Volume 2022-2025

Table 19 - NBO Company Shares of Off-trade Soft Drinks (RTD): % Volume 2021-2025

Table 20 - LBN Brand Shares of Off-trade Soft Drinks (RTD): % Volume 2022-2025

Table 21 - NBO Company Shares of Off-trade Soft Drinks: % Value 2021-2025

Table 22 - LBN Brand Shares of Off-trade Soft Drinks: % Value 2022-2025

Table 23 - Penetration of Private Label in Off-trade Soft Drinks (RTD) by Category: % Volume 2020-2025

Table 24 - Penetration of Private Label in Off-trade Soft Drinks by Category: % Value 2020-2025

Table 25 - Distribution of Off-trade Soft Drinks (as sold) by Format: % Volume 2020-2025

Table 26 - Distribution of Off-trade Soft Drinks (as sold) by Format and Category: % Volume 2025

Table 27 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2025-2030

Table 28 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2025-2030

Table 29 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2025-2030
 Table 30 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2025-2030
 Table 31 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2025-2030
 Table 32 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2025-2030
 Table 33 - Forecast Off-trade Sales of Soft Drinks by Category: Value 2025-2030
 Table 34 - Forecast Off-trade Sales of Soft Drinks by Category: % Value Growth 2025-2030
 Table 35 - Forecast Sales of Soft Drinks by Total Fountain On-trade: Volume 2025-2030
 Table 36 - Forecast Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2025-2030

APPENDIX

Fountain sales in Denmark

COUNTRY REPORTS DISCLAIMER

SOURCES

Summary 1 - Research Sources

Bottled Water in Denmark

KEY DATA FINDINGS

2025 DEVELOPMENTS

Slower, but still good volume growth trajectory

INDUSTRY PERFORMANCE

Still bottled water retains off- and on-trade preference

Growing array helps to push awareness and acceptance of functional bottled water

WHAT'S NEXT?

Steadily rising demand for bottled water

Promising growth opportunities within flavoured bottled water

Sustainability continues to emerge as a key success factor

COMPETITIVE LANDSCAPE

Aqua D'Or Mineral Water remains the clear leader with a wide offer

Competitive prices support fast growth for local flavoured bottled water player

CHANNELS

Large modern grocery retailers dominate through convenient shopping and competitively-priced assortments

Convenience drives purchases via e-commerce

CATEGORY DATA

Table 37 - Off-trade Sales of Bottled Water by Category: Volume 2020-2025
 Table 38 - Off-trade Sales of Bottled Water by Category: Value 2020-2025
 Table 39 - Off-trade Sales of Bottled Water by Category: % Volume Growth 2020-2025
 Table 40 - Off-trade Sales of Bottled Water by Category: % Value Growth 2020-2025
 Table 41 - NBO Company Shares of Off-trade Bottled Water: % Volume 2021-2025
 Table 42 - LBN Brand Shares of Off-trade Bottled Water: % Volume 2022-2025
 Table 43 - NBO Company Shares of Off-trade Bottled Water: % Value 2021-2025
 Table 44 - LBN Brand Shares of Off-trade Bottled Water: % Value 2022-2025
 Table 45 - Forecast Off-trade Sales of Bottled Water by Category: Volume 2025-2030
 Table 46 - Forecast Off-trade Sales of Bottled Water by Category: Value 2025-2030
 Table 47 - Forecast Off-trade Sales of Bottled Water by Category: % Volume Growth 2025-2030
 Table 48 - Forecast Off-trade Sales of Bottled Water by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

Carbonates in Denmark

KEY DATA FINDINGS

2025 DEVELOPMENTS

Consumption choices and health and wellness considerations shape performance

INDUSTRY PERFORMANCE

Reduced sugar categories drive growth

Consumers develop a taste for craft and premium carbonates

WHAT'S NEXT?

Search for healthier alternatives to dampen the demand for regular carbonates

Affordable pack sizing to gain momentum

Focus on reduced sugar carbonates amid a general health and wellness trend

COMPETITIVE LANDSCAPE

Local brands help to offset some turmoil for the leading players

Bryggeriet Vestfyen shows dynamism through health and wellness-orientated launches for Jolly

CHANNELS

Discounters leverage competitive pricing initiatives to lead distribution

Strong investment in e-commerce as omnichannel retailing gains weight

CATEGORY DATA

Table 49 - Off-trade vs On-trade Sales of Carbonates: Volume 2020-2025

Table 50 - Off-trade vs On-trade Sales of Carbonates: Value 2020-2025

Table 51 - Off-trade vs On-trade Sales of Carbonates: % Volume Growth 2020-2025

Table 52 - Off-trade vs On-trade Sales of Carbonates: % Value Growth 2020-2025

Table 53 - Off-trade Sales of Carbonates by Category: Volume 2020-2025

Table 54 - Off-trade Sales of Carbonates by Category: Value 2020-2025

Table 55 - Off-trade Sales of Carbonates by Category: % Volume Growth 2020-2025

Table 56 - Off-trade Sales of Carbonates by Category: % Value Growth 2020-2025

Table 57 - Total Sales of Carbonates by Fountain On-trade: Volume 2020-2025

Table 58 - Total Sales of Carbonates by Fountain On-trade: % Volume Growth 2020-2025

Table 59 - NBO Company Shares of Off-trade Carbonates: % Volume 2021-2025

Table 60 - LBN Brand Shares of Off-trade Carbonates: % Volume 2022-2025

Table 61 - NBO Company Shares of Off-trade Carbonates: % Value 2021-2025

Table 62 - LBN Brand Shares of Off-trade Carbonates: % Value 2022-2025

Table 63 - Forecast Off-trade Sales of Carbonates by Category: Volume 2025-2030

Table 64 - Forecast Off-trade Sales of Carbonates by Category: Value 2025-2030

Table 65 - Forecast Off-trade Sales of Carbonates by Category: % Volume Growth 2025-2030

Table 66 - Forecast Off-trade Sales of Carbonates by Category: % Value Growth 2025-2030

Table 67 - Forecast Total Sales of Carbonates by Fountain On-trade: Volume 2025-2030

Table 68 - Forecast Total Sales of Carbonates by Fountain On-trade: % Volume Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

Concentrates in Denmark

KEY DATA FINDINGS

2025 DEVELOPMENTS

Concentrates remains on a downward demand trajectory

INDUSTRY PERFORMANCE

Limited offer and high sugar content hinder demand for powder concentrates

Parents increase scrutiny of nutritional quality of liquid concentrates

WHAT'S NEXT?

Concentrates to continue to lose appeal although potential bright spots appear

Targeted positioning and innovation offer may increase the appeal of powder concentrates

Potential push-pull effect of health and wellness on liquid concentrates

COMPETITIVE LANDSCAPE

Orkla Foods Danmark enjoys high recognition with a strong brand portfolio

Greater shelf space helps to grow consumer awareness for Ribena

CHANNELS

Convenience, choice and pricing favour large grocery retail formats

Small but growing online presence and sales for concentrates

Concentrates Conversions

Summary 2 - Concentrates Conversion Factors for Ready-to-Drink (RTD) Format

CATEGORY DATA

Table 69 - Off-trade Sales of Concentrates (RTD) by Category: Volume 2020-2025

Table 70 - Off-trade Sales of Concentrates (RTD) by Category: % Volume Growth 2020-2025

Table 71 - Off-trade Sales of Concentrates by Category: Value 2020-2025

Table 72 - Off-trade Sales of Concentrates by Category: % Value Growth 2020-2025

Table 73 - LBN Brand Shares of Off-trade Concentrates (RTD): % Volume 2022-2025

Table 74 - NBO Company Shares of Off-trade Concentrates: % Value 2021-2025

Table 75 - LBN Brand Shares of Off-trade Concentrates: % Value 2022-2025

Table 76 - NBO Company Shares of Off-trade Liquid Concentrates (RTD): % Volume 2021-2025

Table 77 - LBN Brand Shares of Off-trade Liquid Concentrates (RTD): % Volume 2022-2025

Table 78 - NBO Company Shares of Off-trade Powder Concentrates (RTD): % Volume 2021-2025

Table 79 - LBN Brand Shares of Off-trade Powder Concentrates (RTD): % Volume 2022-2025

Table 80 - Forecast Off-trade Sales of Concentrates (RTD) by Category: Volume 2025-2030

Table 81 - Forecast Off-trade Sales of Concentrates (RTD) by Category: % Volume Growth 2025-2030

Table 82 - Forecast Off-trade Sales of Concentrates by Category: Value 2025-2030

Table 83 - Forecast Off-trade Sales of Concentrates by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

[Juice in Denmark](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Slower shift between 100% juice and other juice types

INDUSTRY PERFORMANCE

High orange prices and alternatives to juice continue to hit the category in 2025

Growing array of health-positioned coconut and other plant waters

WHAT'S NEXT?

Bright spots in juice

New single-portion juice drinks to stimulate on-the-go demand

Strong growth projected for coconut and other plant waters through alignment with consumers' health-focused preferences

COMPETITIVE LANDSCAPE

Rynkeby Foods continues to invest in the category

Green Coco Europe gains from the fast growth of coconut and other plant waters

CHANNELS

Convenience and competitive pricing lure juice consumers to large modern grocery retailers

E-commerce emerges, albeit slowly, as a channel for juice

CATEGORY DATA

Table 84 - Off-trade Sales of Juice by Category: Volume 2020-2025

Table 85 - Off-trade Sales of Juice by Category: Value 2020-2025

Table 86 - Off-trade Sales of Juice by Category: % Volume Growth 2020-2025

Table 87 - Off-trade Sales of Juice by Category: % Value Growth 2020-2025

Table 88 - NBO Company Shares of Off-trade Juice: % Volume 2021-2025

Table 89 - LBN Brand Shares of Off-trade Juice: % Volume 2022-2025

Table 90 - NBO Company Shares of Off-trade Juice: % Value 2021-2025

Table 91 - LBN Brand Shares of Off-trade Juice: % Value 2022-2025

Table 92 - Forecast Off-trade Sales of Juice by Category: Volume 2025-2030

Table 93 - Forecast Off-trade Sales of Juice by Category: Value 2025-2030

Table 94 - Forecast Off-trade Sales of Juice by Category: % Volume Growth 2025-2030

Table 95 - Forecast Off-trade Sales of Juice by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

RTD Coffee in Denmark

KEY DATA FINDINGS

2025 DEVELOPMENTS

RTD coffee enjoys fast-growing popularity

INDUSTRY PERFORMANCE

Widening offer stimulates awareness and purchases

Both foodservice and on-the-go consumption on the rise

WHAT'S NEXT?

Healthier bent to the demand for RTD coffee

Younger consumers drive the development and growth in RTD coffee

Innovation to strengthen the category's position in soft drinks

COMPETITIVE LANDSCAPE

Segmentation to widen the choice and appeal of RTD coffee

New Lavazza option adds dynamism to the RTD coffee offer

CHANNELS

Large modern grocery retailers remain the first choice of consumers of RTD coffee

E-commerce sees high investment to make gains in RTD coffee distribution

CATEGORY DATA

Table 96 - Off-trade Sales of RTD Coffee: Volume 2020-2025

Table 97 - Off-trade Sales of RTD Coffee: Value 2020-2025

Table 98 - Off-trade Sales of RTD Coffee: % Volume Growth 2020-2025

Table 99 - Off-trade Sales of RTD Coffee: % Value Growth 2020-2025

Table 100 - NBO Company Shares of Off-trade RTD Coffee: % Volume 2021-2025

- Table 101 - LBN Brand Shares of Off-trade RTD Coffee: % Volume 2022-2025
- Table 102 - NBO Company Shares of Off-trade RTD Coffee: % Value 2021-2025
- Table 103 - LBN Brand Shares of Off-trade RTD Coffee: % Value 2022-2025
- Table 104 - Forecast Off-trade Sales of RTD Coffee: Volume 2025-2030
- Table 105 - Forecast Off-trade Sales of RTD Coffee: Value 2025-2030
- Table 106 - Forecast Off-trade Sales of RTD Coffee: % Volume Growth 2025-2030
- Table 107 - Forecast Off-trade Sales of RTD Coffee: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

RTD Tea in Denmark

KEY DATA FINDINGS

2025 DEVELOPMENTS

Move towards healthier options in RTD tea

INDUSTRY PERFORMANCE

Shift from regular to reduced sugar in still RTD tea

Kombucha rides health and wellness trend to stimulate fast growth

WHAT'S NEXT?

Kombucha to benefit from health positioning and local offerings

Wider options in packaging terms

Single-serve RTD tea retains significant growth potential

COMPETITIVE LANDSCAPE

Aqua D'Or Mineral Water leads through its strength in reduced sugar still RTD tea

Local kombucha players enjoy fast retail volume sales growth

CHANNELS

Large assortments at competitive prices lure consumers

E-commerce continues to develop as a significant channel for RTD tea

CATEGORY DATA

Table 108 - Off-trade Sales of RTD Tea by Category: Volume 2020-2025

Table 109 - Off-trade Sales of RTD Tea by Category: Value 2020-2025

Table 110 - Off-trade Sales of RTD Tea by Category: % Volume Growth 2020-2025

Table 111 - Off-trade Sales of RTD Tea by Category: % Value Growth 2020-2025

Table 112 - Leading Flavours for Off-trade RTD Tea: % Volume 2020-2025

Table 113 - NBO Company Shares of Off-trade RTD Tea: % Volume 2021-2025

Table 114 - LBN Brand Shares of Off-trade RTD Tea: % Volume 2022-2025

Table 115 - NBO Company Shares of Off-trade RTD Tea: % Value 2021-2025

Table 116 - LBN Brand Shares of Off-trade RTD Tea: % Value 2022-2025

Table 117 - Forecast Off-trade Sales of RTD Tea by Category: Volume 2025-2030

Table 118 - Forecast Off-trade Sales of RTD Tea by Category: Value 2025-2030

Table 119 - Forecast Off-trade Sales of RTD Tea by Category: % Volume Growth 2025-2030

Table 120 - Forecast Off-trade Sales of RTD Tea by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

Energy Drinks in Denmark

KEY DATA FINDINGS

2025 DEVELOPMENTS

Younger cohorts boost energy drinks

INDUSTRY PERFORMANCE

Loyal consumer base for energy drinks

Health and wellness trend and new launches stimulate reduced sugar energy drinks

WHAT'S NEXT?

The consumer base is set to diversify in demographic and consumption terms

New Nailed Energy offering can point the way forward for new launches

Health-orientated hybrids offer growth potential

COMPETITIVE LANDSCAPE

Wide portfolio and relaunches help Royal Unibrew extend its lead

Harboes Bryggeri develops its Nailed Energy offer to drive growth

CHANNELS

Price-sensitive purchasing favours discounters

E-commerce development impacts energy drinks distribution

CATEGORY DATA

Table 121 - Off-trade Sales of Energy Drinks: Volume 2020-2025

Table 122 - Off-trade Sales of Energy Drinks: Value 2020-2025

Table 123 - Off-trade Sales of Energy Drinks: % Volume Growth 2020-2025

Table 124 - Off-trade Sales of Energy Drinks: % Value Growth 2020-2025

Table 125 - NBO Company Shares of Off-trade Energy Drinks: % Volume 2021-2025

Table 126 - LBN Brand Shares of Off-trade Energy Drinks: % Volume 2022-2025

Table 127 - NBO Company Shares of Off-trade Energy Drinks: % Value 2021-2025

Table 128 - LBN Brand Shares of Off-trade Energy Drinks: % Value 2022-2025

Table 129 - Forecast Off-trade Sales of Energy Drinks: Volume 2025-2030

Table 130 - Forecast Off-trade Sales of Energy Drinks: Value 2025-2030

Table 131 - Forecast Off-trade Sales of Energy Drinks: % Volume Growth 2025-2030

Table 132 - Forecast Off-trade Sales of Energy Drinks: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

[Sports Drinks in Denmark](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Moderate retail volume growth in a volatile category

INDUSTRY PERFORMANCE

New offering continues to provide impetus for regular sports drinks

Interest in reduced sugar sports drinks remains very low despite price drops

WHAT'S NEXT?

Wider selections and availability to boost take up

Strong growth from a low base as the offer develops

New formulations to target health benefits

COMPETITIVE LANDSCAPE

Local player introduces dynamic new offering to surge ahead of the field

Faxe Kondi also benefits from a focus on local brands

CHANNELS

Sports drinks starts to occupy more retail shelf space

Price-based promotions lure sports drinks consumers to discounters

CATEGORY DATA

Table 133 - Off-trade Sales of Sports Drinks: Volume 2020-2025

Table 134 - Off-trade Sales of Sports Drinks: Value 2020-2025

Table 135 - Off-trade Sales of Sports Drinks: % Volume Growth 2020-2025

Table 136 - Off-trade Sales of Sports Drinks: % Value Growth 2020-2025

Table 137 - NBO Company Shares of Off-trade Sports Drinks: % Volume 2021-2025

Table 138 - LBN Brand Shares of Off-trade Sports Drinks: % Volume 2022-2025

Table 139 - NBO Company Shares of Off-trade Sports Drinks: % Value 2021-2025

Table 140 - LBN Brand Shares of Off-trade Sports Drinks: % Value 2022-2025

Table 141 - Forecast Off-trade Sales of Sports Drinks: Volume 2025-2030

Table 142 - Forecast Off-trade Sales of Sports Drinks: Value 2025-2030

Table 143 - Forecast Off-trade Sales of Sports Drinks: % Volume Growth 2025-2030

Table 144 - Forecast Off-trade Sales of Sports Drinks: % Value Growth 2025-2030

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