



Soft Drinks in Sweden

December 2025

Table of Contents

Soft Drinks in Sweden

EXECUTIVE SUMMARY

Soft drinks sees a more favourable performance in 2025

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Functional soft drinks prove popular in 2025

Reducing sugar intake a pressing concern for Swedes

Products with a clear health and wellness positioning find favour

WHAT'S NEXT?

Consumer preferences evolving with juice losing favour while demand for energy drinks rises

New flavours present opportunities for differentiation

Digital marketing and social media could be key to growth

COMPETITIVE LANDSCAPE

Coca-Cola continues to invest heavily in new product development and marketing

Löfbergs riding the wave of success in RTD coffee

CHANNELS

Supermarkets lead retail sales as on-trade sales continue to recover

Discounters winning over price-sensitive shoppers

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 Sweden

COUNTRY REPORTS DISCLAIMER

SOURCES

Summary 1 - Research Sources

Bottled Water in Sweden

KEY DATA FINDINGS

2025 DEVELOPMENTS

New product development adds variety to the market

INDUSTRY PERFORMANCE

Stable prices and high temperatures boost sales of bottled water in 2025

Functional bottled water a hotbed of activity as demand grows

WHAT'S NEXT?

Bottled water still has room to grow as consumers make healthier choices

New technology helping players to deliver healthier and more sustainable products

Delivering healthier options will be a focus of new product development

COMPETITIVE LANDSCAPE

Spendrups Bryggeri cements its lead through new product development

Latitude 65 finding success in functional bottled water

CHANNELS

Supermarkets remains the key channel for sales of bottled water

Discounters expanding and growing thanks to strong value proposition

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 Sweden

KEY DATA FINDINGS

2025 DEVELOPMENTS

Players responding to growing demand for reduced sugar carbonates

INDUSTRY PERFORMANCE

A positive year for carbonates as consumers embrace zero sugar variants

Coca-Cola launches Tutti Frutti Fanta as consumers embrace novel and sugar free options

WHAT'S NEXT?

Reduced sugar carbonates set to remain the key growth driver

Deposit on cans and bottles rises

Players likely to focus on promoting a healthier image

COMPETITIVE LANDSCAPE

Coca-Cola maintains its dominant position in 2025

Private label gains share thanks to increasing price sensitivity

CHANNELS

Supermarkets remain on top despite increasing competition

E-commerce making inroads but from a small base

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 Sweden

KEY DATA FINDINGS

2025 DEVELOPMENTS

Another tough year for concentrates as consumers favour RTD alternatives

INDUSTRY PERFORMANCE

Concentrates suffering from an old-fashioned and unhealthy image

Powder concentrates benefits from a more favourable positioning

WHAT'S NEXT?

Concentrates expected to suffer from a lack of investment or interest

Concentrates may need to rely on established consumer base with limited room for innovation

Presenting an affordable and sustainable image could be key to growth

COMPETITIVE LANDSCAPE

Orkla Foods and SodaStream remain the big names in concentrates

Private label the big winner as consumers go in search of cost savings

CHANNELS

Supermarkets benefit from offering a wider range of products

Discounters meet the need for affordable soft drinks

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 Sweden](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

A tough year for juice due to orange shortage

INDUSTRY PERFORMANCE

Shortage of oranges has a negative impact on the market

Nectars benefits from a more affordable positioning

WHAT'S NEXT?

Orange shortage expected to remain a challenge for juice companies

Digital tools present new opportunities but health concerns present a challenge

Declining birth rate could push players to adjust their portfolios

COMPETITIVE LANDSCAPE

Proviva cements its lead in juice through its affordability, marketing and new flavours

Foco continues to see success with line of healthy coconut water

CHANNELS

Supermarkets dominate sales thanks to their varied offer and convenience

Discounters benefit from price increases in the market

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 Sweden

KEY DATA FINDINGS

2025 DEVELOPMENTS

RTD coffee still thriving despite rising prices

INDUSTRY PERFORMANCE

RTD coffee sees strong growth despite price increases

RTD coffee remains a niche area due to preference for hot coffee

WHAT'S NEXT?

Global iced coffee trend should benefit the market

Introducing shelf stable products could be key to expansion

Healthier options likely to appear in the market

COMPETITIVE LANDSCAPE

Arla remains on top with ongoing investment in new product development

Leading local coffee company making its mark in RTD coffee

CHANNELS

Supermarkets lead sales

Discounters benefiting from challenging economic climate

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 Sweden

KEY DATA FINDINGS

2025 DEVELOPMENTS

RTD tea struggling to attract the attention of a mass audience

INDUSTRY PERFORMANCE

RTD tea remains a relatively niche category with limited appeal to Swedes
Kombucha remains a dynamic area of the market thanks to its healthy image

WHAT'S NEXT?

Healthier options offer promise but overall sales of RTD tea are expected to decline
Further investment will be needed to reinvigorate the market
Investment will be needed to explore the market's potential

COMPETITIVE LANDSCAPE

Pfanner Ice Tea looking to branch out into reduced sugar still RTD tea
Humm Europe thriving thanks to the healthy image of kombucha

CHANNELS

Supermarkets offer variety and convenience
Discounters win share thanks to strong value proposition

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 Sweden

KEY DATA FINDINGS

2025 DEVELOPMENTS

Energy drinks successfully tapping into the needs of Sweden's youths

INDUSTRY PERFORMANCE

Energy drinks thriving thanks to growing popularity among younger consumers

Reduced sugar products benefit from new product development

WHAT'S NEXT?

Energy drinks still full of potential

Digital marketing will become a growing feature of the market

Health and wellness concerns present challenges and opportunities

COMPETITIVE LANDSCAPE

Red Bull remains on top but Nocco makes up ground with reduced sugar range

Latitude 65 finding success with new and innovative flavours

CHANNELS

Supermarkets lead sales by meeting the requirements of energy drinks brands

Convenience is key for purchases of energy drinks

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 Sweden](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Sales continue to decline in 2025 as Prime Hydration falls out of the spotlight

INDUSTRY PERFORMANCE

A tough year for sports drinks as Prime Hydration loses its appeal

A lack of activity limits the category's growth potential

WHAT'S NEXT?

Bright outlook for sports drinks

Digital marketing set to play a central role in the market's development

Health and sustainability will be key pillars of the category

COMPETITIVE LANDSCAPE

Powerade benefits from new product development

Vitamin Well Sport promoted as offering a 'next generation' line of sports drinks

CHANNELS

Supermarkets dominate thanks to the accessibility, variety and value they offer

Small local grocers tap into the impulse nature of sports drinks

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

COUNTRY REPORTS DISCLAIMER

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/soft-drinks-in-sweden/report.