

Carbonates in Denmark

December 2025

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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

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Discounters leverage competitive pricing initiatives to lead distribution

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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

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