



# Carbonates in Denmark

December 2025

Table of Contents

## Carbonates in Denmark - Category analysis

### 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 1 - Off-trade vs On-trade Sales of Carbonates: Volume 2020-2025

Table 2 - Off-trade vs On-trade Sales of Carbonates: Value 2020-2025

Table 3 - Off-trade vs On-trade Sales of Carbonates: % Volume Growth 2020-2025

Table 4 - Off-trade vs On-trade Sales of Carbonates: % Value Growth 2020-2025

Table 5 - Off-trade Sales of Carbonates by Category: Volume 2020-2025

Table 6 - Off-trade Sales of Carbonates by Category: Value 2020-2025

Table 7 - Off-trade Sales of Carbonates by Category: % Volume Growth 2020-2025

Table 8 - Off-trade Sales of Carbonates by Category: % Value Growth 2020-2025

Table 9 - Total Sales of Carbonates by Fountain On-trade: Volume 2020-2025

Table 10 - Total Sales of Carbonates by Fountain On-trade: % Volume Growth 2020-2025

Table 11 - NBO Company Shares of Off-trade Carbonates: % Volume 2021-2025

Table 12 - LBN Brand Shares of Off-trade Carbonates: % Volume 2022-2025

Table 13 - NBO Company Shares of Off-trade Carbonates: % Value 2021-2025

Table 14 - LBN Brand Shares of Off-trade Carbonates: % Value 2022-2025

Table 15 - Forecast Off-trade Sales of Carbonates by Category: Volume 2025-2030

Table 16 - Forecast Off-trade Sales of Carbonates by Category: Value 2025-2030

Table 17 - Forecast Off-trade Sales of Carbonates by Category: % Volume Growth 2025-2030

Table 18 - Forecast Off-trade Sales of Carbonates by Category: % Value Growth 2025-2030

Table 19 - Forecast Total Sales of Carbonates by Fountain On-trade: Volume 2025-2030

Table 20 - Forecast Total Sales of Carbonates by Fountain On-trade: % Volume Growth 2025-2030

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## Soft Drinks in Denmark - Industry Overview

### 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 21 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2020-2025  
Table 22 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2020-2025  
Table 23 - Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2020-2025  
Table 24 - Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2020-2025  
Table 25 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: Volume 2025  
Table 26 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: % Volume 2025  
Table 27 - Off-trade vs On-trade Sales of Soft Drinks by Category: Value 2025  
Table 28 - Off-trade vs On-trade Sales of Soft Drinks by Category: % Value 2025  
Table 29 - Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2020-2025  
Table 30 - Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2020-2025  
Table 31 - Off-trade Sales of Soft Drinks by Category: Value 2020-2025  
Table 32 - Off-trade Sales of Soft Drinks by Category: % Value Growth 2020-2025  
Table 33 - Sales of Soft Drinks by Total Fountain On-trade: Volume 2020-2025  
Table 34 - Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2020-2025  
Table 35 - NBO Company Shares of Total Soft Drinks (RTD): % Volume 2021-2025  
Table 36 - LBN Brand Shares of Total Soft Drinks (RTD): % Volume 2022-2025  
Table 37 - NBO Company Shares of On-trade Soft Drinks (RTD): % Volume 2021-2025  
Table 38 - LBN Brand Shares of On-trade Soft Drinks (RTD): % Volume 2022-2025  
Table 39 - NBO Company Shares of Off-trade Soft Drinks (RTD): % Volume 2021-2025  
Table 40 - LBN Brand Shares of Off-trade Soft Drinks (RTD): % Volume 2022-2025  
Table 41 - NBO Company Shares of Off-trade Soft Drinks: % Value 2021-2025  
Table 42 - LBN Brand Shares of Off-trade Soft Drinks: % Value 2022-2025  
Table 43 - Penetration of Private Label in Off-trade Soft Drinks (RTD) by Category: % Volume 2020-2025  
Table 44 - Penetration of Private Label in Off-trade Soft Drinks by Category: % Value 2020-2025  
Table 45 - Distribution of Off-trade Soft Drinks (as sold) by Format: % Volume 2020-2025  
Table 46 - Distribution of Off-trade Soft Drinks (as sold) by Format and Category: % Volume 2025  
Table 47 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2025-2030  
Table 48 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2025-2030  
Table 49 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2025-2030  
Table 50 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2025-2030  
Table 51 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2025-2030  
Table 52 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2025-2030  
Table 53 - Forecast Off-trade Sales of Soft Drinks by Category: Value 2025-2030  
Table 54 - Forecast Off-trade Sales of Soft Drinks by Category: % Value Growth 2025-2030

Table 55 - Forecast Sales of Soft Drinks by Total Fountain On-trade: Volume 2025-2030

Table 56 - 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

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