



# Carbonates in Singapore

November 2025

Table of Contents

## Carbonates in Singapore - Category analysis

### KEY DATA FINDINGS

#### 2025 DEVELOPMENTS

Rising health concerns limit growth opportunities within carbonates

#### INDUSTRY PERFORMANCE

Retail growth reflects expanding health trends, while on-trade sales face challenges

Consumers steer towards healthier options

#### WHAT'S NEXT?

Similar growth patterns predicted for the forecast period

Coca-Cola Singapore enhances sustainability and innovations

Exotic flavours finding success in carbonates

#### COMPETITIVE LANDSCAPE

Coca-Cola finds success by adapting to evolving consumer health trends

Etika Beverages and F&N

#### CHANNELS

Supermarkets lead sales of carbonates but e-commerce is the most dynamic channel

On-trade sales drop but players still find opportunities in the channel

#### 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

#### COUNTRY REPORTS DISCLAIMER

## Soft Drinks in Singapore - Industry Overview

### EXECUTIVE SUMMARY

Soft drinks sales rise with a focus on health and convenience

### KEY DATA FINDINGS

## INDUSTRY PERFORMANCE

Sales of soft drinks on the rise but players under pressure to adapt to evolving trends

Consumers looking for healthier options

Soft drinks continues to benefit from a strong focus on innovation

## WHAT'S NEXT?

Sales set to grow fuelled by evolving consumer preferences and new innovations

Consumers expected to lean towards healthier options

Convenience and sustainability concerns likely to inform packaging choices

## COMPETITIVE LANDSCAPE

Coca-Cola cements its lead with strong portfolio of brands and products

F&N Foods and Pokka Corp continue to invest in innovative and healthier options

## CHANNELS

Supermarkets retain a key role in the distribution of soft drinks

Retail vs 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 Singapore

## COUNTRY REPORTS DISCLAIMER

## SOURCES

Summary 1 - Research Sources

### 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/carbonates-in-singapore/report](http://www.euromonitor.com/carbonates-in-singapore/report).