



Carbonates in Belgium

November 2025

Table of Contents

Carbonates in Belgium - Category analysis

KEY DATA FINDINGS

2025 DEVELOPMENTS

Growth for carbonates in 2025 as outdoor consumption increases

INDUSTRY PERFORMANCE

Exceptionally good weather and higher prices boost a category otherwise in decline

Demand for novel flavours benefits non-cola carbonates in 2025

WHAT'S NEXT?

Decline predicted without support of good weather

Health-driven innovation and channel shift will shape the landscape

Stricter marketing rules could weigh on category performance

COMPETITIVE LANDSCAPE

Coca-Cola Belgium maintains leadership through innovation and engagement

Private label benefits from widespread price-consciousness amid high inflation

CHANNELS

Supermarkets lead, thanks to ability to offer wide range of products across the price spectrum

Discounters and proximity retailers gain ground

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 Belgium - Industry Overview

EXECUTIVE SUMMARY

Soft drinks in 2025: The big picture

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Buoyant performance for Belgian soft drinks in 2025
Functionality remains a key driver of innovation and growth
Smaller pack sizes are becoming increasingly common

WHAT'S NEXT?

Growth moderation predicted over the forecast period
Functionality will remain a focus growth area
Distribution landscape may need to diversify

COMPETITIVE LANDSCAPE

Coca-Cola continues to benefit from strong brand recognition and widespread distribution
foodPickers benefits from functionality trend

CHANNELS

Supermarkets and discounters continue to lead distribution in 2025
Proximity retailers continue to gain ground
Foodservice vs retail 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 Belgium

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SOURCES

Summary 1 - Research Sources

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