



Euromonitor
International

Carbonates in Japan

November 2025

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KEY DATA FINDINGS

2025 PERFORMANCE

A tough year for carbonates as prices rise again

INDUSTRY PERFORMANCE

Price increases place downward pressure on retail volume sales of carbonates

Heatwaves have a negative impact on sales

WHAT'S NEXT?

Volume sales set to decline but opportunities still exist to add value

Players will need to adapt to the demographic shifts being seen within Japan

Functional carbonates: a shift towards health and wellness

COMPETITIVE LANDSCAPE

Leading players tap into nostalgia with retro-inspired products

Players also look to the future with new innovations

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Distribution shifting towards e-commerce as consumers embrace label-less products

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Soft Drinks in Japan - Industry Overview

EXECUTIVE SUMMARY

Rising prices put pressure on volume sales in 2025

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INDUSTRY PERFORMANCE

Price rises lead to a decline in off-trade volume sales of soft drinks in 2025

Functional soft drinks gain prominence

Innovation has become faster, riskier, and more culturally embedded

WHAT'S NEXT?

Shrinking population likely to limit opportunities for volume growth

Healthy and natural products likely to attract more interest moving forward

Vending evolving as it looks to meet the needs of modern consumers

COMPETITIVE LANDSCAPE

Coca-Cola and Suntory continue to invest in product development and innovation

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