

# Soft Drinks in Japan

Market Direction | 2024-12-17 | 105 pages | Euromonitor

## **AVAILABLE LICENSES:**

- Single User Licence €2150.00
- Multiple User License (1 Site) €4300.00
- Multiple User License (Global) €6450.00

## Report description:

After the price increases that began in 2022, many soft drinks categories failed to achieve off-trade volume growth in Japan in 2023, and this trend is set to continue in 2024. Meanwhile, categories that experienced growth due to the recovery in consumer movement in 2023, such as RTD coffee and sports drinks, are also set to see a negative turn in 2024. Ready-to-drink (RTD) tea and other categories with a large customer base have also been significantly impacted by the declining population, prom...

Euromonitor International's Soft Drinks in Japan report offers a comprehensive guide to the size and shape of the market at a national level. It provides the latest retail sales data (2019-2023), allowing you to identify the sectors driving growth. It identifies the leading companies, the leading brands and offers strategic analysis of key factors influencing the market - be they legislative, distribution, packaging or pricing issues. Forecasts to 2028 illustrate how the market is set to change.

Product coverage: Asian Speciality Drinks, Bottled Water, Carbonates, Concentrates, Energy Drinks, Juice, RTD Coffee, RTD Tea, Sports Drinks.

Data coverage: market sizes (historic and forecasts), company shares, brand shares and distribution data.

Why buy this report?

- \* Get a detailed picture of the Soft Drinks market;
- \* Pinpoint growth sectors and identify factors driving change;
- \* Understand the competitive environment, the market's major players and leading brands;
- \* Use five-year forecasts to assess how the market is predicted to develop.

Euromonitor International has over 40 years' experience of publishing market research reports, business reference books and online information systems. With offices in London, Chicago, Singapore, Shanghai, Vilnius, Dubai, Cape Town, Santiago, Sydney, Tokyo and Bangalore and a network of over 800 analysts worldwide, Euromonitor International has a unique capability to develop reliable information resources to help drive informed strategic planning.

## **Table of Contents:**

Soft Drinks in Japan Euromonitor International December 2024

List Of Contents And Tables

SOFT DRINKS IN JAPAN EXECUTIVE SUMMARY

Soft drinks in 2024: The big picture

2024 key trends

Competitive landscape

Retailing developments

Foodservice vs retail split

What next for soft drinks?

MARKET DATA

Table 1 Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2019-2024

Table 2 Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2019-2024

Table 3 Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2019-2024

Table 4 Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2019-2024

Table 5 Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: Volume 2024

Table 6 Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: % Volume 2024

Table 7 Off-trade vs On-trade Sales of Soft Drinks by Category: Value 2024

Table 8 Off-trade vs On-trade Sales of Soft Drinks by Category: % Value 2024

Table 9 Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2019-2024

Table 10 ∏Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2019-2024

Table 11 Off-trade Sales of Soft Drinks by Category: Value 2019-2024

Table 12 ☐Off-trade Sales of Soft Drinks by Category: % Value Growth 2019-2024

Table 13 Sales of Soft Drinks by Total Fountain On-trade: Volume 2019-2024

Table 14 [Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2019-2024

Table 15 ☐NBO Company Shares of Total Soft Drinks (RTD): % Volume 2020-2024

Table 16 ☐LBN Brand Shares of Total Soft Drinks (RTD): % Volume 2021-2024

Table 17 ☐NBO Company Shares of On-trade Soft Drinks (RTD): % Volume 2020-2024

Table 18 [LBN Brand Shares of On-trade Soft Drinks (RTD): % Volume 2021-2024

Table 19 

☐NBO Company Shares of Off-trade Soft Drinks (RTD): % Volume 2020-2024

Table 20  $\square$ LBN Brand Shares of Off-trade Soft Drinks (RTD): % Volume 2021-2024

Table 21 NBO Company Shares of Off-trade Soft Drinks: % Value 2020-2024

Table 22 [LBN Brand Shares of Off-trade Soft Drinks: % Value 2021-2024

Table 23 [Penetration of Private Label in Off-trade Soft Drinks (RTD) by Category: % Volume 2019-2024

Table 24 ☐ Penetration of Private Label in Off-trade Soft Drinks by Category: % Value 2019-2024

Table 25 [Distribution of Off-trade Soft Drinks (as sold) by Format: % Volume 2019-2024

Table 26  $\square$ Distribution of Off-trade Soft Drinks (as sold) by Format and Category: % Volume 2024

Table 27 ∏Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2024-2029

Table 28 | Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2024-2029

Table 29 [Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2024-2029

Table 30 [Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2024-2029

Table 31 [Forecast Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2024-2029

Scotts International, EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com www.scotts-international.com

Table 32 [Forecast Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2024-2029

Table 33 [Forecast Off-trade Sales of Soft Drinks by Category: Value 2024-2029

Table 34 ∏Forecast Off-trade Sales of Soft Drinks by Category: % Value Growth 2024-2029

Table 35 | Forecast Sales of Soft Drinks by Total Fountain On-trade: Volume 2024-2029

Table 36 ∏Forecast Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2024-2029

**APPENDIX** 

Fountain sales in Japan

**Trends** 

**DISCLAIMER** 

**SOURCES** 

Summary 1 Research Sources

CARBONATES IN JAPAN

**KEY DATA FINDINGS** 

2024 DEVELOPMENTS

Carbonates sees tough competition from bottled water and RTD tea

After growth in 2023, cola carbonates faces decline in 2024

Nostalgia trend shapes carbonates

PROSPECTS AND OPPORTUNITIES

Declining birth rate and health trend threaten carbonates in Japan

On-trade sales set to continue to recover, but fail to reach the pre-pandemic level

New concepts set to emerge as consumers value innovation

**CATEGORY DATA** 

Table 37 Off-trade vs On-trade Sales of Carbonates: Volume 2019-2024

Table 38 Off-trade vs On-trade Sales of Carbonates: Value 2019-2024

Table 39 Off-trade vs On-trade Sales of Carbonates: % Volume Growth 2019-2024

Table 40 Off-trade vs On-trade Sales of Carbonates: % Value Growth 2019-2024

Table 41 Off-trade Sales of Carbonates by Category: Volume 2019-2024

Table 42 Off-trade Sales of Carbonates by Category: Value 2019-2024

Table 43 Off-trade Sales of Carbonates by Category: % Volume Growth 2019-2024

Table 44 Off-trade Sales of Carbonates by Category: % Value Growth 2019-2024

Table 45 Total Sales of Carbonates by Fountain On-trade: Volume 2019-2024

Table 46 ∏Total Sales of Carbonates by Fountain On-trade: % Volume Growth 2019-2024

Table 47 □NBO Company Shares of Off-trade Carbonates: % Volume 2020-2024

Table 48 [LBN Brand Shares of Off-trade Carbonates: % Volume 2021-2024

Table 49 ☐NBO Company Shares of Off-trade Carbonates: % Value 2020-2024

Table 50 ☐LBN Brand Shares of Off-trade Carbonates: % Value 2021-2024

Table 51 [Forecast Off-trade Sales of Carbonates by Category: Volume 2024-2029

Table 52 | Forecast Off-trade Sales of Carbonates by Category: Value 2024-2029

Table 53 | Forecast Off-trade Sales of Carbonates by Category: % Volume Growth 2024-2029

Table 54 ∏Forecast Off-trade Sales of Carbonates by Category: % Value Growth 2024-2029

Table 55 | Forecast Total Sales of Carbonates by Fountain On-trade: Volume 2024-2029

Table 56 [Forecast Total Sales of Carbonates by Fountain On-trade: % Volume Growth 2024-2029

JUICE IN JAPAN

**KEY DATA FINDINGS** 

2024 DEVELOPMENTS

Volume sales of juice decline as prices soar in 2024

Tomato juice thrives in a challenging market

Scotts International, EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

Kagome maintains its lead in juice

PROSPECTS AND OPPORTUNITIES

Juice set to struggle as Japan's population shrinks

Companies strive to discover the next hit ingredient

Health consciousness expected to have differing effects on demand for juice

#### **CATEGORY DATA**

Table 57 Off-trade Sales of Juice by Category: Volume 2019-2024

Table 58 Off-trade Sales of Juice by Category: Value 2019-2024

Table 59 Off-trade Sales of Juice by Category: % Volume Growth 2019-2024

Table 60 Off-trade Sales of Juice by Category: % Value Growth 2019-2024

Table 61 NBO Company Shares of Off-trade Juice: % Volume 2020-2024

Table 62 LBN Brand Shares of Off-trade Juice: % Volume 2021-2024

Table 63 NBO Company Shares of Off-trade Juice: % Value 2020-2024

Table 64 LBN Brand Shares of Off-trade Juice: % Value 2021-2024

Table 65 Forecast Off-trade Sales of Juice by Category: Volume 2024-2029

Table 66 [Forecast Off-trade Sales of Juice by Category: Value 2024-2029

Table 67 ∏Forecast Off-trade Sales of Juice by Category: % Volume Growth 2024-2029

Table 68 | Forecast Off-trade Sales of Juice by Category: % Value Growth 2024-2029

**BOTTLED WATER IN JAPAN** 

**KEY DATA FINDINGS** 

2024 DEVELOPMENTS

Prices rise, but demand for bottled water remains high

The carbonated/sparkling water trend starts to cool down

Suntory leads bottled water, but some consumers turn to private label

PROSPECTS AND OPPORTUNITIES

Demand for bottled water demand will remain high in Japan amidst earthquake fears and pandemic lessons

Suntory launches home water purification products

Rise in products fortified with dietary fibre

## **CATEGORY DATA**

Table 69 Off-trade Sales of Bottled Water by Category: Volume 2019-2024

Table 70 Off-trade Sales of Bottled Water by Category: Value 2019-2024

Table 71 Off-trade Sales of Bottled Water by Category: % Volume Growth 2019-2024

Table 72 Off-trade Sales of Bottled Water by Category: % Value Growth 2019-2024

Table 73 NBO Company Shares of Off-trade Bottled Water: % Volume 2020-2024

Table 74 LBN Brand Shares of Off-trade Bottled Water: % Volume 2021-2024

Table 75 NBO Company Shares of Off-trade Bottled Water: % Value 2020-2024

Table 76 LBN Brand Shares of Off-trade Bottled Water: % Value 2021-2024

Table 77 Forecast Off-trade Sales of Bottled Water by Category: Volume 2024-2029

Table 78 [Forecast Off-trade Sales of Bottled Water by Category: Value 2024-2029

Table 79 [Forecast Off-trade Sales of Bottled Water by Category: % Volume Growth 2024-2029

Table 80 [Forecast Off-trade Sales of Bottled Water by Category: % Value Growth 2024-2029

SPORTS DRINKS IN JAPAN

**KEY DATA FINDINGS** 

2024 DEVELOPMENTS

Sports drinks struggles as some consumers turn to cheaper hydration options

Importance of heatstroke prevention amidst intensifying competition

Major brands collaborate with the government and retailers to promote heatstroke prevention

Scotts International, EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

#### PROSPECTS AND OPPORTUNITIES

Sports drinks faces further decline as health-conscious consumers choose alternatives

Shift towards functional beverages for health maintenance

Older people are a valuable target demographic

**CATEGORY DATA** 

Table 81 Off-trade Sales of Sports Drinks: Volume 2019-2024

Table 82 Off-trade Sales of Sports Drinks: Value 2019-2024

Table 83 Off-trade Sales of Sports Drinks: % Volume Growth 2019-2024

Table 84 Off-trade Sales of Sports Drinks: % Value Growth 2019-2024

Table 85 NBO Company Shares of Off-trade Sports Drinks: % Volume 2020-2024

Table 86 LBN Brand Shares of Off-trade Sports Drinks: % Volume 2021-2024

Table 87 NBO Company Shares of Off-trade Sports Drinks: % Value 2020-2024

Table 88 LBN Brand Shares of Off-trade Sports Drinks: % Value 2021-2024

Table 89 Forecast Off-trade Sales of Sports Drinks: Volume 2024-2029

Table 90 ☐Forecast Off-trade Sales of Sports Drinks: Value 2024-2029

Table 91 ☐Forecast Off-trade Sales of Sports Drinks: % Volume Growth 2024-2029

Table 92 | Forecast Off-trade Sales of Sports Drinks: % Value Growth 2024-2029

**ENERGY DRINKS IN JAPAN** 

**KEY DATA FINDINGS** 

2024 DEVELOPMENTS

Energy drinks faces crisis as prices rise and sales plummet

More consumers focus on caffeine management

Asahi Soft Drinks Co Ltd leads energy drinks in Japan

PROSPECTS AND OPPORTUNITIES

Energy drinks must adapt to an ageing consumer base and capture youth interest

Natural energy drinks underdeveloped in Japan

Relaxation drinks is expanding

**CATEGORY DATA** 

Table 93 Off-trade Sales of Energy Drinks: Volume 2019-2024

Table 94 Off-trade Sales of Energy Drinks: Value 2019-2024

Table 95 Off-trade Sales of Energy Drinks: % Volume Growth 2019-2024

Table 96 Off-trade Sales of Energy Drinks: % Value Growth 2019-2024

Table 97 NBO Company Shares of Off-trade Energy Drinks: % Volume 2020-2024

Table 98 LBN Brand Shares of Off-trade Energy Drinks: % Volume 2021-2024

Table 99 NBO Company Shares of Off-trade Energy Drinks: % Value 2020-2024

Table 100 LBN Brand Shares of Off-trade Energy Drinks: % Value 2021-2024

Table 101 Forecast Off-trade Sales of Energy Drinks: Volume 2024-2029

Table 102 ☐Forecast Off-trade Sales of Energy Drinks: Value 2024-2029

Table 103  $\square$ Forecast Off-trade Sales of Energy Drinks: % Volume Growth 2024-2029

Table 104 [Forecast Off-trade Sales of Energy Drinks: % Value Growth 2024-2029

**CONCENTRATES IN JAPAN** 

**KEY DATA FINDINGS** 

2024 DEVELOPMENTS

Liquid concentrates faces notable decline as consumers return to outdoor activities

Craft cola and ginger ale remain popular

Asahi maintains its lead but other players make their mark

PROSPECTS AND OPPORTUNITIES

Scotts International, EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

Liquid concentrates adapt as consumers shift towards convenience and creativity Powder concentrates set to continue to decline, but may be marketed as eco-friendly Health benefits will continue to be significant

#### CATEGORY DATA

Concentrates conversions

Summary 2 Concentrates Conversion Factors for Ready-to-Drink (RTD) Format

Table 105 Off-trade Sales of Concentrates (RTD) by Category: Volume 2019-2024

Table 106 Off-trade Sales of Concentrates (RTD) by Category: % Volume Growth 2019-2024

Table 107 Off-trade Sales of Concentrates by Category: Value 2019-2024

Table 108 Off-trade Sales of Concentrates by Category: % Value Growth 2019-2024

Table 109 LBN Brand Shares of Off-trade Concentrates (RTD): % Volume 2021-2024

Table 110 NBO Company Shares of Off-trade Concentrates: % Value 2020-2024

Table 111 LBN Brand Shares of Off-trade Concentrates: % Value 2021-2024

Table 112 NBO Company Shares of Off-trade Liquid Concentrates (RTD): % Volume 2020-2024

Table 113 LBN Brand Shares of Off-trade Liquid Concentrates (RTD): % Volume 2021-2024

Table 114 [NBO Company Shares of Off-trade Powder Concentrates (RTD): % Volume 2020-2024

Table 115 [LBN Brand Shares of Off-trade Powder Concentrates (RTD): % Volume 2021-2024

Table 116 ∏Forecast Off-trade Sales of Concentrates (RTD) by Category: Volume 2024-2029

Table 117 [Forecast Off-trade Sales of Concentrates (RTD) by Category: % Volume Growth 2024-2029

Table 118 ∏Forecast Off-trade Sales of Concentrates by Category: Value 2024-2029

Table 119 [Forecast Off-trade Sales of Concentrates by Category: % Value Growth 2024-2029

RTD TEA IN JAPAN

**KEY DATA FINDINGS** 

2024 DEVELOPMENTS

Green tea continues to lead RTD tea

Price gap widens between national brands and private label products

ITO EN Ltd remains the top player in tea

PROSPECTS AND OPPORTUNITIES

Functional innovations expected to continue in RTD tea

Kirin plans to invest in RTD black tea

Tea Ade and Asian tea culture find success in RTD format

**CATEGORY DATA** 

Table 120 Off-trade Sales of RTD Tea by Category: Volume 2019-2024

Table 121 Off-trade Sales of RTD Tea by Category: Value 2019-2024

Table 122 Off-trade Sales of RTD Tea by Category: % Volume Growth 2019-2024

Table 123 Off-trade Sales of RTD Tea by Category: % Value Growth 2019-2024

Table 124 Leading Flavours for Off-trade RTD Tea: % Volume 2019-2024

Table 125 NBO Company Shares of Off-trade RTD Tea: % Volume 2020-2024

Table 126 LBN Brand Shares of Off-trade RTD Tea: % Volume 2021-2024

Table 127 NBO Company Shares of Off-trade RTD Tea: % Value 2020-2024

Table 128 LBN Brand Shares of Off-trade RTD Tea: % Value 2021-2024

Table 129 [Forecast Off-trade Sales of RTD Tea by Category: Volume 2024-2029

Table 130 [Forecast Off-trade Sales of RTD Tea by Category: Value 2024-2029

Table 131 ∏Forecast Off-trade Sales of RTD Tea by Category: % Volume Growth 2024-2029

Table 132 ∏Forecast Off-trade Sales of RTD Tea by Category: % Value Growth 2024-2029

RTD COFFEE IN JAPAN

**KEY DATA FINDINGS** 

Scotts International, EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

#### 2024 DEVELOPMENTS

Heatwaves and price increases drive down sales of RTD coffee in Japan

New products featuring plant-based milk are rapidly emerging in Japan

Suntory regains its leading position in RTD coffee

## PROSPECTS AND OPPORTUNITIES

RTD coffee faces further decline as consumers shift away from canned convenience

Functional RTD coffee is underdeveloped in Japan

Shift from cans to PET bottles and paper cartons to drive changes

## **CATEGORY DATA**

Table 133 Off-trade Sales of RTD Coffee: Volume 2019-2024

Table 134 Off-trade Sales of RTD Coffee: Value 2019-2024

Table 135 Off-trade Sales of RTD Coffee: % Volume Growth 2019-2024

Table 136 Off-trade Sales of RTD Coffee: % Value Growth 2019-2024

Table 137 NBO Company Shares of Off-trade RTD Coffee: % Volume 2020-2024

Table 138 LBN Brand Shares of Off-trade RTD Coffee: % Volume 2021-2024

Table 139 NBO Company Shares of Off-trade RTD Coffee: % Value 2020-2024

Table 140 LBN Brand Shares of Off-trade RTD Coffee: % Value 2021-2024

Table 141 Forecast Off-trade Sales of RTD Coffee: Volume 2024-2029

Table 142 ☐Forecast Off-trade Sales of RTD Coffee: Value 2024-2029

Table 143  $\square$ Forecast Off-trade Sales of RTD Coffee: % Volume Growth 2024-2029

Table 144 [Forecast Off-trade Sales of RTD Coffee: % Value Growth 2024-2029

ASIAN SPECIALITY DRINKS IN JAPAN

#### KEY DATA FINDINGS

### 2024 DEVELOPMENTS

Asian speciality drinks begins a slow recovery amidst price sensitivity

Asahi leads with a dominant share

Vinegar drinks remain important with Asian speciality drinks

## PROSPECTS AND OPPORTUNITIES

Asian speciality drinks set to see negligible growth, but will have to compete with liquid concentrates

Asahi's Calpis faces challenges in expanding beyond young consumer base

Vinegar drinks may attract younger consumers for their beauty benefits

#### **CATEGORY DATA**

Table 145 Off-trade Sales of Asian Speciality Drinks: Volume 2019-2024

Table 146 Off-trade Sales of Asian Speciality Drinks: Value 2019-2024

Table 147 Off-trade Sales of Asian Speciality Drinks: % Volume Growth 2019-2024

Table 148 Off-trade Sales of Asian Speciality Drinks: % Value Growth 2019-2024

Table 149 NBO Company Shares of Off-trade Asian Speciality Drinks: % Volume 2020-2024

Table 150 LBN Brand Shares of Off-trade Asian Speciality Drinks: % Volume 2021-2024

Table 151 NBO Company Shares of Off-trade Asian Speciality Drinks: % Value 2020-2024

Table 152 LBN Brand Shares of Off-trade Asian Speciality Drinks: % Value 2021-2024

Table 153 Forecast Off-trade Sales of Asian Speciality Drinks: Volume 2024-2029

Table 154 [Forecast Off-trade Sales of Asian Speciality Drinks: Value 2024-2029

Table 155 ☐Forecast Off-trade Sales of Asian Speciality Drinks: % Volume Growth 2024-2029

Table 156 | Forecast Off-trade Sales of Asian Speciality Drinks: % Value Growth 2024-2029



☐ - Print this form

To place an Order with Scotts International:

# **Soft Drinks in Japan**

Market Direction | 2024-12-17 | 105 pages | Euromonitor

☐ - Complete the rele	vant blank fields and sign			
<ul> <li>Send as a scanned email to support@scotts-international.com</li> </ul>				
ORDER FORM:				
Select license	License			Price
	Single User Licence			€2150.00
	Multiple User License (1 Site)			€4300.00
	l ' · · · ·			€6450.00
			VAT	
			Total	
*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.				
** VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbe				
V/// Will be duded dt 2	370 for Folish bused companies, marvie	dudis una 20 basea com	parties with are allable to provide a	valia 20 vat ivambe
Email*		Phone*		
First Name*		Last Name*		
Job title*				
Company Name*		EU Vat / Tax ID / NIP number*		
Address*		City*	· · · · · · · · · · · · · · · · · · ·	
Zip Code*		Country*		
		Date	2025-05-04	
		Signature		
				1

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com www.scotts-international.com