

Carbonates in the Netherlands

November 2025

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KEY DATA FINDINGS

2025 DEVELOPMENTS

Increasingly targeting adults

INDUSTRY PERFORMANCE

Warm weather in spring and summer helps category to achieve growth

Growing interest in reduced sugar orange carbonates

WHAT'S NEXT?

Very modest growth expected

Producers develop new concepts to steal consumers from alcoholic drinks category

Reduced sugar variants will see further growth, but regular variants will compete

COMPETITIVE LANDSCAPE

Coca-Cola launches new flavour variants for its popular carbonates brands

Kumasi Drinks offers ethical consumption, no added sugar and novel flavour to adult consumers

CHANNELS

Supermarkets continue to develop their carbonates ranges

E-commerce expanding its presence in carbonates

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[Soft Drinks in the Netherlands - Industry Overview](#)

EXECUTIVE SUMMARY

Soft drinks seeing an upturn

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INDUSTRY PERFORMANCE

Weather conditions boost demand, but price rises constrain growth

Shift towards healthier products and marketing tie-ins

WHAT'S NEXT?

Manufacturers need to focus on value

Health and wellness to remain key

Red Bull challenging Coca-Cola for top spot

COMPETITIVE LANDSCAPE

Coca-Cola holds presence across soft drinks

Smaller local companies benefit from clean, modern design and transparency

CHANNELS

Supermarkets dominates distribution of soft drinks

Retail e-commerce proving popular amongst large, busy households

Foodservice vs retail split

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