



Soft Drinks in the US

December 2025

[Table of Contents](#)

Soft Drinks in the US

EXECUTIVE SUMMARY

Premiumisation and caution visible in soft drinks in the US

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Functional beverages witness rapid transformation

Affordability remains a key concern

Slower but significant new product development

WHAT'S NEXT?

Value sales to outpace volume sales in growth terms amid a focus on wellness trends

Players to invest in innovation and marketing to gain a competitive edge

Climatic imprint on soft drinks

COMPETITIVE LANDSCAPE

The leading player innovates and premiumises its offer to stay ahead

Poppi surges after PepsiCo acquisition

CHANNELS

Retail e-commerce gains but limitations remain in place

Strong on-trade channel for soft drinks

MARKET DATA

Table 1 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2020-2025

Table 2 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2020-2025

Table 3 - Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2020-2025

Table 4 - Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2020-2025

Table 5 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: Volume 2025

Table 6 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: % Volume 2025

Table 7 - Off-trade vs On-trade Sales of Soft Drinks by Category: Value 2025

Table 8 - Off-trade vs On-trade Sales of Soft Drinks by Category: % Value 2025

Table 9 - Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2020-2025

Table 10 - Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2020-2025

Table 11 - Off-trade Sales of Soft Drinks by Category: Value 2020-2025

Table 12 - Off-trade Sales of Soft Drinks by Category: % Value Growth 2020-2025

Table 13 - Sales of Soft Drinks by Total Fountain On-trade: Volume 2020-2025

Table 14 - Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2020-2025

Table 15 - NBO Company Shares of Total Soft Drinks (RTD): % Volume 2021-2025

Table 16 - LBN Brand Shares of Total Soft Drinks (RTD): % Volume 2022-2025

Table 17 - NBO Company Shares of On-trade Soft Drinks (RTD): % Volume 2021-2025

Table 18 - LBN Brand Shares of On-trade Soft Drinks (RTD): % Volume 2022-2025

Table 19 - NBO Company Shares of Off-trade Soft Drinks (RTD): % Volume 2021-2025

Table 20 - LBN Brand Shares of Off-trade Soft Drinks (RTD): % Volume 2022-2025

Table 21 - NBO Company Shares of Off-trade Soft Drinks: % Value 2021-2025

Table 22 - LBN Brand Shares of Off-trade Soft Drinks: % Value 2022-2025

Table 23 - Penetration of Private Label in Off-trade Soft Drinks (RTD) by Category: % Volume 2020-2025

Table 24 - Penetration of Private Label in Off-trade Soft Drinks by Category: % Value 2020-2025

Table 25 - Distribution of Off-trade Soft Drinks (as sold) by Format: % Volume 2020-2025

Table 26 - Distribution of Off-trade Soft Drinks (as sold) by Format and Category: % Volume 2025

Table 27 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2025-2030

Table 28 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2025-2030

Table 29 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2025-2030

Table 30 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2025-2030

Table 31 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2025-2030

Table 32 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2025-2030

Table 33 - Forecast Off-trade Sales of Soft Drinks by Category: Value 2025-2030

Table 34 - Forecast Off-trade Sales of Soft Drinks by Category: % Value Growth 2025-2030

Table 35 - Forecast Sales of Soft Drinks by Total Fountain On-trade: Volume 2025-2030

Table 36 - Forecast Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2025-2030

APPENDIX

Fountain sales in the US

COUNTRY REPORTS DISCLAIMER

SOURCES

Summary 1 - Research Sources

[Bottled Water in the US](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

On-trade channel pushes the category into positive total volume sales waters

INDUSTRY PERFORMANCE

Functional bottled water continues to develop as a category

Novelty, hydration, taste and healthier alternative energies spring from flavoured bottled water

WHAT'S NEXT?

Three pillars to success

Breakthroughs in formulae to spur functional beverages

GLP-1 adoption to gain momentum

COMPETITIVE LANDSCAPE

BlueTriton Brands offers a strong, diverse portfolio to lead the category

Mixed bag for The Coca-Cola Co in bottled water

CHANNELS

Commodity status of bottled water favours brick-and-mortar retailers

Shifts within e-commerce retailing of bottled water

CATEGORY DATA

Table 37 - Off-trade Sales of Bottled Water by Category: Volume 2020-2025

Table 38 - Off-trade Sales of Bottled Water by Category: Value 2020-2025

Table 39 - Off-trade Sales of Bottled Water by Category: % Volume Growth 2020-2025

Table 40 - Off-trade Sales of Bottled Water by Category: % Value Growth 2020-2025

Table 41 - NBO Company Shares of Off-trade Bottled Water: % Volume 2021-2025

Table 42 - LBN Brand Shares of Off-trade Bottled Water: % Volume 2022-2025

Table 43 - NBO Company Shares of Off-trade Bottled Water: % Value 2021-2025

Table 44 - LBN Brand Shares of Off-trade Bottled Water: % Value 2022-2025

Table 45 - Forecast Off-trade Sales of Bottled Water by Category: Volume 2025-2030

Table 46 - Forecast Off-trade Sales of Bottled Water by Category: Value 2025-2030

Table 47 - Forecast Off-trade Sales of Bottled Water by Category: % Volume Growth 2025-2030

Table 48 - Forecast Off-trade Sales of Bottled Water by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

Carbonates in the US

KEY DATA FINDINGS

2025 DEVELOPMENTS

Recovery opportunities appear in carbonates

INDUSTRY PERFORMANCE

Energy drinks presents a strong substitution option
Newer brands differentiate through wellness and product attributes

WHAT'S NEXT?

Investment is required to maintain the strength of carbonates within soft drinks
AI is a transformative force in carbonates
MAHA initiative to consolidate impact on carbonates in the forecast period

COMPETITIVE LANDSCAPE

The Coca-Cola Co leads as the competitive landscape develops and intensifies
Poppi and Olipop ride the functional wave

CHANNELS

Supermarkets retains leadership of distribution
Strong development within e-commerce widens origins of carbonates sales

CATEGORY DATA

- Table 49 - Off-trade vs On-trade Sales of Carbonates: Volume 2020-2025
- Table 50 - Off-trade vs On-trade Sales of Carbonates: Value 2020-2025
- Table 51 - Off-trade vs On-trade Sales of Carbonates: % Volume Growth 2020-2025
- Table 52 - Off-trade vs On-trade Sales of Carbonates: % Value Growth 2020-2025
- Table 53 - Off-trade Sales of Carbonates by Category: Volume 2020-2025
- Table 54 - Off-trade Sales of Carbonates by Category: Value 2020-2025
- Table 55 - Off-trade Sales of Carbonates by Category: % Volume Growth 2020-2025
- Table 56 - Off-trade Sales of Carbonates by Category: % Value Growth 2020-2025
- Table 57 - Total Sales of Carbonates by Fountain On-trade: Volume 2020-2025
- Table 58 - Total Sales of Carbonates by Fountain On-trade: % Volume Growth 2020-2025
- Table 59 - NBO Company Shares of Off-trade Carbonates: % Volume 2021-2025
- Table 60 - LBN Brand Shares of Off-trade Carbonates: % Volume 2022-2025
- Table 61 - NBO Company Shares of Off-trade Carbonates: % Value 2021-2025
- Table 62 - LBN Brand Shares of Off-trade Carbonates: % Value 2022-2025
- Table 63 - Forecast Off-trade Sales of Carbonates by Category: Volume 2025-2030
- Table 64 - Forecast Off-trade Sales of Carbonates by Category: Value 2025-2030
- Table 65 - Forecast Off-trade Sales of Carbonates by Category: % Volume Growth 2025-2030
- Table 66 - Forecast Off-trade Sales of Carbonates by Category: % Value Growth 2025-2030
- Table 67 - Forecast Total Sales of Carbonates by Fountain On-trade: Volume 2025-2030
- Table 68 - Forecast Total Sales of Carbonates by Fountain On-trade: % Volume Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

Concentrates in the US

KEY DATA FINDINGS

2025 DEVELOPMENTS

Concentrates adds dynamic development to economic advantage to post strong growth

INDUSTRY PERFORMANCE

Concentrates retains importance through wellness, convenience and cost aspects

Company activity to meet changing industry and consumer trends boosts powder concentrates

WHAT'S NEXT?

Greater variety to characterise concentrates

Reformulations to provide functionality without compromising on taste

GLP-1 to influence new product development and marketing

COMPETITIVE LANDSCAPE

Kraft Heinz remains a highly competitive leader in off-trade RTD volume terms

Unilever accelerates innovation to satisfy evolving consumer demands

CHANNELS

Physical supermarkets lead but omnichannel retailing gains traction

Concentrates fit with online retailing

Concentrates Conversions

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

CATEGORY DATA

Table 69 - Off-trade Sales of Concentrates (RTD) by Category: Volume 2020-2025

Table 70 - Off-trade Sales of Concentrates (RTD) by Category: % Volume Growth 2020-2025

Table 71 - Off-trade Sales of Concentrates by Category: Value 2020-2025

Table 72 - Off-trade Sales of Concentrates by Category: % Value Growth 2020-2025

Table 73 - LBN Brand Shares of Off-trade Concentrates (RTD): % Volume 2022-2025

Table 74 - NBO Company Shares of Off-trade Concentrates: % Value 2021-2025

Table 75 - LBN Brand Shares of Off-trade Concentrates: % Value 2022-2025

Table 76 - NBO Company Shares of Off-trade Liquid Concentrates (RTD): % Volume 2021-2025

Table 77 - LBN Brand Shares of Off-trade Liquid Concentrates (RTD): % Volume 2022-2025

Table 78 - NBO Company Shares of Off-trade Powder Concentrates (RTD): % Volume 2021-2025

Table 79 - LBN Brand Shares of Off-trade Powder Concentrates (RTD): % Volume 2022-2025

Table 80 - Forecast Off-trade Sales of Concentrates (RTD) by Category: Volume 2025-2030

Table 81 - Forecast Off-trade Sales of Concentrates (RTD) by Category: % Volume Growth 2025-2030

Table 82 - Forecast Off-trade Sales of Concentrates by Category: Value 2025-2030

Table 83 - Forecast Off-trade Sales of Concentrates by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

[Juice in the US](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

An unhealthy image, legislation and production issues beset juice

INDUSTRY PERFORMANCE

General downturn in juice consumption

Coconut and other plant waters adds dynamism to juice in the US

WHAT'S NEXT?

Juice to see an ongoing decline in off-trade consumption

AI to effect the whole lifecycle of juice in the US

Legislation and production challenges to dampen juice's prospects

COMPETITIVE LANDSCAPE

The Coca-Cola Co shows resilience in an ailing category
Vita Coco rides wave of coconut and other plant waters to maintain a fast growth trajectory

CHANNELS

Strong infrastructure enables supermarkets to lead the distribution of juice
Omnichannel retailers push e-commerce

CATEGORY DATA

Table 84 - Off-trade Sales of Juice by Category: Volume 2020-2025
Table 85 - Off-trade Sales of Juice by Category: Value 2020-2025
Table 86 - Off-trade Sales of Juice by Category: % Volume Growth 2020-2025
Table 87 - Off-trade Sales of Juice by Category: % Value Growth 2020-2025
Table 88 - NBO Company Shares of Off-trade Juice: % Volume 2021-2025
Table 89 - LBN Brand Shares of Off-trade Juice: % Volume 2022-2025
Table 90 - NBO Company Shares of Off-trade Juice: % Value 2021-2025
Table 91 - LBN Brand Shares of Off-trade Juice: % Value 2022-2025
Table 92 - Forecast Off-trade Sales of Juice by Category: Volume 2025-2030
Table 93 - Forecast Off-trade Sales of Juice by Category: Value 2025-2030
Table 94 - Forecast Off-trade Sales of Juice by Category: % Volume Growth 2025-2030
Table 95 - Forecast Off-trade Sales of Juice by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

[RTD Coffee in the US](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

RTD coffee faces challenges amid key beverage trends

INDUSTRY PERFORMANCE

Diverse offer and presence of RTD coffee in beverages
Cold brew offers growth opportunities

WHAT'S NEXT?

New profiles to improve positioning
Beanless and other innovative formulations can add dynamism
Serious risk of disruption for RTD coffee

COMPETITIVE LANDSCAPE

The leading player tries to respond to challenges
La Colombe continues to gain retail space for a wider and more dynamic offer

CHANNELS

Convenience plays a key role in the choice of distribution channel
Omnichannel strategy drives e-commerce in RTD coffee

CATEGORY DATA

Table 96 - Off-trade Sales of RTD Coffee: Volume 2020-2025
Table 97 - Off-trade Sales of RTD Coffee: Value 2020-2025
Table 98 - Off-trade Sales of RTD Coffee: % Volume Growth 2020-2025
Table 99 - Off-trade Sales of RTD Coffee: % Value Growth 2020-2025
Table 100 - NBO Company Shares of Off-trade RTD Coffee: % Volume 2021-2025

Table 101 - LBN Brand Shares of Off-trade RTD Coffee: % Volume 2022-2025

Table 102 - NBO Company Shares of Off-trade RTD Coffee: % Value 2021-2025

Table 103 - LBN Brand Shares of Off-trade RTD Coffee: % Value 2022-2025

Table 104 - Forecast Off-trade Sales of RTD Coffee: Volume 2025-2030

Table 105 - Forecast Off-trade Sales of RTD Coffee: Value 2025-2030

Table 106 - Forecast Off-trade Sales of RTD Coffee: % Volume Growth 2025-2030

Table 107 - Forecast Off-trade Sales of RTD Coffee: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

RTD Tea in the US

KEY DATA FINDINGS

2025 DEVELOPMENTS

Regular still RTD tea pulls down overall category performance

INDUSTRY PERFORMANCE

Reduced sugar still RTD tea continues to gain momentum and has yet to reach its full potential

Kombucha offers growth opportunities amidst the wellness trend

WHAT'S NEXT?

Onus on healthier options to develop RTD tea

AI to play a dynamic role

US-Argentina relations cool commodity concerns

COMPETITIVE LANDSCAPE

New course for Lipton offers growth opportunities

Milo's enjoys investment to climb the rankings

CHANNELS

Impulse and away-from-home consumption occasions favour convenience retailers in RTD tea

Online and omnichannel competition to convenience retailers intensifies

CATEGORY DATA

Table 108 - Off-trade Sales of RTD Tea by Category: Volume 2020-2025

Table 109 - Off-trade Sales of RTD Tea by Category: Value 2020-2025

Table 110 - Off-trade Sales of RTD Tea by Category: % Volume Growth 2020-2025

Table 111 - Off-trade Sales of RTD Tea by Category: % Value Growth 2020-2025

Table 112 - Leading Flavours for Off-trade RTD Tea: % Volume 2020-2025

Table 113 - NBO Company Shares of Off-trade RTD Tea: % Volume 2021-2025

Table 114 - LBN Brand Shares of Off-trade RTD Tea: % Volume 2022-2025

Table 115 - NBO Company Shares of Off-trade RTD Tea: % Value 2021-2025

Table 116 - LBN Brand Shares of Off-trade RTD Tea: % Value 2022-2025

Table 117 - Forecast Off-trade Sales of RTD Tea by Category: Volume 2025-2030

Table 118 - Forecast Off-trade Sales of RTD Tea by Category: Value 2025-2030

Table 119 - Forecast Off-trade Sales of RTD Tea by Category: % Volume Growth 2025-2030

Table 120 - Forecast Off-trade Sales of RTD Tea by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

Energy Drinks in the US

KEY DATA FINDINGS

2025 DEVELOPMENTS

Energy drinks enjoys surging appeal

INDUSTRY PERFORMANCE

Dynamic year of development and growth for energy drinks

Consumers look to energy drinks as performance enhancer and cognitive support beverages

WHAT'S NEXT?

Strong growth opportunities remain amidst challenges

“Clean caffeine” to redefine energy drinks

Energy drinks faces stricter regulation

COMPETITIVE LANDSCAPE

Monster Beverage invests in the category to maintain the leading position

Major acquisition activity disrupts energy drinks in the US

CHANNELS

Convenience retailers deliver on demand needs

Retail e-commerce continues to gain ground in a young consumer-focused category

CATEGORY DATA

Table 121 - Off-trade Sales of Energy Drinks: Volume 2020-2025

Table 122 - Off-trade Sales of Energy Drinks: Value 2020-2025

Table 123 - Off-trade Sales of Energy Drinks: % Volume Growth 2020-2025

Table 124 - Off-trade Sales of Energy Drinks: % Value Growth 2020-2025

Table 125 - NBO Company Shares of Off-trade Energy Drinks: % Volume 2021-2025

Table 126 - LBN Brand Shares of Off-trade Energy Drinks: % Volume 2022-2025

Table 127 - NBO Company Shares of Off-trade Energy Drinks: % Value 2021-2025

Table 128 - LBN Brand Shares of Off-trade Energy Drinks: % Value 2022-2025

Table 129 - Forecast Off-trade Sales of Energy Drinks: Volume 2025-2030

Table 130 - Forecast Off-trade Sales of Energy Drinks: Value 2025-2030

Table 131 - Forecast Off-trade Sales of Energy Drinks: % Volume Growth 2025-2030

Table 132 - Forecast Off-trade Sales of Energy Drinks: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

[Sports Drinks in the US](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Expansion around hydration and the reduced sugar trend hamper sports drinks' performance

INDUSTRY PERFORMANCE

Sports drinks continues to shape shift in 2025

Young generations present a potentially strong consumer base for reduced sugar sports drinks

WHAT'S NEXT?

Sports drinks set to struggle as other soft drinks types encroach on its spaces

AI to foster new product development, manufacturing, consumer engagement and personalisation

MAHA initiative to shape sports drinks

COMPETITIVE LANDSCAPE

Gatorade sees growing competition from outside sports drinks

Rise and fall of a potential key new brand

CHANNELS

Large modern grocery retailers leverage wide offer and presence to lead distribution

Prime's struggles hinder e-commerce's potential expansion in sports drinks

CATEGORY DATA

Table 133 - Off-trade Sales of Sports Drinks: Volume 2020-2025

Table 134 - Off-trade Sales of Sports Drinks: Value 2020-2025

Table 135 - Off-trade Sales of Sports Drinks: % Volume Growth 2020-2025

Table 136 - Off-trade Sales of Sports Drinks: % Value Growth 2020-2025

Table 137 - NBO Company Shares of Off-trade Sports Drinks: % Volume 2021-2025

Table 138 - LBN Brand Shares of Off-trade Sports Drinks: % Volume 2022-2025

Table 139 - NBO Company Shares of Off-trade Sports Drinks: % Value 2021-2025

Table 140 - LBN Brand Shares of Off-trade Sports Drinks: % Value 2022-2025

Table 141 - Forecast Off-trade Sales of Sports Drinks: Volume 2025-2030

Table 142 - Forecast Off-trade Sales of Sports Drinks: Value 2025-2030

Table 143 - Forecast Off-trade Sales of Sports Drinks: % Volume Growth 2025-2030

Table 144 - Forecast Off-trade Sales of Sports Drinks: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

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/soft-drinks-in-the-us/report.