

# 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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## Soft Drinks in Japan - Industry Overview

### EXECUTIVE SUMMARY

Rising prices put pressure on volume sales in 2025

### KEY DATA FINDINGS

## 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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