

Soft Drinks in Sweden

December 2023

Table of Contents

EXECUTIVE SUMMARY

Soft drinks in 2023: The big picture

2023 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 2018-2023

Table 2 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2018-2023

Table 3 - Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2018-2023

Table 4 - Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2018-2023

Table 5 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: Volume 2022

Table 6 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: % Volume 2022

Table 7 - Off-trade vs On-trade Sales of Soft Drinks by Category: Value 2022

Table 8 - Off-trade vs On-trade Sales of Soft Drinks by Category: % Value 2022

Table 9 - Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2018-2023

Table 10 - Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2018-2023

Table 11 - Off-trade Sales of Soft Drinks by Category: Value 2018-2023

Table 12 - Off-trade Sales of Soft Drinks by Category: % Value Growth 2018-2023

Table 13 - Sales of Soft Drinks by Total Fountain On-trade: Volume 2018-2023

Table 14 - Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2018-2023

Table 15 - NBO Company Shares of Total Soft Drinks (RTD): % Volume 2019-2023

Table 16 - LBN Brand Shares of Total Soft Drinks (RTD): % Volume 2020-2023

Table 17 - NBO Company Shares of On-trade Soft Drinks (RTD): % Volume 2019-2023

Table 18 - LBN Brand Shares of On-trade Soft Drinks (RTD): % Volume 2020-2023

Table 19 - NBO Company Shares of Off-trade Soft Drinks (RTD): % Volume 2019-2023

Table 20 - LBN Brand Shares of Off-trade Soft Drinks (RTD): % Volume 2020-2023

Table 21 - NBO Company Shares of Off-trade Soft Drinks: % Value 2019-2023

Table 22 - LBN Brand Shares of Off-trade Soft Drinks: % Value 2020-2023

Table 23 - Penetration of Private Label in Off-trade Soft Drinks (RTD) by Category: % Volume 2018-2023

Table 24 - Penetration of Private Label in Off-trade Soft Drinks by Category: % Value 2018-2023

Table 25 - Distribution of Off-trade Soft Drinks (as sold) by Format: % Volume 2018-2023

Table 26 - Distribution of Off-trade Soft Drinks (as sold) by Format and Category: % Volume 2023

Table 27 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2023-2028

Table 28 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2023-2028

Table 29 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2023-2028

Table 30 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2023-2028

Table 31 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2023-2028

Table 32 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2023-2028

Table 33 - Forecast Off-trade Sales of Soft Drinks by Category: Value 2023-2028

Table 34 - Forecast Off-trade Sales of Soft Drinks by Category: % Value Growth 2023-2028

Table 35 - Forecast Sales of Soft Drinks by Total Fountain On-trade: Volume 2023-2028

Table 36 - Forecast Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2023-2028

APPENDIX

Fountain sales in Sweden

DISCLAIMER

SOURCES

Bottled Water in Sweden

KEY DATA FINDINGS

2023 DEVELOPMENTS

Off-trade volume performances vary according to category

Increasing brand and private label pressure on Loka

Sustainability provides push-pull factors for bottled water

PROSPECTS AND OPPORTUNITIES

Company activity and healthier perception to boost functional and flavoured products

Sustainability to continue to gain leverage

Single-portion and premium products to boost on-trade consumption

CATEGORY DATA

Table 37 - Off-trade Sales of Bottled Water by Category: Volume 2018-2023

Table 38 - Off-trade Sales of Bottled Water by Category: Value 2018-2023

Table 39 - Off-trade Sales of Bottled Water by Category: % Volume Growth 2018-2023

Table 40 - Off-trade Sales of Bottled Water by Category: % Value Growth 2018-2023

Table 41 - NBO Company Shares of Off-trade Bottled Water: % Volume 2019-2023

Table 42 - LBN Brand Shares of Off-trade Bottled Water: % Volume 2020-2023

Table 43 - NBO Company Shares of Off-trade Bottled Water: % Value 2019-2023

Table 44 - LBN Brand Shares of Off-trade Bottled Water: % Value 2020-2023

Table 45 - Forecast Off-trade Sales of Bottled Water by Category: Volume 2023-2028

Table 46 - Forecast Off-trade Sales of Bottled Water by Category: Value 2023-2028

Table 47 - Forecast Off-trade Sales of Bottled Water by Category: % Volume Growth 2023-2028

Table 48 - Forecast Off-trade Sales of Bottled Water by Category: % Value Growth 2023-2028

Carbonates in Sweden

KEY DATA FINDINGS

2023 DEVELOPMENTS

Reduced sugar carbonates drives volume growth in the off- and on-trade channels

Manufacturers focus on reduced sugar portfolios

Private label gains in an uncertain economic climate

PROSPECTS AND OPPORTUNITIES

Sugar and calorie concerns to shape the category

Private label and premium craft products offer growth potential

Sustainability to form strategic focus

CATEGORY DATA

Table 49 - Off-trade vs On-trade Sales of Carbonates: Volume 2018-2023

Table 50 - Off-trade vs On-trade Sales of Carbonates: Value 2018-2023

Table 51 - Off-trade vs On-trade Sales of Carbonates: % Volume Growth 2018-2023

Table 52 - Off-trade vs On-trade Sales of Carbonates: % Value Growth 2018-2023

Table 53 - Off-trade Sales of Carbonates by Category: Volume 2018-2023

Table 54 - Off-trade Sales of Carbonates by Category: Value 2018-2023

Table 55 - Off-trade Sales of Carbonates by Category: % Volume Growth 2018-2023

Table 56 - Off-trade Sales of Carbonates by Category: % Value Growth 2018-2023

Table 57 - Total Sales of Carbonates by Fountain On-trade: Volume 2018-2023

Table 58 - Total Sales of Carbonates by Fountain On-trade: % Volume Growth 2018-2023

Table 59 - NBO Company Shares of Off-trade Carbonates: % Volume 2019-2023

Table 60 - LBN Brand Shares of Off-trade Carbonates: % Volume 2020-2023

Table 61 - NBO Company Shares of Off-trade Carbonates: % Value 2019-2023

Table 62 - LBN Brand Shares of Off-trade Carbonates: % Value 2020-2023

Table 63 - Forecast Off-trade Sales of Carbonates by Category: Volume 2023-2028

Table 64 - Forecast Off-trade Sales of Carbonates by Category: Value 2023-2028

Table 65 - Forecast Off-trade Sales of Carbonates by Category: % Volume Growth 2023-2028

Table 66 - Forecast Off-trade Sales of Carbonates by Category: % Value Growth 2023-2028

Table 67 - Forecast Total Sales of Carbonates by Fountain On-trade: Volume 2023-2028

Table 68 - Forecast Total Sales of Carbonates by Fountain On-trade: % Volume Growth 2023-2028

Concentrates in Sweden

KEY DATA FINDINGS

2023 DEVELOPMENTS

Downward trajectory in demand continues in liquid concentrates

Private label wins over price-sensitive consumers

Consumers losing interest in powder concentrates

PROSPECTS AND OPPORTUNITIES

Sports-orientated powder concentrates may offer some respite from ongoing decline

Consumers and manufacturers to pay more attention to sustainability

Reduced sugar offer to gain importance

CATEGORY DATA

Concentrates Conversions

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

Table 69 - Off-trade Sales of Concentrates (RTD) by Category: Volume 2018-2023

Table 70 - Off-trade Sales of Concentrates (RTD) by Category: % Volume Growth 2018-2023

Table 71 - Off-trade Sales of Concentrates by Category: Value 2018-2023

Table 72 - Off-trade Sales of Concentrates by Category: % Value Growth 2018-2023

Table 73 - LBN Brand Shares of Off-trade Concentrates (RTD): % Volume 2020-2023

Table 74 - NBO Company Shares of Off-trade Concentrates: % Value 2019-2023

Table 75 - LBN Brand Shares of Off-trade Concentrates: % Value 2020-2023

Table 76 - NBO Company Shares of Off-trade Liquid Concentrates (RTD): % Volume 2019-2023

Table 77 - LBN Brand Shares of Off-trade Liquid Concentrates (RTD): % Volume 2020-2023

Table 78 - NBO Company Shares of Off-trade Powder Concentrates (RTD): % Volume 2019-2023

Table 79 - LBN Brand Shares of Off-trade Powder Concentrates (RTD): % Volume 2020-2023

Table 80 - Forecast Off-trade Sales of Concentrates (RTD) by Category: Volume 2023-2028

Table 81 - Forecast Off-trade Sales of Concentrates (RTD) by Category: % Volume Growth 2023-2028

Table 82 - Forecast Off-trade Sales of Concentrates by Category: Value 2023-2028

Table 83 - Forecast Off-trade Sales of Concentrates by Category: % Value Growth 2023-2028

Juice in Sweden

KEY DATA FINDINGS

2023 DEVELOPMENTS

Divergent demand trends but overall off-trade volume decline for juice

Proviva and Brava jockey for the leading position

Foodservice continues to make gains as consumers resume pre-pandemic lifestyles

PROSPECTS AND OPPORTUNITIES

Juice to continue shifts to perceived healthier juice products and the on-trade channel
Sustainability to shape offer
Small portion healthy options to provide juice with a shot in the arm

CATEGORY DATA

Table 84 - Off-trade Sales of Juice by Category: Volume 2018-2023
Table 85 - Off-trade Sales of Juice by Category: Value 2018-2023
Table 86 - Off-trade Sales of Juice by Category: % Volume Growth 2018-2023
Table 87 - Off-trade Sales of Juice by Category: % Value Growth 2018-2023
Table 88 - NBO Company Shares of Off-trade Juice: % Volume 2019-2023
Table 89 - LBN Brand Shares of Off-trade Juice: % Volume 2020-2023
Table 90 - NBO Company Shares of Off-trade Juice: % Value 2019-2023
Table 91 - LBN Brand Shares of Off-trade Juice: % Value 2020-2023
Table 92 - Forecast Off-trade Sales of Juice by Category: Volume 2023-2028
Table 93 - Forecast Off-trade Sales of Juice by Category: Value 2023-2028
Table 94 - Forecast Off-trade Sales of Juice by Category: % Volume Growth 2023-2028
Table 95 - Forecast Off-trade Sales of Juice by Category: % Value Growth 2023-2028

RTD Coffee in Sweden

KEY DATA FINDINGS

2023 DEVELOPMENTS

Rising availability stimulates interest and fast demand growth
RTD coffee sees moves towards healthier offer
Increasing pressure on the leading Starbucks brand

PROSPECTS AND OPPORTUNITIES

Fast growth projected for RTD coffee in the retail and foodservice channels
New entrants to continue to add vibrancy to a young category
Private label may emerge more strongly through improved offerings and local products

CATEGORY DATA

Table 96 - Off-trade Sales of RTD Coffee: Volume 2018-2023
Table 97 - Off-trade Sales of RTD Coffee: Value 2018-2023
Table 98 - Off-trade Sales of RTD Coffee: % Volume Growth 2018-2023
Table 99 - Off-trade Sales of RTD Coffee: % Value Growth 2018-2023
Table 100 - NBO Company Shares of Off-trade RTD Coffee: % Volume 2019-2023
Table 101 - LBN Brand Shares of Off-trade RTD Coffee: % Volume 2020-2023
Table 102 - NBO Company Shares of Off-trade RTD Coffee: % Value 2019-2023
Table 103 - LBN Brand Shares of Off-trade RTD Coffee: % Value 2020-2023
Table 104 - Forecast Off-trade Sales of RTD Coffee: Volume 2023-2028
Table 105 - Forecast Off-trade Sales of RTD Coffee: Value 2023-2028
Table 106 - Forecast Off-trade Sales of RTD Coffee: % Volume Growth 2023-2028
Table 107 - Forecast Off-trade Sales of RTD Coffee: % Value Growth 2023-2028

RTD Tea in Sweden

KEY DATA FINDINGS

2023 DEVELOPMENTS

Level of maturity hampers regular still RTD tea
Health and wellness trend continues to drive kombucha appeal

Pfanner Ice Tea's offer creates volume and value sales opportunities

PROSPECTS AND OPPORTUNITIES

Shift from regular to reduced sugar and kombucha products

Growing offer and local presence to boost reduced sugar still RTD tea and kombucha, respectively

Private label to retain its appeal

CATEGORY DATA

Table 108 - Off-trade Sales of RTD Tea by Category: Volume 2018-2023

Table 109 - Off-trade Sales of RTD Tea by Category: Value 2018-2023

Table 110 - Off-trade Sales of RTD Tea by Category: % Volume Growth 2018-2023

Table 111 - Off-trade Sales of RTD Tea by Category: % Value Growth 2018-2023

Table 112 - Leading Flavours for Off-trade RTD Tea: % Volume 2018-2023

Table 113 - NBO Company Shares of Off-trade RTD Tea: % Volume 2019-2023

Table 114 - LBN Brand Shares of Off-trade RTD Tea: % Volume 2020-2023

Table 115 - NBO Company Shares of Off-trade RTD Tea: % Value 2019-2023

Table 116 - LBN Brand Shares of Off-trade RTD Tea: % Value 2020-2023

Table 117 - Forecast Off-trade Sales of RTD Tea by Category: Volume 2023-2028

Table 118 - Forecast Off-trade Sales of RTD Tea by Category: Value 2023-2028

Table 119 - Forecast Off-trade Sales of RTD Tea by Category: % Volume Growth 2023-2028

Table 120 - Forecast Off-trade Sales of RTD Tea by Category: % Value Growth 2023-2028

Energy Drinks in Sweden

KEY DATA FINDINGS

2023 DEVELOPMENTS

Regular energy drinks continues to rebound from COVID-19 slump

Reduced sugar energy drinks leverage healthier perception and higher investment to lead

Private label continues to develop and grow in energy drinks

PROSPECTS AND OPPORTUNITIES

Reduced sugar to continue to shape and drive energy drinks

Possible regulations on energy drinks cast a shadow

Retail is set to remain the main distribution arena

CATEGORY DATA

Table 121 - Off-trade Sales of Energy Drinks: Volume 2018-2023

Table 122 - Off-trade Sales of Energy Drinks: Value 2018-2023

Table 123 - Off-trade Sales of Energy Drinks: % Volume Growth 2018-2023

Table 124 - Off-trade Sales of Energy Drinks: % Value Growth 2018-2023

Table 125 - NBO Company Shares of Off-trade Energy Drinks: % Volume 2019-2023

Table 126 - LBN Brand Shares of Off-trade Energy Drinks: % Volume 2020-2023

Table 127 - NBO Company Shares of Off-trade Energy Drinks: % Value 2019-2023

Table 128 - LBN Brand Shares of Off-trade Energy Drinks: % Value 2020-2023

Table 129 - Forecast Off-trade Sales of Energy Drinks: Volume 2023-2028

Table 130 - Forecast Off-trade Sales of Energy Drinks: Value 2023-2028

Table 131 - Forecast Off-trade Sales of Energy Drinks: % Volume Growth 2023-2028

Table 132 - Forecast Off-trade Sales of Energy Drinks: % Value Growth 2023-2028

Sports Drinks in Sweden

KEY DATA FINDINGS

2023 DEVELOPMENTS

Low investment hampers category development
Array of alternatives threaten sports drinks
Gatorade starts to challenge Powerade's dominance

PROSPECTS AND OPPORTUNITIES

Sports drinks to continue to struggle in the forecast period
Alternatives may cannibalise sports drinks consumption occasions
Niche and mainstream products to offer some growth potential for sports drinks

CATEGORY DATA

Table 133 - Off-trade Sales of Sports Drinks: Volume 2018-2023
Table 134 - Off-trade Sales of Sports Drinks: Value 2018-2023
Table 135 - Off-trade Sales of Sports Drinks: % Volume Growth 2018-2023
Table 136 - Off-trade Sales of Sports Drinks: % Value Growth 2018-2023
Table 137 - NBO Company Shares of Off-trade Sports Drinks: % Volume 2019-2023
Table 138 - LBN Brand Shares of Off-trade Sports Drinks: % Volume 2020-2023
Table 139 - NBO Company Shares of Off-trade Sports Drinks: % Value 2019-2023
Table 140 - LBN Brand Shares of Off-trade Sports Drinks: % Value 2020-2023
Table 141 - Forecast Off-trade Sales of Sports Drinks: Volume 2023-2028
Table 142 - Forecast Off-trade Sales of Sports Drinks: Value 2023-2028
Table 143 - Forecast Off-trade Sales of Sports Drinks: % Volume Growth 2023-2028
Table 144 - Forecast Off-trade Sales of Sports Drinks: % Value Growth 2023-2028

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-sweden/report.