Euromonitor International

Soft Drinks in the US

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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

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Retail e-commerce gains but limitations remain in place
Strong on-trade channel for soft drinks

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INDUSTRY PERFORMANCE

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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
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2025 DEVELOPMENTS

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INDUSTRY PERFORMANCE

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

WHAT'S NEXT?

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AI is a transformative force in carbonates
MAHA initiative to consolidate impact on carbonates in the forecast period

COMPETITIVE LANDSCAPE

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2025 DEVELOPMENTS

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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
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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
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RTD Coffee in the US

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2025 DEVELOPMENTS

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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
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RTD Tea in the US

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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
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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
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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
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