

# Soft Drinks in Belgium

November 2023

**Table of Contents** 

## Soft Drinks in Belgium

#### **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 Off-trade Soft Drinks (RTD): % Volume 2019-2023
- Table 16 LBN Brand Shares of Off-trade Soft Drinks (RTD): % Volume 2020-2023
- Table 17 NBO Company Shares of Off-trade Soft Drinks: % Value 2019-2023
- Table 18 LBN Brand Shares of Off-trade Soft Drinks: % Value 2020-2023
- Table 19 Penetration of Private Label in Off-trade Soft Drinks (RTD) by Category: % Volume 2018-2023
- Table 20 Penetration of Private Label in Off-trade Soft Drinks by Category: % Value 2018-2023
- Table 21 Distribution of Off-trade Soft Drinks (as sold) by Format: % Volume 2018-2023
- Table 22 Distribution of Off-trade Soft Drinks (as sold) by Format and Category: % Volume 2023
- Table 23 Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2023-2028
- Table 24 Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2023-2028
- Table 25 Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2023-2028
- Table 26 Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2023-2028
- Table 27 Forecast Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2023-2028
- Table 28 Forecast Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2023-2028
- Table 29 Forecast Off-trade Sales of Soft Drinks by Category: Value 2023-2028
- Table 30 Forecast Off-trade Sales of Soft Drinks by Category: % Value Growth 2023-2028
- Table 31 Forecast Sales of Soft Drinks by Total Fountain On-trade: Volume 2023-2028
- Table 32 Forecast Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2023-2028

## **APPENDIX**

Fountain sales in Belgium

#### **DISCLAIMER**

# **SOURCES**

Summary 1 - Research Sources

Bottled Water in Belgium

#### **KEY DATA FINDINGS**

#### 2023 DEVELOPMENTS

Unfavourable weather conditions and cross-border trade negatively affect domestic demand for bottled water in 2023

Pressure from plastic reduction initiatives

Rise of functional water, pressure on flavoured water

#### PROSPECTS AND OPPORTUNITIES

Foreseen stability in bottled water consumption

Continued advancements in functional bottled water

Emphasis on enhanced sustainable packaging

#### **CATEGORY DATA**

Table 33 - Off-trade Sales of Bottled Water by Category: Volume 2018-2023

Table 34 - Off-trade Sales of Bottled Water by Category: Value 2018-2023

Table 35 - Off-trade Sales of Bottled Water by Category: % Volume Growth 2018-2023

Table 36 - Off-trade Sales of Bottled Water by Category: % Value Growth 2018-2023

Table 37 - NBO Company Shares of Off-trade Bottled Water: % Volume 2019-2023

Table 38 - LBN Brand Shares of Off-trade Bottled Water: % Volume 2020-2023

Table 39 - NBO Company Shares of Off-trade Bottled Water: % Value 2019-2023

Table 40 - LBN Brand Shares of Off-trade Bottled Water: % Value 2020-2023

Table 41 - Forecast Off-trade Sales of Bottled Water by Category: Volume 2023-2028

Table 42 - Forecast Off-trade Sales of Bottled Water by Category: Value 2023-2028

Table 43 - Forecast Off-trade Sales of Bottled Water by Category: % Volume Growth 2023-2028

Table 44 - Forecast Off-trade Sales of Bottled Water by Category: % Value Growth 2023-2028

# Carbonates in Belgium

# KEY DATA FINDINGS

# 2023 DEVELOPMENTS

Declining carbonates market in Belgium

Limited innovation in 2023

Embracing sustainable packaging

# PROSPECTS AND OPPORTUNITIES

Sustained decline in carbonates

Divergence between carbonates for adults and children

Functional drinks in carbonates

# CATEGORY DATA

Table 45 - Off-trade vs On-trade Sales of Carbonates: Volume 2018-2023

Table 46 - Off-trade vs On-trade Sales of Carbonates: Value 2018-2023

Table 47 - Off-trade vs On-trade Sales of Carbonates: % Volume Growth 2018-2023

Table 48 - Off-trade vs On-trade Sales of Carbonates: % Value Growth 2018-2023

Table 49 - Off-trade Sales of Carbonates by Category: Volume 2018-2023

Table 50 - Off-trade Sales of Carbonates by Category: Value 2018-2023

Table 51 - Off-trade Sales of Carbonates by Category: % Volume Growth 2018-2023

Table 52 - Off-trade Sales of Carbonates by Category: % Value Growth 2018-2023

Table 53 - Total Sales of Carbonates by Fountain On-trade: Volume 2018-2023

Table 54 - Total Sales of Carbonates by Fountain On-trade: % Volume Growth 2018-2023

Table 55 - NBO Company Shares of Off-trade Carbonates: % Volume 2019-2023

Table 56 - LBN Brand Shares of Off-trade Carbonates: % Volume 2020-2023

Table 57 - NBO Company Shares of Off-trade Carbonates: % Value 2019-2023

- Table 58 LBN Brand Shares of Off-trade Carbonates: % Value 2020-2023
- Table 59 Forecast Off-trade Sales of Carbonates by Category: Volume 2023-2028
- Table 60 Forecast Off-trade Sales of Carbonates by Category: Value 2023-2028
- Table 61 Forecast Off-trade Sales of Carbonates by Category: % Volume Growth 2023-2028
- Table 62 Forecast Off-trade Sales of Carbonates by Category: % Value Growth 2023-2028
- Table 63 Forecast Total Sales of Carbonates by Fountain On-trade: Volume 2023-2028
- Table 64 Forecast Total Sales of Carbonates by Fountain On-trade: % Volume Growth 2023-2028

# Concentrates in Belgium

#### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Decline of concentrates in response to health trend Rise in popularity of home carbonizer solutions Concentrates benefit from anti-plastic sentiment

# PROSPECTS AND OPPORTUNITIES

Growth potential for concentrates in the forecast period
Rise in popularity of soda machines and sustainable alternatives
Functional liquid concentrates as a growth catalyst

# **CATEGORY DATA**

#### **Concentrates Conversions**

- Summary 2 Concentrates Conversion Factors for Ready-to-Drink (RTD) Format
- Table 65 Off-trade Sales of Concentrates (RTD) by Category: Volume 2018-2023
- Table 66 Off-trade Sales of Concentrates (RTD) by Category: % Volume Growth 2018-2023
- Table 67 Off-trade Sales of Concentrates by Category: Value 2018-2023
- Table 68 Off-trade Sales of Concentrates by Category: % Value Growth 2018-2023
- Table 69 LBN Brand Shares of Off-trade Concentrates (RTD): % Volume 2020-2023
- Table 70 NBO Company Shares of Off-trade Concentrates: % Value 2019-2023
- Table 71 LBN Brand Shares of Off-trade Concentrates: % Value 2020-2023
- Table 72 NBO Company Shares of Off-trade Liquid Concentrates (RTD): % Volume 2019-2023
- Table 73 LBN Brand Shares of Off-trade Liquid Concentrates (RTD): % Volume 2020-2023
- Table 74 NBO Company Shares of Off-trade Powder Concentrates (RTD): % Volume 2019-2023
- Table 75 LBN Brand Shares of Off-trade Powder Concentrates (RTD): % Volume 2020-2023
- Table 76 Forecast Off-trade Sales of Concentrates (RTD) by Category: Volume 2023-2028
- Table 77 Forecast Off-trade Sales of Concentrates (RTD) by Category: % Volume Growth 2023-2028
- Table 78 Forecast Off-trade Sales of Concentrates by Category: Value 2023-2028
- Table 79 Forecast Off-trade Sales of Concentrates by Category: % Value Growth 2023-2028

# Juice in Belgium

# **KEY DATA FINDINGS**

# 2023 DEVELOPMENTS

Continued decline in juice in 2023
Resilience of functional juices
Expansion of private label

# PROSPECTS AND OPPORTUNITIES

Continued decline projected
Shift towards reduced sugar juice drinks
Continued relevance of functional fruit juice

#### **CATEGORY DATA**

- Table 80 Off-trade Sales of Juice by Category: Volume 2018-2023
- Table 81 Off-trade Sales of Juice by Category: Value 2018-2023
- Table 82 Off-trade Sales of Juice by Category: % Volume Growth 2018-2023
- Table 83 Off-trade Sales of Juice by Category: % Value Growth 2018-2023
- Table 84 NBO Company Shares of Off-trade Juice: % Volume 2019-2023
- Table 85 LBN Brand Shares of Off-trade Juice: % Volume 2020-2023
- Table 86 NBO Company Shares of Off-trade Juice: % Value 2019-2023
- Table 87 LBN Brand Shares of Off-trade Juice: % Value 2020-2023
- Table 88 Forecast Off-trade Sales of Juice by Category: Volume 2023-2028
- Table 89 Forecast Off-trade Sales of Juice by Category: Value 2023-2028
- Table 90 Forecast Off-trade Sales of Juice by Category: % Volume Growth 2023-2028
- Table 91 Forecast Off-trade Sales of Juice by Category: % Value Growth 2023-2028

# RTD Coffee in Belgium

## **KEY DATA FINDINGS**

#### 2023 DEVELOPMENTS

Consistent growth and functionality

Focus on packaging innovation

Private label dominates

# PROSPECTS AND OPPORTUNITIES

Continued growth drivers

Impact of foodservice on retail growth

Transition from plastic cups

#### **CATEGORY DATA**

- Table 92 Off-trade Sales of RTD Coffee: Volume 2018-2023
- Table 93 Off-trade Sales of RTD Coffee: Value 2018-2023
- Table 94 Off-trade Sales of RTD Coffee: % Volume Growth 2018-2023
- Table 95 Off-trade Sales of RTD Coffee: % Value Growth 2018-2023
- Table 96 NBO Company Shares of Off-trade RTD Coffee: % Volume 2019-2023
- Table 97 LBN Brand Shares of Off-trade RTD Coffee: % Volume 2020-2023
- Table 98 NBO Company Shares of Off-trade RTD Coffee: % Value 2019-2023
- Table 99 LBN Brand Shares of Off-trade RTD Coffee: % Value 2020-2023

  Table 100 Forecast Off-trade Sales of RTD Coffee: Volume 2023-2028
- Table 101 Forecast Off-trade Sales of RTD Coffee: Value 2023-2028
- Table 102 Forecast Off-trade Sales of RTD Coffee: % Volume Growth 2023-2028
- Table 103 Forecast Off-trade Sales of RTD Coffee: % Value Growth 2023-2028

# RTD Tea in Belgium

# KEY DATA FINDINGS

# 2023 DEVELOPMENTS

Inflationary pressures negatively affect demand for RTD tea

RTD tea's transition towards healthier options and new distribution channels

Lipton and Fuze tea: Former leaders facing challenges

# PROSPECTS AND OPPORTUNITIES

Shift towards quality

Expansion of natural and functional RTD tea

#### Challenges facing kombucha

#### **CATEGORY DATA**

- Table 104 Off-trade Sales of RTD Tea by Category: Volume 2018-2023
- Table 105 Off-trade Sales of RTD Tea by Category: Value 2018-2023
- Table 106 Off-trade Sales of RTD Tea by Category: % Volume Growth 2018-2023
- Table 107 Off-trade Sales of RTD Tea by Category: % Value Growth 2018-2023
- Table 108 Leading Flavours for Off-trade RTD Tea: % Volume 2018-2023
- Table 109 NBO Company Shares of Off-trade RTD Tea: % Volume 2019-2023
- Table 110 LBN Brand Shares of Off-trade RTD Tea: % Volume 2020-2023
- Table 111 NBO Company Shares of Off-trade RTD Tea: % Value 2019-2023
- Table 112 LBN Brand Shares of Off-trade RTD Tea: % Value 2020-2023
- Table 113 Forecast Off-trade Sales of RTD Tea by Category: Volume 2023-2028
- Table 114 Forecast Off-trade Sales of RTD Tea by Category: Value 2023-2028
- Table 115 Forecast Off-trade Sales of RTD Tea by Category: % Volume Growth 2023-2028
- Table 116 Forecast Off-trade Sales of RTD Tea by Category: % Value Growth 2023-2028

# Energy Drinks in Belgium

#### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Robust double-digit growth in energy drinks

Crucial role of flavour innovation

Rise of healthier and functional energy drinks

#### PROSPECTS AND OPPORTUNITIES

Anticipated growth in penetration

Healthier and functional options to elevate energy drinks

Expansion of new distribution channels

## **CATEGORY DATA**

- Table 117 Off-trade Sales of Energy Drinks: Volume 2018-2023
- Table 118 Off-trade Sales of Energy Drinks: Value 2018-2023
- Table 119 Off-trade Sales of Energy Drinks: % Volume Growth 2018-2023
- Table 120 Off-trade Sales of Energy Drinks: % Value Growth 2018-2023
- Table 121 NBO Company Shares of Off-trade Energy Drinks: % Volume 2019-2023
- Table 122 LBN Brand Shares of Off-trade Energy Drinks: % Volume 2020-2023
- Table 123 NBO Company Shares of Off-trade Energy Drinks: % Value 2019-2023
- Table 124 LBN Brand Shares of Off-trade Energy Drinks: % Value 2020-2023
- Table 125 Forecast Off-trade Sales of Energy Drinks: Volume 2023-2028
- Table 126 Forecast Off-trade Sales of Energy Drinks: Value 2023-2028
- Table 127 Forecast Off-trade Sales of Energy Drinks: % Volume Growth 2023-2028
- Table 128 Forecast Off-trade Sales of Energy Drinks: % Value Growth 2023-2028

# Sports Drinks in Belgium

# **KEY DATA FINDINGS**

## 2023 DEVELOPMENTS

Upward trend fuelled by functional beverages Aquarius brings renewal in sports drinks

Emergence of competing functional drinks

## PROSPECTS AND OPPORTUNITIES

Foreseen stability in sports drinks Potential areas for development Emphasis on healthier sports drinks

#### CATEGORY DATA

Table 129 - Off-trade Sales of Sports Drinks: Volume 2018-2023

Table 130 - Off-trade Sales of Sports Drinks: Value 2018-2023

Table 131 - Off-trade Sales of Sports Drinks: % Volume Growth 2018-2023

Table 132 - Off-trade Sales of Sports Drinks: % Value Growth 2018-2023

Table 133 - NBO Company Shares of Off-trade Sports Drinks: % Volume 2019-2023

Table 134 - LBN Brand Shares of Off-trade Sports Drinks: % Volume 2020-2023

Table 135 - NBO Company Shares of Off-trade Sports Drinks: % Value 2019-2023

Table 136 - LBN Brand Shares of Off-trade Sports Drinks: % Value 2020-2023

Table 137 - Forecast Off-trade Sales of Sports Drinks: Volume 2023-2028

Table 138 - Forecast Off-trade Sales of Sports Drinks: Value 2023-2028

Table 139 - Forecast Off-trade Sales of Sports Drinks: % Volume Growth 2023-2028

Table 140 - 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-belgium/report.