

Carbonates in Western Europe

April 2022

Table of Contents

INTRODUCTION

Scope

Key findings

REGIONAL OVERVIEW

Home seclusion revitalises the potential of carbonates

Carbonates maintain major gains post-lockdown

Low calorie variants drive cola dynamism

Heightened health and nutrition concerns affect markets differently

Cola carbonates show competitiveness despite limited potential for growth

Shifting patterns of behaviour and adjusting patterns of consumption

Supermarkets maintain the lead, e-commerce grows rapidly (1)

Supermarkets maintain the lead, e-commerce grows rapidly (2)

LEADING COMPANIES AND BRANDS

Cola carbonates drive consolidation among larger players

Major players consolidate market lead through the pandemic

Smaller brands capitalise on non-cola carbonates' potential

Reduced sugar brands to reach point to lead the market

FORECAST PROJECTIONS

Some stagnation in off-trade per capita consumption growth

Off-trade growth likely modest at best, except Turkey and Scandinavia

COUNTRY SNAPSHOTS

Austria: Market Context

Austria: Competitive and Retail Landscape

Belgium: Market Context

Belgium: Competitive and Retail Landscape

Denmark: Market Context

Denmark: Competitive and Retail Landscape

Finland: Market Context

Finland: Competitive and Retail Landscape

France: Market Context

France: Competitive and Retail Landscape

Greece: Market Context

Greece: Competitive and Retail Landscape

Ireland: Market Context

Ireland: Competitive and Retail Landscape

Italy: Market Context

Italy: Competitive and Retail Landscape

Netherlands: Market Context

Netherlands: Competitive and Retail Landscape

Norway: Market Context

Norway: Competitive and Retail Landscape

Portugal: Market Context

Portugal: Competitive and Retail Landscape

Spain: Market Context

Spain: Competitive and Retail Landscape

Sweden: Market Context

Sweden: Competitive and Retail Landscape

Switzerland: Market Context

Switzerland: Competitive and Retail Landscape

Turkey: Market Context

Turkey: Competitive and Retail Landscape

UK: Market Context

UK: Competitive and Retail Landscape

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