

# Soft Drinks in Germany

January 2024

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 Germany

Trends

### DISCLAIMER

## SOURCES

Summary 1 - Research Sources

### Bottled Water in Germany

## KEY DATA FINDINGS

### 2023 DEVELOPMENTS

Bottled water vs. tap water

Brands under pressure as consumers aim to cut costs

Winning consumers' trust through efforts to prove sustainability

### PROSPECTS AND OPPORTUNITIES

Private label gains traction and becomes seen as a brand itself

Demand for functionality will fuel growth for functional bottled water, but it will compete with other soft drinks categories

On-trade, bottled water will be a leading choice for hydration

### 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 Germany

## KEY DATA FINDINGS

### 2023 DEVELOPMENTS

Sugar reduction remains key to success

On-trade recovers slowly, but consumers face financial challenges

Mixers benefits from the aperitif trend

### PROSPECTS AND OPPORTUNITIES

Competition will come from other soft drinks categories

Consumers seek brands that correspond with their values

Health awareness will determine the future

### 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 Germany

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Home mixing trend fuelled by demand for packaging-saving solutions  
 Increasing brand activity and innovation  
 Polarisation: Private label vs premium

### PROSPECTS AND OPPORTUNITIES

Innovation set to drive success through reducing sugar and packaging  
 Hydration in new formats  
 Inflation: Challenges and opportunities

### 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 Germany

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Consumers cut their expenses – and sugar consumption  
 On-trade recovers slowly  
 Sourcing is becoming more difficult

## PROSPECTS AND OPPORTUNITIES

Juice consumption set to decline further, but juice will gain popularity as an ingredient

Functional juices: Added vitamins for health

Sustainable juices as part of a healthier diet for the body and the planet

## 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 Germany

## KEY DATA FINDINGS

### 2023 DEVELOPMENTS

RTD coffee is popular for its convenience

Inflation spurs sales in discounters, and sales of private label products

Coffee expertise is paramount for RTD coffee

## PROSPECTS AND OPPORTUNITIES

Do-it-yourself iced coffee competes with RTD coffee

Sustainability will remain essential

Innovation likely to drive future success

## 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 Germany

## KEY DATA FINDINGS

### 2023 DEVELOPMENTS

Stagnation due to competition from other categories

On-trade recovery on the horizon

Concerns about sugar consumption drive sales of reduced sugar still RTD tea

## PROSPECTS AND OPPORTUNITIES

Do-it-yourself iced tea threatens sales of RTD tea

Continued impact of hot summers

Growing influence of sustainability

## 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 Germany

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Energy drinks remains one of the most dynamic soft drinks categories

Innovation slowdown in 2023

Red Bull holds pole position, yet private label also becomes more attractive

### PROSPECTS AND OPPORTUNITIES

Influence of inflation on consumption habits

Health scrutiny and regulation

Competition from healthier alternatives

## 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 Germany

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Many people do sports, but too many still do not  
Competition from other categories a threat and an opportunity  
Mega sports event UEFA Euro 2024 offers opportunities

PROSPECTS AND OPPORTUNITIES

Increased competition from other soft drinks categories  
Competition from other hydration innovations  
How technology could shape the future of 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

Asian Speciality Drinks in Germany

KEY DATA FINDINGS

2023 DEVELOPMENTS

The off-trade drives demand, and supermarkets raise awareness of Asian speciality drinks  
Players in Asian speciality drinks follow demand for claims which align with the “natural” trend  
The impact of regional demographics on the landscape of Asian speciality drinks in Germany

PROSPECTS AND OPPORTUNITIES

Demand for healthier beverages presents an opportunity  
Asian cuisines and beverages will influence the health-conscious youth population  
Growing Asian population and cultural hubs will maintain fairly stable demand

CATEGORY DATA

- Table 145 - Off-trade Sales of Asian Speciality Drinks: Volume 2018-2023
- Table 146 - Off-trade Sales of Asian Speciality Drinks: Value 2018-2023
- Table 147 - Off-trade Sales of Asian Speciality Drinks: % Volume Growth 2018-2023
- Table 148 - Off-trade Sales of Asian Speciality Drinks: % Value Growth 2018-2023
- Table 149 - NBO Company Shares of Off-trade Asian Speciality Drinks: % Volume 2019-2023
- Table 150 - LBN Brand Shares of Off-trade Asian Speciality Drinks: % Volume 2020-2023
- Table 151 - NBO Company Shares of Off-trade Asian Speciality Drinks: % Value 2019-2023
- Table 152 - LBN Brand Shares of Off-trade Asian Speciality Drinks: % Value 2020-2023
- Table 153 - Forecast Off-trade Sales of Asian Speciality Drinks: Volume 2023-2028
- Table 154 - Forecast Off-trade Sales of Asian Speciality Drinks: Value 2023-2028
- Table 155 - Forecast Off-trade Sales of Asian Speciality Drinks: % Volume Growth 2023-2028
- Table 156 - Forecast Off-trade Sales of Asian Speciality Drinks: % Value Growth 2023-2028

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-germany/report](http://www.euromonitor.com/soft-drinks-in-germany/report).