



RTD Coffee in Germany

January 2026

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RTD Coffee in Germany - Category analysis

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2025 DEVELOPMENTS

Convenience trend drives category growth

INDUSTRY PERFORMANCE

High prices limit the appeal of RTD coffee

Premiumisation shapes innovation

WHAT'S NEXT?

Iced coffee trend presents opportunities and challenges

Innovation as a growth engine for RTD coffee

Sustainability and transparency to be key factors for both consumers and producers

COMPETITIVE LANDSCAPE

Private label gains momentum amidst economic pressures

Starbucks continues to capitalise on unique positioning in RTD coffee

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Wide choice and proximity favour supermarkets

On-the-go consumption trend boosts sales through convenience retailers

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EXECUTIVE SUMMARY

Health and wellness, price and nostalgia are key factors in consumers' purchasing decisions

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Cost-savings without compromising on quality

Health and wellness increasingly shapes offer and demand

Changing foodservice consumption supports a demand for soft drinks

WHAT'S NEXT?

Sober trend to favour soft drinks consumption

Diversification to cover consumers' needs

Retail to maintain dominance despite recovery of foodservice

COMPETITIVE LANDSCAPE

Aldi is adding premium value to diversify its offer

Paulaner Brauerei shows dynamism through a retro and nostalgia appeal

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