

# Soft Drinks in Western Europe

March 2024

Table of Contents

## INTRODUCTION

Scope

Key findings

## REGIONAL OVERVIEW

Western Europe has the second highest per capita consumption rate for soft drinks

Flatlining volume growth expected in the coming years

Western Europe has the second highest per capita consumption of bottled water

Energy drinks recording dynamic growth in a number of countries

Bottled water records big losses in Germany over 2018-2023

Energy drinks and RTD coffee the most dynamic categories over 2018-2023

In spite of rising prices, the trend towards healthier products continues to be seen

Modern grocery retailers dominate soft drinks distribution in Western Europe

Small local grocers still lead in Turkey, but discounters are gaining share

## LEADING COMPANIES AND BRANDS

Relatively fragmented competitive landscape in Germany, with private label to the fore

Coca-Cola remains a strong leader among the brand owners in Western Europe

Multinationals and national bottled water players make up the top 10 players

Coca-Cola continues to head up the brand rankings

## FORECAST PROJECTIONS

Near stagnation is expected in off-trade volume terms over 2023-2028

Modest growth expected in real value terms

## 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

Germany: Market Context

Germany: 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

## 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-western-europe/report](http://www.euromonitor.com/soft-drinks-in-western-europe/report).