



Euromonitor  
International

# Soft Drinks in Germany

December 2024

Table of Contents

### EXECUTIVE SUMMARY

Soft drinks in 2024: The big picture

2024 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 2019-2024

Table 2 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2019-2024

Table 3 - Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2019-2024

Table 4 - Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2019-2024

Table 5 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: Volume 2024

Table 6 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: % Volume 2024

Table 7 - Off-trade vs On-trade Sales of Soft Drinks by Category: Value 2024

Table 8 - Off-trade vs On-trade Sales of Soft Drinks by Category: % Value 2024

Table 9 - Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2019-2024

Table 10 - Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2019-2024

Table 11 - Off-trade Sales of Soft Drinks by Category: Value 2019-2024

Table 12 - Off-trade Sales of Soft Drinks by Category: % Value Growth 2019-2024

Table 13 - Sales of Soft Drinks by Total Fountain On-trade: Volume 2019-2024

Table 14 - Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2019-2024

Table 15 - NBO Company Shares of Total Soft Drinks (RTD): % Volume 2020-2024

Table 16 - LBN Brand Shares of Total Soft Drinks (RTD): % Volume 2021-2024

Table 17 - NBO Company Shares of On-trade Soft Drinks (RTD): % Volume 2020-2024

Table 18 - LBN Brand Shares of On-trade Soft Drinks (RTD): % Volume 2021-2024

Table 19 - NBO Company Shares of Off-trade Soft Drinks (RTD): % Volume 2020-2024

Table 20 - LBN Brand Shares of Off-trade Soft Drinks (RTD): % Volume 2021-2024

Table 21 - NBO Company Shares of Off-trade Soft Drinks: % Value 2020-2024

Table 22 - LBN Brand Shares of Off-trade Soft Drinks: % Value 2021-2024

Table 23 - Penetration of Private Label in Off-trade Soft Drinks (RTD) by Category: % Volume 2019-2024

Table 24 - Penetration of Private Label in Off-trade Soft Drinks by Category: % Value 2019-2024

Table 25 - Distribution of Off-trade Soft Drinks (as sold) by Format: % Volume 2019-2024

Table 26 - Distribution of Off-trade Soft Drinks (as sold) by Format and Category: % Volume 2024

Table 27 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2024-2029

Table 28 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2024-2029

Table 29 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2024-2029

Table 30 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2024-2029

Table 31 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2024-2029

Table 32 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2024-2029

Table 33 - Forecast Off-trade Sales of Soft Drinks by Category: Value 2024-2029

Table 34 - Forecast Off-trade Sales of Soft Drinks by Category: % Value Growth 2024-2029

Table 35 - Forecast Sales of Soft Drinks by Total Fountain On-trade: Volume 2024-2029

Table 36 - Forecast Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2024-2029

### APPENDIX

Fountain sales in Germany

### DISCLAIMER

### SOURCES

Bottled Water in Germany

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Price-sensitive consumers increasingly choose tap water over bottled format
- Cost pressures and changing consumer preferences
- Building trust through sustainability efforts

PROSPECTS AND OPPORTUNITIES

- On-trade channel and bottled water in a warming climate
- Functional bottled water: A growing and competitive niche
- Private label is evolving into trusted alternative to brands

CATEGORY DATA

- Table 37 - Off-trade Sales of Bottled Water by Category: Volume 2019-2024
- Table 38 - Off-trade Sales of Bottled Water by Category: Value 2019-2024
- Table 39 - Off-trade Sales of Bottled Water by Category: % Volume Growth 2019-2024
- Table 40 - Off-trade Sales of Bottled Water by Category: % Value Growth 2019-2024
- Table 41 - NBO Company Shares of Off-trade Bottled Water: % Volume 2020-2024
- Table 42 - LBN Brand Shares of Off-trade Bottled Water: % Volume 2021-2024
- Table 43 - NBO Company Shares of Off-trade Bottled Water: % Value 2020-2024
- Table 44 - LBN Brand Shares of Off-trade Bottled Water: % Value 2021-2024
- Table 45 - Forecast Off-trade Sales of Bottled Water by Category: Volume 2024-2029
- Table 46 - Forecast Off-trade Sales of Bottled Water by Category: Value 2024-2029
- Table 47 - Forecast Off-trade Sales of Bottled Water by Category: % Volume Growth 2024-2029
- Table 48 - Forecast Off-trade Sales of Bottled Water by Category: % Value Growth 2024-2029

Carbonates in Germany

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Sugar reduction as a key demand driver of carbonates
- On-trade recovery despite economic pressures
- Mixers remains popular due to aperitif trends

PROSPECTS AND OPPORTUNITIES

- Competition across soft drinks to intensify and place pressure on carbonates
- Health awareness set to shape the future
- Brands must align with consumer values

CATEGORY DATA

- Table 49 - Off-trade vs On-trade Sales of Carbonates: Volume 2019-2024
- Table 50 - Off-trade vs On-trade Sales of Carbonates: Value 2019-2024
- Table 51 - Off-trade vs On-trade Sales of Carbonates: % Volume Growth 2019-2024
- Table 52 - Off-trade vs On-trade Sales of Carbonates: % Value Growth 2019-2024
- Table 53 - Off-trade Sales of Carbonates by Category: Volume 2019-2024
- Table 54 - Off-trade Sales of Carbonates by Category: Value 2019-2024
- Table 55 - Off-trade Sales of Carbonates by Category: % Volume Growth 2019-2024
- Table 56 - Off-trade Sales of Carbonates by Category: % Value Growth 2019-2024
- Table 57 - Total Sales of Carbonates by Fountain On-trade: Volume 2019-2024

Table 58 - Total Sales of Carbonates by Fountain On-trade: % Volume Growth 2019-2024

Table 59 - NBO Company Shares of Off-trade Carbonates: % Volume 2020-2024

Table 60 - LBN Brand Shares of Off-trade Carbonates: % Volume 2021-2024

Table 61 - NBO Company Shares of Off-trade Carbonates: % Value 2020-2024

Table 62 - LBN Brand Shares of Off-trade Carbonates: % Value 2021-2024

Table 63 - Forecast Off-trade Sales of Carbonates by Category: Volume 2024-2029

Table 64 - Forecast Off-trade Sales of Carbonates by Category: Value 2024-2029

Table 65 - Forecast Off-trade Sales of Carbonates by Category: % Volume Growth 2024-2029

Table 66 - Forecast Off-trade Sales of Carbonates by Category: % Value Growth 2024-2029

Table 67 - Forecast Total Sales of Carbonates by Fountain On-trade: Volume 2024-2029

Table 68 - Forecast Total Sales of Carbonates by Fountain On-trade: % Volume Growth 2024-2029

## Concentrates in Germany

### KEY DATA FINDINGS

#### 2024 DEVELOPMENTS

Concentrates benefits from home preparation and reduced packaging solutions

Growing brand activity and innovation amid economic challenges

Polarisation between private label and premium options

#### PROSPECTS AND OPPORTUNITIES

Innovation to drive success through sugar reduction and sustainable packaging solutions

Hydration in innovative formats

Navigating 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 2019-2024

Table 70 - Off-trade Sales of Concentrates (RTD) by Category: % Volume Growth 2019-2024

Table 71 - Off-trade Sales of Concentrates by Category: Value 2019-2024

Table 72 - Off-trade Sales of Concentrates by Category: % Value Growth 2019-2024

Table 73 - LBN Brand Shares of Off-trade Concentrates (RTD): % Volume 2021-2024

Table 74 - NBO Company Shares of Off-trade Concentrates: % Value 2020-2024

Table 75 - LBN Brand Shares of Off-trade Concentrates: % Value 2021-2024

Table 76 - NBO Company Shares of Off-trade Liquid Concentrates (RTD): % Volume 2020-2024

Table 77 - LBN Brand Shares of Off-trade Liquid Concentrates (RTD): % Volume 2021-2024

Table 78 - NBO Company Shares of Off-trade Powder Concentrates (RTD): % Volume 2020-2024

Table 79 - LBN Brand Shares of Off-trade Powder Concentrates (RTD): % Volume 2021-2024

Table 80 - Forecast Off-trade Sales of Concentrates (RTD) by Category: Volume 2024-2029

Table 81 - Forecast Off-trade Sales of Concentrates (RTD) by Category: % Volume Growth 2024-2029

Table 82 - Forecast Off-trade Sales of Concentrates by Category: Value 2024-2029

Table 83 - Forecast Off-trade Sales of Concentrates by Category: % Value Growth 2024-2029

## Juice in Germany

### KEY DATA FINDINGS

#### 2024 DEVELOPMENTS

Consumer focus on expense management and sugar reduction

On-trade recovery and shifts in consumption patterns

Rising challenges in sourcing and costs

## PROSPECTS AND OPPORTUNITIES

Declining juice consumption balanced by expansion of use occasions

Functional juice to drive health innovation

A sustainable future: Healthier juice for people and the planet

## CATEGORY DATA

Table 84 - Off-trade Sales of Juice by Category: Volume 2019-2024

Table 85 - Off-trade Sales of Juice by Category: Value 2019-2024

Table 86 - Off-trade Sales of Juice by Category: % Volume Growth 2019-2024

Table 87 - Off-trade Sales of Juice by Category: % Value Growth 2019-2024

Table 88 - NBO Company Shares of Off-trade Juice: % Volume 2020-2024

Table 89 - LBN Brand Shares of Off-trade Juice: % Volume 2021-2024

Table 90 - NBO Company Shares of Off-trade Juice: % Value 2020-2024

Table 91 - LBN Brand Shares of Off-trade Juice: % Value 2021-2024

Table 92 - Forecast Off-trade Sales of Juice by Category: Volume 2024-2029

Table 93 - Forecast Off-trade Sales of Juice by Category: Value 2024-2029

Table 94 - Forecast Off-trade Sales of Juice by Category: % Volume Growth 2024-2029

Table 95 - Forecast Off-trade Sales of Juice by Category: % Value Growth 2024-2029

## RTD Coffee in Germany

## KEY DATA FINDINGS

## 2024 DEVELOPMENTS

RTD coffee relies on convenience

Premiumisation and coffee expertise define category

Private label RTD coffee dominates amid financial challenges

## PROSPECTS AND OPPORTUNITIES

Home brewing of iced coffee to increasingly compete with RTD coffee

Sustainability will be a key differentiator

Innovation in functional and plant-based RTD coffee

## CATEGORY DATA

Table 96 - Off-trade Sales of RTD Coffee: Volume 2019-2024

Table 97 - Off-trade Sales of RTD Coffee: Value 2019-2024

Table 98 - Off-trade Sales of RTD Coffee: % Volume Growth 2019-2024

Table 99 - Off-trade Sales of RTD Coffee: % Value Growth 2019-2024

Table 100 - NBO Company Shares of Off-trade RTD Coffee: % Volume 2020-2024

Table 101 - LBN Brand Shares of Off-trade RTD Coffee: % Volume 2021-2024

Table 102 - NBO Company Shares of Off-trade RTD Coffee: % Value 2020-2024

Table 103 - LBN Brand Shares of Off-trade RTD Coffee: % Value 2021-2024

Table 104 - Forecast Off-trade Sales of RTD Coffee: Volume 2024-2029

Table 105 - Forecast Off-trade Sales of RTD Coffee: Value 2024-2029

Table 106 - Forecast Off-trade Sales of RTD Coffee: % Volume Growth 2024-2029

Table 107 - Forecast Off-trade Sales of RTD Coffee: % Value Growth 2024-2029

## RTD Tea in Germany

## KEY DATA FINDINGS

## 2024 DEVELOPMENTS

Stagnation amid intense competition

On-trade sales remain relevant in local market

Health-conscious consumer trends drive innovation

## PROSPECTS AND OPPORTUNITIES

Home-made beverages to challenge RTD tea sales

Hot summers can drive demand for iced tea

Sustainability to shape the future of RTD tea

## CATEGORY DATA

Table 108 - Off-trade Sales of RTD Tea by Category: Volume 2019-2024

Table 109 - Off-trade Sales of RTD Tea by Category: Value 2019-2024

Table 110 - Off-trade Sales of RTD Tea by Category: % Volume Growth 2019-2024

Table 111 - Off-trade Sales of RTD Tea by Category: % Value Growth 2019-2024

Table 112 - Leading Flavours for Off-trade RTD Tea: % Volume 2019-2024

Table 113 - NBO Company Shares of Off-trade RTD Tea: % Volume 2020-2024

Table 114 - LBN Brand Shares of Off-trade RTD Tea: % Volume 2021-2024

Table 115 - NBO Company Shares of Off-trade RTD Tea: % Value 2020-2024

Table 116 - LBN Brand Shares of Off-trade RTD Tea: % Value 2021-2024

Table 117 - Forecast Off-trade Sales of RTD Tea by Category: Volume 2024-2029

Table 118 - Forecast Off-trade Sales of RTD Tea by Category: Value 2024-2029

Table 119 - Forecast Off-trade Sales of RTD Tea by Category: % Volume Growth 2024-2029

Table 120 - Forecast Off-trade Sales of RTD Tea by Category: % Value Growth 2024-2029

## Energy Drinks in Germany

### KEY DATA FINDINGS

#### 2024 DEVELOPMENTS

Energy drinks maintains strong growth trajectory in 2024

Innovation in energy drinks slows amid economic pressures

Red Bull retains leadership amid growing competition

## PROSPECTS AND OPPORTUNITIES

Impact of inflation likely to remain relevant heading into forecast period

Increasing health scrutiny and potential regulations

Growing competition from perceived healthier alternatives

## CATEGORY DATA

Table 121 - Off-trade Sales of Energy Drinks: Volume 2019-2024

Table 122 - Off-trade Sales of Energy Drinks: Value 2019-2024

Table 123 - Off-trade Sales of Energy Drinks: % Volume Growth 2019-2024

Table 124 - Off-trade Sales of Energy Drinks: % Value Growth 2019-2024

Table 125 - NBO Company Shares of Off-trade Energy Drinks: % Volume 2020-2024

Table 126 - LBN Brand Shares of Off-trade Energy Drinks: % Volume 2021-2024

Table 127 - NBO Company Shares of Off-trade Energy Drinks: % Value 2020-2024

Table 128 - LBN Brand Shares of Off-trade Energy Drinks: % Value 2021-2024

Table 129 - Forecast Off-trade Sales of Energy Drinks: Volume 2024-2029

Table 130 - Forecast Off-trade Sales of Energy Drinks: Value 2024-2029

Table 131 - Forecast Off-trade Sales of Energy Drinks: % Volume Growth 2024-2029

Table 132 - Forecast Off-trade Sales of Energy Drinks: % Value Growth 2024-2029

## Sports Drinks in Germany

### KEY DATA FINDINGS

#### 2024 DEVELOPMENTS

Greater participation in physical activity continues to support demand for sports drinks  
Blurring lines with functional beverages  
Leveraging major sports events to boost category sales

PROSPECTS AND OPPORTUNITIES

Intensifying competition from other soft drinks  
Hydration innovation and the rise of new formats  
Technological integration and personalisation of sports drinks

CATEGORY DATA

- Table 133 - Off-trade Sales of Sports Drinks: Volume 2019-2024
- Table 134 - Off-trade Sales of Sports Drinks: Value 2019-2024
- Table 135 - Off-trade Sales of Sports Drinks: % Volume Growth 2019-2024
- Table 136 - Off-trade Sales of Sports Drinks: % Value Growth 2019-2024
- Table 137 - NBO Company Shares of Off-trade Sports Drinks: % Volume 2020-2024
- Table 138 - LBN Brand Shares of Off-trade Sports Drinks: % Volume 2021-2024
- Table 139 - NBO Company Shares of Off-trade Sports Drinks: % Value 2020-2024
- Table 140 - LBN Brand Shares of Off-trade Sports Drinks: % Value 2021-2024
- Table 141 - Forecast Off-trade Sales of Sports Drinks: Volume 2024-2029
- Table 142 - Forecast Off-trade Sales of Sports Drinks: Value 2024-2029
- Table 143 - Forecast Off-trade Sales of Sports Drinks: % Volume Growth 2024-2029
- Table 144 - Forecast Off-trade Sales of Sports Drinks: % Value Growth 2024-2029

Asian Speciality Drinks in Germany

KEY DATA FINDINGS

2024 DEVELOPMENTS

Off-trade continues to drive demand, with expanding distribution raising awareness  
Health-conscious consumers drive demand for “natural” claims  
Regional demographics continue to shape the demand for Asian speciality drinks

PROSPECTS AND OPPORTUNITIES

Demand for healthier beverages presents an opportunity  
Asian cuisine and beverages will influence the health-conscious young population  
Growing Asian population and cultural hubs to support sales

CATEGORY DATA

- Table 145 - Off-trade Sales of Asian Speciality Drinks: Volume 2019-2024
- Table 146 - Off-trade Sales of Asian Speciality Drinks: Value 2019-2024
- Table 147 - Off-trade Sales of Asian Speciality Drinks: % Volume Growth 2019-2024
- Table 148 - Off-trade Sales of Asian Speciality Drinks: % Value Growth 2019-2024
- Table 149 - NBO Company Shares of Off-trade Asian Speciality Drinks: % Volume 2020-2024
- Table 150 - LBN Brand Shares of Off-trade Asian Speciality Drinks: % Volume 2021-2024
- Table 151 - NBO Company Shares of Off-trade Asian Speciality Drinks: % Value 2020-2024
- Table 152 - LBN Brand Shares of Off-trade Asian Speciality Drinks: % Value 2021-2024
- Table 153 - Forecast Off-trade Sales of Asian Speciality Drinks: Volume 2024-2029
- Table 154 - Forecast Off-trade Sales of Asian Speciality Drinks: Value 2024-2029
- Table 155 - Forecast Off-trade Sales of Asian Speciality Drinks: % Volume Growth 2024-2029
- Table 156 - Forecast Off-trade Sales of Asian Speciality Drinks: % Value Growth 2024-2029

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).