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Soft Drinks in the Czech Republic

November 2025

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EXECUTIVE SUMMARY

Economic stabilisation supports a steadying of soft drinks consumption despite continued price sensitivity

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Price sensitivity and discount reliance continue to shape purchasing behaviour

Health and wellness trends sustain premium pockets of growth

Innovation accelerates as brands target younger and health-conscious consumers

WHAT'S NEXT?

Functional innovation and reduced-sugar formulations will underpin forecast growth

Potential legislative changes create uncertainty around sugar and energy drinks

Channel fragmentation will intensify, supported by e-commerce and expanded retail networks

COMPETITIVE LANDSCAPE

Leading companies consolidate their positions through broad portfolios and innovation

Dynamic players benefit from category momentum and strong innovation pipelines

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Functional bottled water drives category dynamism and reshapes value growth

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Volume stability expected, with functional waters shaping future growth

Digital and technological advancements broaden access and support premiumisation

Health and wellness continues to define category positioning

COMPETITIVE LANDSCAPE

Mattoni 1873 strengthens leadership through broad portfolio and sustained innovation

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Digital and technological advancements expand choice while supporting reduced sugar innovation

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COMPETITIVE LANDSCAPE

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Liquid concentrates remain more dynamic but still experience declining demand

WHAT'S NEXT?

Category expected to continue declining as modern RTD alternatives capture demand

E-commerce and digitalisation create opportunities for flavour expansion and niche offerings

Health and wellness priorities drive sugar reduction and support new product development

COMPETITIVE LANDSCAPE

Kofola maintains leadership through strong brand presence and broad distribution

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Plant waters gain traction as the most dynamic segment

WHAT'S NEXT?

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Digital and technological developments support channel expansion and new product formats
Health and wellness and potential sugar taxation accelerate shift toward low-sugar and fortified products

COMPETITIVE LANDSCAPE

Maspex Czech remains the leading player with broad distribution and strong brand equity
Linea Nivnice records the strongest growth through affordable innovation and broader flavour mixes

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[RTD Coffee in the Czech Republic](#)

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INDUSTRY PERFORMANCE

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WHAT'S NEXT?

RTD coffee to sustain strong growth as chilled formats diversify and younger consumers drive adoption
Digital marketing, dairy-free innovation and packaging advances support premiumisation
Health and wellness trends and possible sugar legislation shape future development

COMPETITIVE LANDSCAPE

Nestlé maintains category leadership through strong brand equity and extensive distribution
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RTD tea expands rapidly as consumer interest shifts towards healthier and lower-sugar beverages

Carbonated RTD tea and kombucha leads growth as functional attributes drive engagement

WHAT'S NEXT?

RTD tea expected to maintain strong growth as kombucha and premium reduced-sugar options expand

Digital expansion supports visibility, flavour experimentation, and premium positioning

Health and wellness and potential future regulation reinforce the shift to reduced-sugar variants

COMPETITIVE LANDSCAPE

Mattoni 1873 leads through strong brand equity, broad reach and sustained innovation

Maspex Czech records dynamic growth with health-aligned Nestea innovations

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WHAT'S NEXT?

Category to remain on a growth path but faces uncertainty from regulatory developments

Digital-first marketing, premiumisation and craft-style innovation to shape brand differentiation

Legislative tightening to prompt reformulation and stronger responsible marketing practices

COMPETITIVE LANDSCAPE

Red Bull retains market leadership with strong brand equity and omnichannel visibility

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INDUSTRY PERFORMANCE

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Category growth expected to soften as competition intensifies

Digital expansion and specialised retail channels increase access and visibility

Health and wellness trends drive demand for clearer functional positioning

COMPETITIVE LANDSCAPE

Coca-Cola HBC strengthens its lead through visibility and distribution scale
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