



Carbonates in the Czech Republic

November 2025

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Carbonates in the Czech Republic - Category analysis

KEY DATA FINDINGS

2025 DEVELOPMENTS

Reduced-sugar innovation and a colder summer shape category performance in 2025

INDUSTRY PERFORMANCE

Volume declines reflect weather effects and rising substitution toward healthier beverages

Reduced sugar variants outperform as innovation and health trends converge

WHAT'S NEXT?

Discount reliance and shifting consumption patterns will shape future volume growth

Digital and technological advancements expand choice while supporting reduced sugar innovation

Health and wellness trends and potential sugar tax implications will reinforce the shift toward no-sugar carbonates

COMPETITIVE LANDSCAPE

Coca-Cola HBC strengthens its leading position with a broad portfolio and strong execution

Coca-Cola HBC records the strongest volume growth through portfolio expansion and targeted innovation

CHANNELS

Hypermarkets lead due to assortment breadth and strong promotional mechanics

E-commerce grows fastest while discounters gain share through convenience and pricing

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EXECUTIVE SUMMARY

Economic stabilisation supports a steady 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

CHANNELS

Hypermarkets remain the leading channel due to assortment breadth and strong pricing
E-commerce and discounters are the most dynamic channels, while convenience reshapes offline shopping patterns
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