



Euromonitor
International

Concentrates in Austria

November 2025

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KEY DATA FINDINGS

2025 DEVELOPMENTS

Concentrates benefits from new deposit scheme

INDUSTRY PERFORMANCE

Concentrates benefits from new bottle deposit regulations

Liquid concentrates gaining appeal in the on-trade and off-trade

WHAT'S NEXT?

Upward trend in concentrates expected to continue

Plenty of untapped potential for new flavour variants in concentrates

Domestic brands and private label both pivotal to category growth

COMPETITIVE LANDSCAPE

Mautner Markhof extends its lead with a wide range of variants

Adolf Darbo finds success by promoting the premium quality of its syrups

CHANNELS

Supermarkets quick to respond to the impact of the new deposit scheme

E-commerce picks up share

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EXECUTIVE SUMMARY

New bottle deposit regulation deals a short-term blow to sales of soft drinks

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Mixed performances seen across soft drinks but overall sales decline in 2025

New bottle deposit scheme has a big impact on the market

On-trade sales continue to recover thanks to improving consumer sentiment

WHAT'S NEXT?

Players likely to respond to deposit scheme with new packaging innovations

Tap water could pose a threat to sales of soft drinks

New product development likely to focus on healthier options

COMPETITIVE LANDSCAPE

Coca-Cola retains the lead but loses share in 2025

Competition heats up with private label making further inroads

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