



Euromonitor
International

Soft Drinks in Austria

November 2025

Table of Contents

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

CHANNELS

Supermarkets dominate thanks to the channel's strong reach

Vending and e-commerce continue to win share but challenges remain

MARKET DATA

Table 1 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2020-2025

Table 2 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2020-2025

Table 3 - Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2020-2025

Table 4 - Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2020-2025

Table 5 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: Volume 2025

Table 6 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: % Volume 2025

Table 7 - Off-trade vs On-trade Sales of Soft Drinks by Category: Value 2025

Table 8 - Off-trade vs On-trade Sales of Soft Drinks by Category: % Value 2025

Table 9 - Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2020-2025

Table 10 - Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2020-2025

Table 11 - Off-trade Sales of Soft Drinks by Category: Value 2020-2025

Table 12 - Off-trade Sales of Soft Drinks by Category: % Value Growth 2020-2025

Table 13 - Sales of Soft Drinks by Total Fountain On-trade: Volume 2020-2025

Table 14 - Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2020-2025

Table 15 - NBO Company Shares of Total Soft Drinks (RTD): % Volume 2021-2025

Table 16 - LBN Brand Shares of Total Soft Drinks (RTD): % Volume 2022-2025

Table 17 - NBO Company Shares of On-trade Soft Drinks (RTD): % Volume 2021-2025

Table 18 - LBN Brand Shares of On-trade Soft Drinks (RTD): % Volume 2022-2025

Table 19 - NBO Company Shares of Off-trade Soft Drinks (RTD): % Volume 2021-2025

Table 20 - LBN Brand Shares of Off-trade Soft Drinks (RTD): % Volume 2022-2025

Table 21 - NBO Company Shares of Off-trade Soft Drinks: % Value 2021-2025

Table 22 - LBN Brand Shares of Off-trade Soft Drinks: % Value 2022-2025

Table 23 - Penetration of Private Label in Off-trade Soft Drinks (RTD) by Category: % Volume 2020-2025

Table 24 - Penetration of Private Label in Off-trade Soft Drinks by Category: % Value 2020-2025

Table 25 - Distribution of Off-trade Soft Drinks (as sold) by Format: % Volume 2020-2025

Table 26 - Distribution of Off-trade Soft Drinks (as sold) by Format and Category: % Volume 2025

Table 27 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2025-2030

Table 28 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2025-2030

Table 29 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2025-2030
Table 30 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2025-2030
Table 31 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2025-2030
Table 32 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2025-2030
Table 33 - Forecast Off-trade Sales of Soft Drinks by Category: Value 2025-2030
Table 34 - Forecast Off-trade Sales of Soft Drinks by Category: % Value Growth 2025-2030
Table 35 - Forecast Sales of Soft Drinks by Total Fountain On-trade: Volume 2025-2030
Table 36 - Forecast Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2025-2030

APPENDIX

Fountain sales in Austria

COUNTRY REPORTS DISCLAIMER

SOURCES

Summary 1 - Research Sources

[Bottled Water in Austria](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

New deposit scheme puts a dent in sales of bottled water

INDUSTRY PERFORMANCE

Trend Bottled water suffers from new, extended deposit regulations
Flavoured and functional bottled water the standout performers in 2025

WHAT'S NEXT?

Sales of bottled water set to rebound due to increasing health awareness
Long-term impact of new bottle deposit still difficult to assess
No breakthrough in sight for retail e-commerce in bottled water

COMPETITIVE LANDSCAPE

Vöslauer increases its lead in 2025 despite challenging conditions
Producers of functional bottled water and private label among the winners in 2025

CHANNELS

Supermarkets dominate sales of bottled water
Convenience is key as e-commerce, forecourt retailers and vending win share

CATEGORY DATA

Table 37 - Off-trade Sales of Bottled Water by Category: Volume 2020-2025
Table 38 - Off-trade Sales of Bottled Water by Category: Value 2020-2025
Table 39 - Off-trade Sales of Bottled Water by Category: % Volume Growth 2020-2025
Table 40 - Off-trade Sales of Bottled Water by Category: % Value Growth 2020-2025
Table 41 - NBO Company Shares of Off-trade Bottled Water: % Volume 2021-2025
Table 42 - LBN Brand Shares of Off-trade Bottled Water: % Volume 2022-2025
Table 43 - NBO Company Shares of Off-trade Bottled Water: % Value 2021-2025
Table 44 - LBN Brand Shares of Off-trade Bottled Water: % Value 2022-2025
Table 45 - Forecast Off-trade Sales of Bottled Water by Category: Volume 2025-2030
Table 46 - Forecast Off-trade Sales of Bottled Water by Category: Value 2025-2030
Table 47 - Forecast Off-trade Sales of Bottled Water by Category: % Volume Growth 2025-2030
Table 48 - Forecast Off-trade Sales of Bottled Water by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

Carbonates in Austria

KEY DATA FINDINGS

2025 DEVELOPMENTS

Sales of carbonates negatively impacted by deposit scheme

INDUSTRY PERFORMANCE

New deposit system hits sales of carbonates

Reduced sugar carbonates outperform regular options

WHAT'S NEXT?

Rising health awareness set to limit demand for carbonates

New deposit system might still play a role

E-commerce expected to win share

COMPETITIVE LANDSCAPE

Coca-Cola cements its dominance in carbonates with new product launches

Tonic water/mixers/other bitters a hotbed of activity and competition

CHANNELS

Supermarkets continue to dominate sales of carbonates

Vending and forecourt retailers tapping into the demand for round-the-clock access

CATEGORY DATA

Table 49 - Off-trade vs On-trade Sales of Carbonates: Volume 2020-2025

Table 50 - Off-trade vs On-trade Sales of Carbonates: Value 2020-2025

Table 51 - Off-trade vs On-trade Sales of Carbonates: % Volume Growth 2020-2025

Table 52 - Off-trade vs On-trade Sales of Carbonates: % Value Growth 2020-2025

Table 53 - Off-trade Sales of Carbonates by Category: Volume 2020-2025

Table 54 - Off-trade Sales of Carbonates by Category: Value 2020-2025

Table 55 - Off-trade Sales of Carbonates by Category: % Volume Growth 2020-2025

Table 56 - Off-trade Sales of Carbonates by Category: % Value Growth 2020-2025

Table 57 - Total Sales of Carbonates by Fountain On-trade: Volume 2020-2025

Table 58 - Total Sales of Carbonates by Fountain On-trade: % Volume Growth 2020-2025

Table 59 - NBO Company Shares of Off-trade Carbonates: % Volume 2021-2025

Table 60 - LBN Brand Shares of Off-trade Carbonates: % Volume 2022-2025

Table 61 - NBO Company Shares of Off-trade Carbonates: % Value 2021-2025

Table 62 - LBN Brand Shares of Off-trade Carbonates: % Value 2022-2025

Table 63 - Forecast Off-trade Sales of Carbonates by Category: Volume 2025-2030

Table 64 - Forecast Off-trade Sales of Carbonates by Category: Value 2025-2030

Table 65 - Forecast Off-trade Sales of Carbonates by Category: % Volume Growth 2025-2030

Table 66 - Forecast Off-trade Sales of Carbonates by Category: % Value Growth 2025-2030

Table 67 - Forecast Total Sales of Carbonates by Fountain On-trade: Volume 2025-2030

Table 68 - Forecast Total Sales of Carbonates by Fountain On-trade: % Volume Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

Concentrates in Austria

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

Concentrates Conversions

Summary 2 - Concentrates Conversion Factors for Ready-to-Drink (RTD) Format

CATEGORY DATA

Table 69 - Off-trade Sales of Concentrates (RTD) by Category: Volume 2020-2025

Table 70 - Off-trade Sales of Concentrates (RTD) by Category: % Volume Growth 2020-2025

Table 71 - Off-trade Sales of Concentrates by Category: Value 2020-2025

Table 72 - Off-trade Sales of Concentrates by Category: % Value Growth 2020-2025

Table 73 - LBN Brand Shares of Off-trade Concentrates (RTD): % Volume 2022-2025

Table 74 - NBO Company Shares of Off-trade Concentrates: % Value 2021-2025

Table 75 - LBN Brand Shares of Off-trade Concentrates: % Value 2022-2025

Table 76 - NBO Company Shares of Off-trade Liquid Concentrates (RTD): % Volume 2021-2025

Table 77 - LBN Brand Shares of Off-trade Liquid Concentrates (RTD): % Volume 2022-2025

Table 78 - NBO Company Shares of Off-trade Powder Concentrates (RTD): % Volume 2021-2025

Table 79 - LBN Brand Shares of Off-trade Powder Concentrates (RTD): % Volume 2022-2025

Table 80 - Forecast Off-trade Sales of Concentrates (RTD) by Category: Volume 2025-2030

Table 81 - Forecast Off-trade Sales of Concentrates (RTD) by Category: % Volume Growth 2025-2030

Table 82 - Forecast Off-trade Sales of Concentrates by Category: Value 2025-2030

Table 83 - Forecast Off-trade Sales of Concentrates by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

[Juice in Austria](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Juice bounces back thanks to price stability and new deposit scheme

INDUSTRY PERFORMANCE

Juice experiences a recovery in 2025 as prices stabilise

Economic considerations continue to influence demand

WHAT'S NEXT?

Growing health concerns set to have a mixed impact on demand for juice

Lasting impact of new deposit system not a problem for juice

Forecourt retailers and e-commerce set to win share thanks to their accessibility

COMPETITIVE LANDSCAPE

Rauch increases its lead through new product development
Innocent and Pfanner find success with healthier juice products

CHANNELS

Supermarkets continue to dominate sales of juice
The search for convenience benefits e-commerce and forecourt retailers

CATEGORY DATA

Table 84 - Off-trade Sales of Juice by Category: Volume 2020-2025
Table 85 - Off-trade Sales of Juice by Category: Value 2020-2025
Table 86 - Off-trade Sales of Juice by Category: % Volume Growth 2020-2025
Table 87 - Off-trade Sales of Juice by Category: % Value Growth 2020-2025
Table 88 - NBO Company Shares of Off-trade Juice: % Volume 2021-2025
Table 89 - LBN Brand Shares of Off-trade Juice: % Volume 2022-2025
Table 90 - NBO Company Shares of Off-trade Juice: % Value 2021-2025
Table 91 - LBN Brand Shares of Off-trade Juice: % Value 2022-2025
Table 92 - Forecast Off-trade Sales of Juice by Category: Volume 2025-2030
Table 93 - Forecast Off-trade Sales of Juice by Category: Value 2025-2030
Table 94 - Forecast Off-trade Sales of Juice by Category: % Volume Growth 2025-2030
Table 95 - Forecast Off-trade Sales of Juice by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

[RTD Coffee in Austria](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

RTD coffee benefits from its convenience

INDUSTRY PERFORMANCE

On-the-go lifestyles drive demand for RTD coffee in Austria
More choice helping to fuel demand

WHAT'S NEXT?

Differentiation expected to drive demand for RTD coffee
The popularity of energy drinks is not expected to impact sales
Concentrates does not present serious competition for RTD coffee

COMPETITIVE LANDSCAPE

Emmi Austria defends its lead in RTD coffee with new product launches
Private label the big winner thanks to differentiated offering and low pricing

CHANNELS

Supermarkets dominate sales
E-commerce continues to make slow progress

CATEGORY DATA

Table 96 - Off-trade Sales of RTD Coffee: Volume 2020-2025
Table 97 - Off-trade Sales of RTD Coffee: Value 2020-2025
Table 98 - Off-trade Sales of RTD Coffee: % Volume Growth 2020-2025
Table 99 - Off-trade Sales of RTD Coffee: % Value Growth 2020-2025
Table 100 - NBO Company Shares of Off-trade RTD Coffee: % Volume 2021-2025

Table 101 - LBN Brand Shares of Off-trade RTD Coffee: % Volume 2022-2025
Table 102 - NBO Company Shares of Off-trade RTD Coffee: % Value 2021-2025
Table 103 - LBN Brand Shares of Off-trade RTD Coffee: % Value 2022-2025
Table 104 - Forecast Off-trade Sales of RTD Coffee: Volume 2025-2030
Table 105 - Forecast Off-trade Sales of RTD Coffee: Value 2025-2030
Table 106 - Forecast Off-trade Sales of RTD Coffee: % Volume Growth 2025-2030
Table 107 - Forecast Off-trade Sales of RTD Coffee: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

[RTD Tea in Austria](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

RTD tea benefits from use of Tetra Pak packaging

INDUSTRY PERFORMANCE

RTD tea benefits from new deposit system and new product launches

Health and convenience inform performances within RTD tea

WHAT'S NEXT?

Positive outlook for RTD tea

Concentrates could present new competition to RTD tea

E-commerce set for further gains but from a small base

COMPETITIVE LANDSCAPE

Leader Rauch drives sales with new flavours and new packaging

Pfanner benefits from its use of Tetra Pak while Teekanne feeds off its healthy image

CHANNELS

Supermarkets remains the most popular distribution channel

Vending and e-commerce see further expansion but from a low base

CATEGORY DATA

Table 108 - Off-trade Sales of RTD Tea by Category: Volume 2020-2025
Table 109 - Off-trade Sales of RTD Tea by Category: Value 2020-2025
Table 110 - Off-trade Sales of RTD Tea by Category: % Volume Growth 2020-2025
Table 111 - Off-trade Sales of RTD Tea by Category: % Value Growth 2020-2025
Table 112 - Leading Flavours for Off-trade RTD Tea: % Volume 2020-2025
Table 113 - NBO Company Shares of Off-trade RTD Tea: % Volume 2021-2025
Table 114 - LBN Brand Shares of Off-trade RTD Tea: % Volume 2022-2025
Table 115 - NBO Company Shares of Off-trade RTD Tea: % Value 2021-2025
Table 116 - LBN Brand Shares of Off-trade RTD Tea: % Value 2022-2025
Table 117 - Forecast Off-trade Sales of RTD Tea by Category: Volume 2025-2030
Table 118 - Forecast Off-trade Sales of RTD Tea by Category: Value 2025-2030
Table 119 - Forecast Off-trade Sales of RTD Tea by Category: % Volume Growth 2025-2030
Table 120 - Forecast Off-trade Sales of RTD Tea by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

[Energy Drinks in Austria](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Energy drinks continues to deliver positive results despite challenges

INDUSTRY PERFORMANCE

Deposit scheme fails to curb the rise of energy drinks in Austria

New product development adds fuel to the category's growth

WHAT'S NEXT?

Steady growth predicted for energy drinks despite rising health consciousness

Powder concentrates present a new threat to energy drinks

Debates on youth protection laws will continue

COMPETITIVE LANDSCAPE

Red Bull uses limited editions to capture attention and retain its lead

Hofer cuts the price of its Flying Power energy drinks to drive volume growth

CHANNELS

Supermarkets benefit from accessibility and reach

Vending and e-commerce tap into the demand for convenience

CATEGORY DATA

Table 121 - Off-trade Sales of Energy Drinks: Volume 2020-2025

Table 122 - Off-trade Sales of Energy Drinks: Value 2020-2025

Table 123 - Off-trade Sales of Energy Drinks: % Volume Growth 2020-2025

Table 124 - Off-trade Sales of Energy Drinks: % Value Growth 2020-2025

Table 125 - NBO Company Shares of Off-trade Energy Drinks: % Volume 2021-2025

Table 126 - LBN Brand Shares of Off-trade Energy Drinks: % Volume 2022-2025

Table 127 - NBO Company Shares of Off-trade Energy Drinks: % Value 2021-2025

Table 128 - LBN Brand Shares of Off-trade Energy Drinks: % Value 2022-2025

Table 129 - Forecast Off-trade Sales of Energy Drinks: Volume 2025-2030

Table 130 - Forecast Off-trade Sales of Energy Drinks: Value 2025-2030

Table 131 - Forecast Off-trade Sales of Energy Drinks: % Volume Growth 2025-2030

Table 132 - Forecast Off-trade Sales of Energy Drinks: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

[Sports Drinks in Austria](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Sales slump as the Prime boom comes to an end

INDUSTRY PERFORMANCE

Sales in sports drinks are levelling off again

Reduced sugar products see growth but remain a niche area

WHAT'S NEXT?

Positive outlook for sports drinks

Sports drinks faces increasing competition from powder concentrates

The competitive environment is set to become increasingly polarised

COMPETITIVE LANDSCAPE

Gatorade remains clear leader

Private label wins share thanks to competitively priced products

CHANNELS

Supermarkets remains the leading distribution channel

E-commerce and vending benefit from their convenience and specialised offering

CATEGORY DATA

Table 133 - Off-trade Sales of Sports Drinks: Volume 2020-2025

Table 134 - Off-trade Sales of Sports Drinks: Value 2020-2025

Table 135 - Off-trade Sales of Sports Drinks: % Volume Growth 2020-2025

Table 136 - Off-trade Sales of Sports Drinks: % Value Growth 2020-2025

Table 137 - NBO Company Shares of Off-trade Sports Drinks: % Volume 2021-2025

Table 138 - LBN Brand Shares of Off-trade Sports Drinks: % Volume 2022-2025

Table 139 - NBO Company Shares of Off-trade Sports Drinks: % Value 2021-2025

Table 140 - LBN Brand Shares of Off-trade Sports Drinks: % Value 2022-2025

Table 141 - Forecast Off-trade Sales of Sports Drinks: Volume 2025-2030

Table 142 - Forecast Off-trade Sales of Sports Drinks: Value 2025-2030

Table 143 - Forecast Off-trade Sales of Sports Drinks: % Volume Growth 2025-2030

Table 144 - Forecast Off-trade Sales of Sports Drinks: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

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-austria/report.