



Euromonitor
International

Carbonates in Germany

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Carbonates in Germany - Category analysis

KEY DATA FINDINGS

2025 DEVELOPMENTS

Overall stagnation despite innovation and bright spots

INDUSTRY PERFORMANCE

Health-centric consumption boosts reduced sugar carbonates

Mixes add dynamism to the category

WHAT'S NEXT?

Innovation and nostalgia or retro options to pique the interest of adult consumers

Functional carbonates feature prebiotics

Combining fun and indulgence with wellbeing

COMPETITIVE LANDSCAPE

Coca-Cola's local emphasis helps to consolidate its leadership of carbonates

Paulaner Brauerei rides the popularity of spezi in Germany

CHANNELS

Grocery retailers remain the main shopping destinations

Retailers upgrade assortments to gain a competitive edge

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[Soft Drinks in Germany - Industry Overview](#)

EXECUTIVE SUMMARY

Health and wellness, price and nostalgia are key factors in consumers' purchasing decisions

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Cost-savings without compromising on quality
Health and wellness increasingly shapes offer and demand
Changing foodservice consumption supports a demand for soft drinks

WHAT'S NEXT?

Sober trend to favour soft drinks consumption
Diversification to cover consumers' needs
Retail to maintain dominance despite recovery of foodservice

COMPETITIVE LANDSCAPE

Aldi is adding premium value to diversify its offer
Paulaner Brauerei shows dynamism through a retro and nostalgia appeal

CHANNELS

Discounters respond to the affordability dynamic while developing higher-quality assortments
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