



# RTD Coffee in Germany

January 2026

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## RTD Coffee in Germany - Category analysis

### KEY DATA FINDINGS

#### 2025 DEVELOPMENTS

Convenience trend drives category growth

#### INDUSTRY PERFORMANCE

High prices limit the appeal of RTD coffee

Premiumisation shapes innovation

#### WHAT'S NEXT?

Iced coffee trend presents opportunities and challenges

Innovation as a growth engine for RTD coffee

Sustainability and transparency to be key factors for both consumers and producers

#### COMPETITIVE LANDSCAPE

Private label gains momentum amidst economic pressures

Starbucks continues to capitalise on unique positioning in RTD coffee

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

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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

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