



Euromonitor
International

Bottled Water in Germany

January 2026

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Bottled Water in Germany - Category analysis

KEY DATA FINDINGS

2025 DEVELOPMENTS

Natural mineral bottled water dominates demand

INDUSTRY PERFORMANCE

Bottled water remains number one for hydration but the competition intensifies

Functional bottled water benefits from the demand for hydration with specific nutritional value

WHAT'S NEXT?

Hydration to continue to stimulate the use of natural mineral bottled water

Bottled water as part of a healthy and sustainable diet

Hotter summers to increase in consumption

COMPETITIVE LANDSCAPE

Private label enjoys consumer trust

Regional brands gain momentum

CHANNELS

Price and convenience favour discounters

Supermarkets leverage price promotions, convenient locations and appealing assortments

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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

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