



Concentrates in Germany

January 2026

Table of Contents

Concentrates in Germany - Category analysis

KEY DATA FINDINGS

2025 DEVELOPMENTS

Consumers seek added value with functional concentrates

INDUSTRY PERFORMANCE

Mixology and sustainability add dynamism

Liquid concentrates is the most dynamic type

WHAT'S NEXT?

Home mixing and sustainability to continue to drive growth

More innovation to come

Hydration in innovative formats

COMPETITIVE LANDSCAPE

Polarisation in terms of economy and premium demand

SodaStream rides the home-mixing trend

CHANNELS

Large modern grocery retailers compete on price

Larger and more diverse assortments support supermarkets' leadership

Concentrates Conversions

Summary 1 - Concentrates Conversion Factors for Ready-to-Drink (RTD) Format

CATEGORY DATA

Table 1 - Off-trade Sales of Concentrates (RTD) by Category: Volume 2020-2025

Table 2 - Off-trade Sales of Concentrates (RTD) by Category: % Volume Growth 2020-2025

Table 3 - Off-trade Sales of Concentrates by Category: Value 2020-2025

Table 4 - Off-trade Sales of Concentrates by Category: % Value Growth 2020-2025

Table 5 - LBN Brand Shares of Off-trade Concentrates (RTD): % Volume 2022-2025

Table 6 - NBO Company Shares of Off-trade Concentrates: % Value 2021-2025

Table 7 - LBN Brand Shares of Off-trade Concentrates: % Value 2022-2025

Table 8 - NBO Company Shares of Off-trade Liquid Concentrates (RTD): % Volume 2021-2025

Table 9 - LBN Brand Shares of Off-trade Liquid Concentrates (RTD): % Volume 2022-2025

Table 10 - NBO Company Shares of Off-trade Powder Concentrates (RTD): % Volume 2021-2025

Table 11 - LBN Brand Shares of Off-trade Powder Concentrates (RTD): % Volume 2022-2025

Table 12 - Forecast Off-trade Sales of Concentrates (RTD) by Category: Volume 2025-2030

Table 13 - Forecast Off-trade Sales of Concentrates (RTD) by Category: % Volume Growth 2025-2030

Table 14 - Forecast Off-trade Sales of Concentrates by Category: Value 2025-2030

Table 15 - Forecast Off-trade Sales of Concentrates by Category: % Value Growth 2025-2030

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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

Strategic locations and wide and varied offers support strong position of supermarkets

MARKET DATA

Table 16 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2020-2025

Table 17 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2020-2025

Table 18 - Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2020-2025

Table 19 - Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2020-2025

Table 20 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: Volume 2025

Table 21 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: % Volume 2025

Table 22 - Off-trade vs On-trade Sales of Soft Drinks by Category: Value 2025

Table 23 - Off-trade vs On-trade Sales of Soft Drinks by Category: % Value 2025

Table 24 - Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2020-2025

Table 25 - Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2020-2025

Table 26 - Off-trade Sales of Soft Drinks by Category: Value 2020-2025

Table 27 - Off-trade Sales of Soft Drinks by Category: % Value Growth 2020-2025

Table 28 - Sales of Soft Drinks by Total Fountain On-trade: Volume 2020-2025

Table 29 - Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2020-2025

Table 30 - NBO Company Shares of Total Soft Drinks (RTD): % Volume 2021-2025

Table 31 - LBN Brand Shares of Total Soft Drinks (RTD): % Volume 2022-2025

Table 32 - NBO Company Shares of On-trade Soft Drinks (RTD): % Volume 2021-2025

Table 33 - LBN Brand Shares of On-trade Soft Drinks (RTD): % Volume 2022-2025

Table 34 - NBO Company Shares of Off-trade Soft Drinks (RTD): % Volume 2021-2025

Table 35 - LBN Brand Shares of Off-trade Soft Drinks (RTD): % Volume 2022-2025

Table 36 - NBO Company Shares of Off-trade Soft Drinks: % Value 2021-2025

Table 37 - LBN Brand Shares of Off-trade Soft Drinks: % Value 2022-2025

Table 38 - Penetration of Private Label in Off-trade Soft Drinks (RTD) by Category: % Volume 2020-2025

Table 39 - Penetration of Private Label in Off-trade Soft Drinks by Category: % Value 2020-2025

Table 40 - Distribution of Off-trade Soft Drinks (as sold) by Format: % Volume 2020-2025

Table 41 - Distribution of Off-trade Soft Drinks (as sold) by Format and Category: % Volume 2025

Table 42 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2025-2030

Table 43 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2025-2030

Table 44 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2025-2030

Table 45 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2025-2030

Table 46 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2025-2030

Table 47 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2025-2030

Table 48 - Forecast Off-trade Sales of Soft Drinks by Category: Value 2025-2030

Table 49 - Forecast Off-trade Sales of Soft Drinks by Category: % Value Growth 2025-2030

Table 50 - Forecast Sales of Soft Drinks by Total Fountain On-trade: Volume 2025-2030

Table 51 - Forecast Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2025-2030

APPENDIX

Fountain sales in Germany

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SOURCES

Summary 2 - Research Sources

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