



Energy Drinks in the Czech Republic

November 2025

Table of Contents

KEY DATA FINDINGS

2025 DEVELOPMENTS

Strong performance supported by youth demand, NPD, and wellness-aligned reformulation

INDUSTRY PERFORMANCE

Volume and value sales expand as youth-driven demand and promotions support category momentum
Reduced sugar energy drinks lead growth as reformulation and flavour innovation accelerate

WHAT'S NEXT?

Category to remain on a growth path but faces uncertainty from regulatory developments
Digital-first marketing, premiumisation and craft-style innovation to shape brand differentiation
Legislative tightening to prompt reformulation and stronger responsible marketing practices

COMPETITIVE LANDSCAPE

Red Bull retains market leadership with strong brand equity and omnichannel visibility
Monster and private label ranges drive competitive dynamism through pricing, NPD and visibility

CHANNELS

Hypermarkets remain the primary channel due to strong promotions and broad assortment
E-commerce and forecourt retail grow rapidly as convenience and impulse needs rise

CATEGORY DATA

- Table 1 - Off-trade Sales of Energy Drinks: Volume 2020-2025
- Table 2 - Off-trade Sales of Energy Drinks: Value 2020-2025
- Table 3 - Off-trade Sales of Energy Drinks: % Volume Growth 2020-2025
- Table 4 - Off-trade Sales of Energy Drinks: % Value Growth 2020-2025
- Table 5 - NBO Company Shares of Off-trade Energy Drinks: % Volume 2021-2025
- Table 6 - LBN Brand Shares of Off-trade Energy Drinks: % Volume 2022-2025
- Table 7 - NBO Company Shares of Off-trade Energy Drinks: % Value 2021-2025
- Table 8 - LBN Brand Shares of Off-trade Energy Drinks: % Value 2022-2025
- Table 9 - Forecast Off-trade Sales of Energy Drinks: Volume 2025-2030
- Table 10 - Forecast Off-trade Sales of Energy Drinks: Value 2025-2030
- Table 11 - Forecast Off-trade Sales of Energy Drinks: % Volume Growth 2025-2030
- Table 12 - Forecast Off-trade Sales of Energy Drinks: % Value Growth 2025-2030

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EXECUTIVE SUMMARY

Economic stabilisation supports a steadying of soft drinks consumption despite continued price sensitivity

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Price sensitivity and discount reliance continue to shape purchasing behaviour
Health and wellness trends sustain premium pockets of growth
Innovation accelerates as brands target younger and health-conscious consumers

WHAT'S NEXT?

Functional innovation and reduced-sugar formulations will underpin forecast growth
Potential legislative changes create uncertainty around sugar and energy drinks

Channel fragmentation will intensify, supported by e-commerce and expanded retail networks

COMPETITIVE LANDSCAPE

Leading companies consolidate their positions through broad portfolios and innovation

Dynamic players benefit from category momentum and strong innovation pipelines

CHANNELS

Hypermarkets remain the leading channel due to assortment breadth and strong pricing

E-commerce and discounters are the most dynamic channels, while convenience reshapes offline shopping patterns

Foodservice vs retail

MARKET DATA

Table 13 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2020-2025

Table 14 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2020-2025

Table 15 - Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2020-2025

Table 16 - Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2020-2025

Table 17 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: Volume 2025

Table 18 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: % Volume 2025

Table 19 - Off-trade vs On-trade Sales of Soft Drinks by Category: Value 2025

Table 20 - Off-trade vs On-trade Sales of Soft Drinks by Category: % Value 2025

Table 21 - Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2020-2025

Table 22 - Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2020-2025

Table 23 - Off-trade Sales of Soft Drinks by Category: Value 2020-2025

Table 24 - Off-trade Sales of Soft Drinks by Category: % Value Growth 2020-2025

Table 25 - Sales of Soft Drinks by Total Fountain On-trade: Volume 2020-2025

Table 26 - Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2020-2025

Table 27 - NBO Company Shares of Total Soft Drinks (RTD): % Volume 2021-2025

Table 28 - LBN Brand Shares of Total Soft Drinks (RTD): % Volume 2022-2025

Table 29 - NBO Company Shares of On-trade Soft Drinks (RTD): % Volume 2021-2025

Table 30 - LBN Brand Shares of On-trade Soft Drinks (RTD): % Volume 2022-2025

Table 31 - NBO Company Shares of Off-trade Soft Drinks (RTD): % Volume 2021-2025

Table 32 - LBN Brand Shares of Off-trade Soft Drinks (RTD): % Volume 2022-2025

Table 33 - NBO Company Shares of Off-trade Soft Drinks: % Value 2021-2025

Table 34 - LBN Brand Shares of Off-trade Soft Drinks: % Value 2022-2025

Table 35 - Penetration of Private Label in Off-trade Soft Drinks (RTD) by Category: % Volume 2020-2025

Table 36 - Penetration of Private Label in Off-trade Soft Drinks by Category: % Value 2020-2025

Table 37 - Distribution of Off-trade Soft Drinks (as sold) by Format: % Volume 2020-2025

Table 38 - Distribution of Off-trade Soft Drinks (as sold) by Format and Category: % Volume 2025

Table 39 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2025-2030

Table 40 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2025-2030

Table 41 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2025-2030

Table 42 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2025-2030

Table 43 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2025-2030

Table 44 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2025-2030

Table 45 - Forecast Off-trade Sales of Soft Drinks by Category: Value 2025-2030

Table 46 - Forecast Off-trade Sales of Soft Drinks by Category: % Value Growth 2025-2030

Table 47 - Forecast Sales of Soft Drinks by Total Fountain On-trade: Volume 2025-2030

Table 48 - Forecast Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2025-2030

APPENDIX

Fountain sales in the Czech Republic

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SOURCES

Summary 1 - Research Sources

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