



Euromonitor  
International

# Soft Drinks in Western Europe

May 2025

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## INTRODUCTION

Key findings

## REGIONAL OVERVIEW

Slow growth for Western Europe in soft drinks  
Modest volume growth expected in the coming years  
Bottled water the biggest soft drinks category in Western Europe  
Bottled water records major losses in Germany over 2019-2024  
Energy drinks recording dynamic growth in Turkey over 2019-2024  
Energy drinks add the most new sales over 2019-2024  
Overall sales decline in Germany and France  
Robust growth being seen in Turkish soft drinks market  
Modern grocery retailers dominate soft drinks distribution in Western Europe  
Small local grocers still lead in Turkey, but discounters are gaining share

## LEADING COMPANIES AND BRANDS

Private label accounts for more than a third of sales in Germany  
Coca-Cola remains a strong leader among the brand owners in Western Europe  
Multinationals and national bottled water players make up the top 10 players  
Coca-Cola continues to head up the brand rankings

## FORECAST PROJECTIONS

Positive, if modest, volume growth expected in the coming years  
Sugar tax due to be implemented in Italy from 2025

## COUNTRY SNAPSHOTS

Austria: Market Context  
Austria : Competitive and Retail Landscape  
Belgium: Market Context  
Belgium : Competitive and Retail Landscape  
Denmark: Market Context  
Denmark : Competitive and Retail Landscape  
Finland: Market Context  
Finland : Competitive and Retail Landscape  
France: Market Context  
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Sweden : Competitive and Retail Landscape

Switzerland: Market Context

Switzerland : Competitive and Retail Landscape

Turkey: Market Context

Turkey : Competitive and Retail Landscape

UK: Market Context

UK : Competitive and Retail Landscape

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