



Euromonitor
International

Hot Drinks in the Czech Republic

November 2025

Table of Contents

EXECUTIVE SUMMARY

Inflation drives value growth while consumers maintain core hot drink habits

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Rising commodity prices and persistent inflation reshape consumer purchasing behaviour

Heightened focus on wellness spurs growth of functional and natural tea varieties

Cost-efficient sustainability gains importance as consumers seek accessible environmental value

WHAT'S NEXT?

Steady forecast growth supported by improving household confidence

Innovation shaped by wellness, sustainability and digital engagement

E-commerce expansion and channel reshaping

COMPETITIVE LANDSCAPE

Leading companies strengthen their positions through innovation and expanded service models

The most dynamic players gain traction through strong brand portfolios and premium positioning

Private label maintains a firm foothold as price sensitivity shapes consumer behaviour

CHANNELS

Hypermarkets remain the leading distribution channel as broad assortments and heavy promotions support demand

E-commerce delivers the fastest growth through expanded assortment, convenience and subscription models

Supermarkets and discounters gain share through convenience, strong private label propositions and increasing promotional intensity

FOODSERVICE VS RETAIL SPLIT

Foodservice demand recovers as colder weather, stabilising incomes and premium coffee culture lift on-trade consumption

Innovation in foodservice formats expands the role of on-the-go beverages and reinforces brand visibility

Retail performance remains stable but faces indirect pressure from recovering on-trade demand

MARKET DATA

Table 1 - Sales of Hot Drinks by Retail vs Foodservice: % Volume Breakdown 2020-2025

Table 2 - Sales of Hot Drinks by Retail vs Foodservice: % Volume Growth 2020-2025

Table 3 - Retail Sales of Hot Drinks by Category: Volume 2020-2025

Table 4 - Retail Sales of Hot Drinks by Category: Value 2020-2025

Table 5 - Retail Sales of Hot Drinks by Category: % Volume Growth 2020-2025

Table 6 - Retail Sales of Hot Drinks by Category: % Value Growth 2020-2025

Table 7 - Foodservice Sales of Hot Drinks by Category: Volume 2020-2025

Table 8 - Foodservice Sales of Hot Drinks by Category: % Volume Growth 2020-2025

Table 9 - Total Sales of Hot Drinks by Category: Total Volume 2020-2025

Table 10 - Total Sales of Hot Drinks by Category: % Total Volume Growth 2020-2025

Table 11 - NBO Company Shares of Hot Drinks: % Retail Value 2021-2025

Table 12 - LBN Brand Shares of Hot Drinks: % Retail Value 2022-2025

Table 13 - Penetration of Private Label in Hot Drinks by Category: % Retail Value 2020-2025

Table 14 - Retail Distribution of Hot Drinks by Format: % Volume 2020-2025

Table 15 - Retail Distribution of Hot Drinks by Format and Category: % Volume 2025

Table 16 - Forecast Sales of Hot Drinks by Retail vs Foodservice: % Volume Breakdown 2025-2030

Table 17 - Forecast Sales of Hot Drinks by Retail vs Foodservice: % Volume Growth 2025-2030

Table 18 - Forecast Retail Sales of Hot Drinks by Category: Volume 2025-2030

Table 19 - Forecast Retail Sales of Hot Drinks by Category: Value 2025-2030

Table 20 - Forecast Retail Sales of Hot Drinks by Category: % Volume Growth 2025-2030

Table 21 - Forecast Retail Sales of Hot Drinks by Category: % Value Growth 2025-2030

Table 22 - Forecast Foodservice Sales of Hot Drinks by Category: Volume 2025-2030

Table 23 - Forecast Foodservice Sales of Hot Drinks by Category: % Volume Growth 2025-2030

Table 24 - Forecast Total Sales of Hot Drinks by Category: Total Volume 2025-2030

Table 25 - Forecast Total Sales of Hot Drinks by Category: % Total Volume Growth 2025-2030

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SOURCES

Summary 1 - Research Sources

Coffee in the Czech Republic

KEY DATA FINDINGS

2025 DEVELOPMENTS

Pricing pressures, selective premiumisation and evolving consumer habits shape category dynamics in 2025

INDUSTRY PERFORMANCE

Inflation-driven price increases shape purchasing behaviour as consumers rely heavily on promotions

Fresh coffee beans remain the most dynamic category as at-home espresso culture strengthens

WHAT'S NEXT?

Moderate retail value growth expected, supported by beans and capsules despite continued price sensitivity

Digitalisation drives the next wave of category development as subscription models and online platforms expand

Sustainability and wellness initiatives grow in relevance as brands adopt more accessible, affordable solutions

COMPETITIVE LANDSCAPE

Tchibo strengthens its leadership through broad category coverage and expanding subscription services

Jacobs Douwe Egberts drives dynamic growth through strong brand equity and heavy marketing investment

CHANNELS

Hypermarkets remain the leading channel but face pressure from supermarkets and discounters

E-commerce accelerates as consumers embrace convenience, subscriptions and wider product choice

CATEGORY DATA

Table 26 - Retail Sales of Coffee by Category: Volume 2020-2025

Table 27 - Retail Sales of Coffee by Category: Value 2020-2025

Table 28 - Retail Sales of Coffee by Category: % Volume Growth 2020-2025

Table 29 - Retail Sales of Coffee by Category: % Value Growth 2020-2025

Table 30 - Retail Sales of Fresh Ground Coffee Pods by Hard vs Soft: % Volume 2020-2025

Table 31 - NBO Company Shares of Coffee: % Retail Value 2021-2025

Table 32 - LBN Brand Shares of Coffee: % Retail Value 2022-2025

Table 33 - Forecast Retail Sales of Coffee by Category: Volume 2025-2030

Table 34 - Forecast Retail Sales of Coffee by Category: Value 2025-2030

Table 35 - Forecast Retail Sales of Coffee by Category: % Volume Growth 2025-2030

Table 36 - Forecast Retail Sales of Coffee by Category: % Value Growth 2025-2030

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Tea in the Czech Republic

KEY DATA FINDINGS

2025 DEVELOPMENTS

Heightened price sensitivity, wellness demand and shifting category preferences shape tea consumption in 2025

INDUSTRY PERFORMANCE

Stabilising demand and strong promotional reliance support modest category recovery
Herbal and loose teas strengthen, while fruit teas face declining relevance

WHAT'S NEXT?

Demand expected to rise as premiumisation returns and functional positioning strengthens
New production technologies unlock functional and sustainability-led innovation
Health, wellness and clean labels expected to dominate consumer decision-making

COMPETITIVE LANDSCAPE

Teekanne strengthens its leadership through broad assortment and functional innovation
Smaller players gain momentum while established brands capture the largest absolute growth

CHANNELS

Hypermarkets remain the main channel but face pressure from expanding supermarkets and discounters
E-commerce grows rapidly through premium assortment, niche offerings and direct-to-consumer models

CATEGORY DATA

Table 37 - Retail Sales of Tea by Category: Volume 2020-2025
Table 38 - Retail Sales of Tea by Category: Value 2020-2025
Table 39 - Retail Sales of Tea by Category: % Volume Growth 2020-2025
Table 40 - Retail Sales of Tea by Category: % Value Growth 2020-2025
Table 41 - NBO Company Shares of Tea: % Retail Value 2021-2025
Table 42 - LBN Brand Shares of Tea: % Retail Value 2022-2025
Table 43 - Forecast Retail Sales of Tea by Category: Volume 2025-2030
Table 44 - Forecast Retail Sales of Tea by Category: Value 2025-2030
Table 45 - Forecast Retail Sales of Tea by Category: % Volume Growth 2025-2030
Table 46 - Forecast Retail Sales of Tea by Category: % Value Growth 2025-2030

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[Other Hot Drinks in the Czech Republic](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Price escalation, shifting household dynamics and evolving wellness expectations reshape category performance

INDUSTRY PERFORMANCE

Price-led growth masks volume softness as consumers shift toward healthier or more affordable alternatives
Chocolate-based flavoured powder drinks grow in value but lose further ground in volume

WHAT'S NEXT?

Moderate value growth expected as prices stabilise and plant-based alternatives expand
Digital convenience and automated fulfilment reshape category accessibility
Wellness-driven reformulation and clean-label demands shape future product innovation

COMPETITIVE LANDSCAPE

Nestlé maintains overwhelming dominance through strong brands, value-focused strategies and broad distribution
Lidl and Nestlé drive the strongest growth through private label expansion and brand power

CHANNELS

Hypermarkets remain the primary channel despite gradual share loss to smaller formats
E-commerce accelerates as consumers embrace online grocery for long-shelf-life beverages

CATEGORY DATA

Table 47 - Retail Sales of Other Hot Drinks by Category: Volume 2020-2025

Table 48 - Retail Sales of Other Hot Drinks by Category: Value 2020-2025

Table 49 - Retail Sales of Other Hot Drinks by Category: % Volume Growth 2020-2025

Table 50 - Retail Sales of Other Hot Drinks by Category: % Value Growth 2020-2025

Table 51 - NBO Company Shares of Other Hot Drinks: % Retail Value 2021-2025

Table 52 - LBN Brand Shares of Other Hot Drinks: % Retail Value 2022-2025

Table 53 - Forecast Retail Sales of Other Hot Drinks by Category: Volume 2025-2030

Table 54 - Forecast Retail Sales of Other Hot Drinks by Category: Value 2025-2030

Table 55 - Forecast Retail Sales of Other Hot Drinks by Category: % Volume Growth 2025-2030

Table 56 - Forecast Retail Sales of Other Hot Drinks by Category: % Value Growth 2025-2030

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