



Concentrates in Germany

January 2026

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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

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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

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