



Soft Drinks in Western Europe

March 2024

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REGIONAL OVERVIEW

Western Europe has the second highest per capita consumption rate for soft drinks

Flatlining volume growth expected in the coming years

Western Europe has the second highest per capita consumption of bottled water

Energy drinks recording dynamic growth in a number of countries

Bottled water records big losses in Germany over 2018-2023

Energy drinks and RTD coffee the most dynamic categories over 2018-2023

In spite of rising prices, the trend towards healthier products continues to be seen

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

Relatively fragmented competitive landscape in Germany, with private label to the fore

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

Near stagnation is expected in off-trade volume terms over 2023-2028

Modest growth expected in real value terms

COUNTRY SNAPSHOTS

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