



Concentrates in the Czech Republic

November 2025

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Concentrates in the Czech Republic - Category analysis

KEY DATA FINDINGS

2025 DEVELOPMENTS

Category continues to decline as consumers prioritise convenience and healthier formats

INDUSTRY PERFORMANCE

Volume sales decline as consumers move away from concentrates towards more modern alternatives

Liquid concentrates remain more dynamic but still experience declining demand

WHAT'S NEXT?

Category expected to continue declining as modern RTD alternatives capture demand

E-commerce and digitalisation create opportunities for flavour expansion and niche offerings

Health and wellness priorities drive sugar reduction and support new product development

COMPETITIVE LANDSCAPE

Kofola maintains leadership through strong brand presence and broad distribution

Linea Nivnice grows dynamically by focusing on liquid concentrates and value positioning

CHANNELS

Hypermarkets remain the dominant channel due to wide assortments and strong promotions

E-commerce sees fastest growth as online grocery adoption expands nationwide

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Soft Drinks in the Czech Republic - Industry Overview

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

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