

Carbonates in Austria

November 2025

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KEY DATA FINDINGS

2025 DEVELOPMENTS

Sales of carbonates negatively impacted by deposit scheme

INDUSTRY PERFORMANCE

New deposit system hits sales of carbonates

Reduced sugar carbonates outperform regular options

WHAT'S NEXT?

Rising health awareness set to limit demand for carbonates

New deposit system might still play a role

E-commerce expected to win share

COMPETITIVE LANDSCAPE

Coca-Cola cements its dominance in carbonates with new product launches

Tonic water/mixers/other bitters a hotbed of activity and competition

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EXECUTIVE SUMMARY

New bottle deposit regulation deals a short-term blow to sales of soft drinks

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Mixed performances seen across soft drinks but overall sales decline in 2025

New bottle deposit scheme has a big impact on the market

On-trade sales continue to recover thanks to improving consumer sentiment

WHAT'S NEXT?

Players likely to respond to deposit scheme with new packaging innovations

Tap water could pose a threat to sales of soft drinks

New product development likely to focus on healthier options

COMPETITIVE LANDSCAPE

Coca-Cola retains the lead but loses share in 2025

Competition heats up with private label making further inroads

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