



Other Hot Drinks in the Czech Republic

November 2025

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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

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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

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