

# Soft Drinks in Switzerland

January 2024

Table of Contents

## EXECUTIVE SUMMARY

Soft drinks in 2023: The big picture

2023 key trends

Competitive landscape

Retailing developments

Foodservice vs retail split

What next for soft drinks?

## MARKET DATA

Table 1 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2018-2023

Table 2 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2018-2023

Table 3 - Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2018-2023

Table 4 - Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2018-2023

Table 5 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: Volume 2023

Table 6 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: % Volume 2023

Table 7 - Off-trade vs On-trade Sales of Soft Drinks by Category: Value 2023

Table 8 - Off-trade vs On-trade Sales of Soft Drinks by Category: % Value 2023

Table 9 - Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2018-2023

Table 10 - Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2018-2023

Table 11 - Off-trade Sales of Soft Drinks by Category: Value 2018-2023

Table 12 - Off-trade Sales of Soft Drinks by Category: % Value Growth 2018-2023

Table 13 - Sales of Soft Drinks by Total Fountain On-trade: Volume 2018-2023

Table 14 - Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2018-2023

Table 15 - NBO Company Shares of Off-trade Soft Drinks (RTD): % Volume 2019-2023

Table 16 - LBN Brand Shares of Off-trade Soft Drinks (RTD): % Volume 2020-2023

Table 17 - NBO Company Shares of Off-trade Soft Drinks: % Value 2019-2023

Table 18 - LBN Brand Shares of Off-trade Soft Drinks: % Value 2020-2023

Table 19 - Penetration of Private Label in Off-trade Soft Drinks (RTD) by Category: % Volume 2018-2023

Table 20 - Penetration of Private Label in Off-trade Soft Drinks by Category: % Value 2018-2023

Table 21 - Distribution of Off-trade Soft Drinks (as sold) by Format: % Volume 2018-2023

Table 22 - Distribution of Off-trade Soft Drinks (as sold) by Format and Category: % Volume 2023

Table 23 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2023-2028

Table 24 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2023-2028

Table 25 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2023-2028

Table 26 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2023-2028

Table 27 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2023-2028

Table 28 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2023-2028

Table 29 - Forecast Off-trade Sales of Soft Drinks by Category: Value 2023-2028

Table 30 - Forecast Off-trade Sales of Soft Drinks by Category: % Value Growth 2023-2028

Table 31 - Forecast Sales of Soft Drinks by Total Fountain On-trade: Volume 2023-2028

Table 32 - Forecast Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2023-2028

## APPENDIX

Fountain sales in Switzerland

## DISCLAIMER

## SOURCES

Summary 1 - Research Sources

## KEY DATA FINDINGS

### 2023 DEVELOPMENTS

Bottled water players face ongoing challenges in 2023  
Functional bottled water spearheads growth  
Migros consolidates its lead

### PROSPECTS AND OPPORTUNITIES

Sustainability credentials will be a major selling point for local and global brands  
Functional bottled water will lead growth  
Price competition will intensify, moving forward

### CATEGORY DATA

Table 33 - Off-trade Sales of Bottled Water by Category: Volume 2018-2023  
Table 34 - Off-trade Sales of Bottled Water by Category: Value 2018-2023  
Table 35 - Off-trade Sales of Bottled Water by Category: % Volume Growth 2018-2023  
Table 36 - Off-trade Sales of Bottled Water by Category: % Value Growth 2018-2023  
Table 37 - NBO Company Shares of Off-trade Bottled Water: % Volume 2019-2023  
Table 38 - LBN Brand Shares of Off-trade Bottled Water: % Volume 2020-2023  
Table 39 - NBO Company Shares of Off-trade Bottled Water: % Value 2019-2023  
Table 40 - LBN Brand Shares of Off-trade Bottled Water: % Value 2020-2023  
Table 41 - Forecast Off-trade Sales of Bottled Water by Category: Volume 2023-2028  
Table 42 - Forecast Off-trade Sales of Bottled Water by Category: Value 2023-2028  
Table 43 - Forecast Off-trade Sales of Bottled Water by Category: % Volume Growth 2023-2028  
Table 44 - Forecast Off-trade Sales of Bottled Water by Category: % Value Growth 2023-2028

## Carbonates in Switzerland

## KEY DATA FINDINGS

### 2023 DEVELOPMENTS

Slowdown in growth for carbonates in 2023  
Manufacturers focus on healthier alternatives in bid to offset maturity  
Cola-Cola maintains its lead amid robust competition from local companies

### PROSPECTS AND OPPORTUNITIES

Reduced-sugar carbonates to lead growth in mature category  
Focus on local sourcing  
Manufacturers to flex their sustainability muscles

### CATEGORY DATA

Table 45 - Off-trade vs On-trade Sales of Carbonates: Volume 2018-2023  
Table 46 - Off-trade vs On-trade Sales of Carbonates: Value 2018-2023  
Table 47 - Off-trade vs On-trade Sales of Carbonates: % Volume Growth 2018-2023  
Table 48 - Off-trade vs On-trade Sales of Carbonates: % Value Growth 2018-2023  
Table 49 - Off-trade Sales of Carbonates by Category: Volume 2018-2023  
Table 50 - Off-trade Sales of Carbonates by Category: Value 2018-2023  
Table 51 - Off-trade Sales of Carbonates by Category: % Volume Growth 2018-2023  
Table 52 - Off-trade Sales of Carbonates by Category: % Value Growth 2018-2023  
Table 53 - Total Sales of Carbonates by Fountain On-trade: Volume 2018-2023  
Table 54 - Total Sales of Carbonates by Fountain On-trade: % Volume Growth 2018-2023  
Table 55 - NBO Company Shares of Off-trade Carbonates: % Volume 2019-2023  
Table 56 - LBN Brand Shares of Off-trade Carbonates: % Volume 2020-2023  
Table 57 - NBO Company Shares of Off-trade Carbonates: % Value 2019-2023

Table 58 - LBN Brand Shares of Off-trade Carbonates: % Value 2020-2023

Table 59 - Forecast Off-trade Sales of Carbonates by Category: Volume 2023-2028

Table 60 - Forecast Off-trade Sales of Carbonates by Category: Value 2023-2028

Table 61 - Forecast Off-trade Sales of Carbonates by Category: % Volume Growth 2023-2028

Table 62 - Forecast Off-trade Sales of Carbonates by Category: % Value Growth 2023-2028

Table 63 - Forecast Total Sales of Carbonates by Fountain On-trade: Volume 2023-2028

Table 64 - Forecast Total Sales of Carbonates by Fountain On-trade: % Volume Growth 2023-2028

## Concentrates in Switzerland

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Slower growth for concentrates in 2023, despite efforts to broaden consumer base

At-home cocktail making trend continues to benefit sales

Private label continues to dominate, while SodaStream shows signs of reaching its peak

#### PROSPECTS AND OPPORTUNITIES

Growth potential remains dependent on demographic

Scope for the development of premium products

Locally sourced, sustainable and organic concentrates are expected to gain prominence

### CATEGORY DATA

Concentrates Conversions

Summary 2 - Concentrates Conversion Factors for Ready-to-Drink (RTD) Format

Table 65 - Off-trade Sales of Concentrates (RTD) by Category: Volume 2018-2023

Table 66 - Off-trade Sales of Concentrates (RTD) by Category: % Volume Growth 2018-2023

Table 67 - Off-trade Sales of Concentrates by Category: Value 2018-2023

Table 68 - Off-trade Sales of Concentrates by Category: % Value Growth 2018-2023

Table 69 - LBN Brand Shares of Off-trade Concentrates (RTD): % Volume 2020-2023

Table 70 - NBO Company Shares of Off-trade Concentrates: % Value 2019-2023

Table 71 - LBN Brand Shares of Off-trade Concentrates: % Value 2020-2023

Table 72 - NBO Company Shares of Off-trade Liquid Concentrates (RTD): % Volume 2019-2023

Table 73 - LBN Brand Shares of Off-trade Liquid Concentrates (RTD): % Volume 2020-2023

Table 74 - NBO Company Shares of Off-trade Powder Concentrates (RTD): % Volume 2019-2023

Table 75 - LBN Brand Shares of Off-trade Powder Concentrates (RTD): % Volume 2020-2023

Table 76 - Forecast Off-trade Sales of Concentrates (RTD) by Category: Volume 2023-2028

Table 77 - Forecast Off-trade Sales of Concentrates (RTD) by Category: % Volume Growth 2023-2028

Table 78 - Forecast Off-trade Sales of Concentrates by Category: Value 2023-2028

Table 79 - Forecast Off-trade Sales of Concentrates by Category: % Value Growth 2023-2028

## Juice in Switzerland

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Limited growth for juice in 2023, as consumers are put off by product's perceived high sugar content

Manufacturers seek to boost sales through development of premium, organic products and expansion of consumption occasions

Private label gains ground

#### PROSPECTS AND OPPORTUNITIES

Maturity of juice will undermine future growth

Sustainability will remain key part of manufacturer strategies

Private label to gain traction

## CATEGORY DATA

Table 80 - Off-trade Sales of Juice by Category: Volume 2018-2023

Table 81 - Off-trade Sales of Juice by Category: Value 2018-2023

Table 82 - Off-trade Sales of Juice by Category: % Volume Growth 2018-2023

Table 83 - Off-trade Sales of Juice by Category: % Value Growth 2018-2023

Table 84 - NBO Company Shares of Off-trade Juice: % Volume 2019-2023

Table 85 - LBN Brand Shares of Off-trade Juice: % Volume 2020-2023

Table 86 - NBO Company Shares of Off-trade Juice: % Value 2019-2023

Table 87 - LBN Brand Shares of Off-trade Juice: % Value 2020-2023

Table 88 - Forecast Off-trade Sales of Juice by Category: Volume 2023-2028

Table 89 - Forecast Off-trade Sales of Juice by Category: Value 2023-2028

Table 90 - Forecast Off-trade Sales of Juice by Category: % Volume Growth 2023-2028

Table 91 - Forecast Off-trade Sales of Juice by Category: % Value Growth 2023-2028

## RTD Coffee in Switzerland

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Sustained growth in 2023, thanks to revival of pre-pandemic patterns of mobility

RTD coffee sees little product innovation

Emmi maintains its strong lead

### PROSPECTS AND OPPORTUNITIES

Slower growth expected, as RTD coffee approaches greater maturity

Scope for development of premium products, in light of growing competition from other types of soft drinks

Dominance of Emmi is likely to deter new entrants

## CATEGORY DATA

Table 92 - Off-trade Sales of RTD Coffee: Volume 2018-2023

Table 93 - Off-trade Sales of RTD Coffee: Value 2018-2023

Table 94 - Off-trade Sales of RTD Coffee: % Volume Growth 2018-2023

Table 95 - Off-trade Sales of RTD Coffee: % Value Growth 2018-2023

Table 96 - NBO Company Shares of Off-trade RTD Coffee: % Volume 2019-2023

Table 97 - LBN Brand Shares of Off-trade RTD Coffee: % Volume 2020-2023

Table 98 - NBO Company Shares of Off-trade RTD Coffee: % Value 2019-2023

Table 99 - LBN Brand Shares of Off-trade RTD Coffee: % Value 2020-2023

Table 100 - Forecast Off-trade Sales of RTD Coffee: Volume 2023-2028

Table 101 - Forecast Off-trade Sales of RTD Coffee: Value 2023-2028

Table 102 - Forecast Off-trade Sales of RTD Coffee: % Volume Growth 2023-2028

Table 103 - Forecast Off-trade Sales of RTD Coffee: % Value Growth 2023-2028

## RTD Tea in Switzerland

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

RTD tea benefits from healthy image and return to on-the-go consumption

Mate-based varieties gain traction

Migros holds sway, thanks to competitive pricing strategy

### PROSPECTS AND OPPORTUNITIES

RTD tea still has much scope for growth

Increase in competition from other types of soft drinks

Locally sourced and functional ingredients will be key features of new product launches

## CATEGORY DATA

Table 104 - Off-trade Sales of RTD Tea by Category: Volume 2018-2023

Table 105 - Off-trade Sales of RTD Tea by Category: Value 2018-2023

Table 106 - Off-trade Sales of RTD Tea by Category: % Volume Growth 2018-2023

Table 107 - Off-trade Sales of RTD Tea by Category: % Value Growth 2018-2023

Table 108 - Leading Flavours for Off-trade RTD Tea: % Volume 2018-2023

Table 109 - NBO Company Shares of Off-trade RTD Tea: % Volume 2019-2023

Table 110 - LBN Brand Shares of Off-trade RTD Tea: % Volume 2020-2023

Table 111 - NBO Company Shares of Off-trade RTD Tea: % Value 2019-2023

Table 112 - LBN Brand Shares of Off-trade RTD Tea: % Value 2020-2023

Table 113 - Forecast Off-trade Sales of RTD Tea by Category: Volume 2023-2028

Table 114 - Forecast Off-trade Sales of RTD Tea by Category: Value 2023-2028

Table 115 - Forecast Off-trade Sales of RTD Tea by Category: % Volume Growth 2023-2028

Table 116 - Forecast Off-trade Sales of RTD Tea by Category: % Value Growth 2023-2028

## Energy Drinks in Switzerland

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Positive growth in 2023, with reduced sugar varieties leading the way

Natural mate-based formulations make further strides

Red Bull heads up concentrated manufacturer landscape

### PROSPECTS AND OPPORTUNITIES

Slower growth expected, in light of category's maturity

Players may seek out more partnerships with celebrities in order to broaden their presence amongst younger audiences

Eco-friendly products will gain traction

## CATEGORY DATA

Table 117 - Off-trade Sales of Energy Drinks: Volume 2018-2023

Table 118 - Off-trade Sales of Energy Drinks: Value 2018-2023

Table 119 - Off-trade Sales of Energy Drinks: % Volume Growth 2018-2023

Table 120 - Off-trade Sales of Energy Drinks: % Value Growth 2018-2023

Table 121 - NBO Company Shares of Off-trade Energy Drinks: % Volume 2019-2023

Table 122 - LBN Brand Shares of Off-trade Energy Drinks: % Volume 2020-2023

Table 123 - NBO Company Shares of Off-trade Energy Drinks: % Value 2019-2023

Table 124 - LBN Brand Shares of Off-trade Energy Drinks: % Value 2020-2023

Table 125 - Forecast Off-trade Sales of Energy Drinks: Volume 2023-2028

Table 126 - Forecast Off-trade Sales of Energy Drinks: Value 2023-2028

Table 127 - Forecast Off-trade Sales of Energy Drinks: % Volume Growth 2023-2028

Table 128 - Forecast Off-trade Sales of Energy Drinks: % Value Growth 2023-2028

## Sports Drinks in Switzerland

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Modest growth for sports drinks in 2023, thanks to return of outdoor activities

Lack of innovation hinders sales

Dominance of global players hinders presence of private label

### PROSPECTS AND OPPORTUNITIES

Growth will be dependent upon the expansion of the consumer base  
Competition will heat up, with mate emerging as popular energy-boosting ingredient  
Sports players to go head-to-head with energy drinks

#### CATEGORY DATA

- Table 129 - Off-trade Sales of Sports Drinks: Volume 2018-2023
- Table 130 - Off-trade Sales of Sports Drinks: Value 2018-2023
- Table 131 - Off-trade Sales of Sports Drinks: % Volume Growth 2018-2023
- Table 132 - Off-trade Sales of Sports Drinks: % Value Growth 2018-2023
- Table 133 - NBO Company Shares of Off-trade Sports Drinks: % Volume 2019-2023
- Table 134 - LBN Brand Shares of Off-trade Sports Drinks: % Volume 2020-2023
- Table 135 - NBO Company Shares of Off-trade Sports Drinks: % Value 2019-2023
- Table 136 - LBN Brand Shares of Off-trade Sports Drinks: % Value 2020-2023
- Table 137 - Forecast Off-trade Sales of Sports Drinks: Volume 2023-2028
- Table 138 - Forecast Off-trade Sales of Sports Drinks: Value 2023-2028
- Table 139 - Forecast Off-trade Sales of Sports Drinks: % Volume Growth 2023-2028
- Table 140 - Forecast Off-trade Sales of Sports Drinks: % Value Growth 2023-2028

## About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link [www.euromonitor.com/soft-drinks-in-switzerland/report](http://www.euromonitor.com/soft-drinks-in-switzerland/report).