



Soft Drinks in Spain

November 2025

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EXECUTIVE SUMMARY

Health, affordability and retail diversification shape soft drinks performance in Spain

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Health positioning boosts sales in soft drinks in Spain

Channel diversity and affordability have key impact

Health and wellness trends push premiumisation

WHAT'S NEXT?

Further rises anticipated for volume sales in soft drinks

Private label set to expand

Innovation will lead to greater fragmentation in competitive landscape

COMPETITIVE LANDSCAPE

Mercadona maintains overall leadership while Coca-Cola sees success through iconic brands and persistent innovation

Nestlé rises through popular brands in bottled water

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Supermarkets leads retail distribution while e-commerce sees greatest expansion

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WHAT'S NEXT?

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COMPETITIVE LANDSCAPE

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WHAT'S NEXT?

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COMPETITIVE LANDSCAPE

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INDUSTRY PERFORMANCE

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