



# Coffee in Spain

November 2025

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## Coffee in Spain - Category analysis

### KEY DATA FINDINGS

#### 2025 DEVELOPMENTS

Fresh beans, premiumisation and digital channels sustain growth for coffee in Spain

#### INDUSTRY PERFORMANCE

Coffee remains resilient despite cost-of-living crisis

Coffee pods suffers amid waning demand

#### WHAT'S NEXT?

Continued growth forecast for fresh coffee beans and premium segments

Acceleration of e-commerce as a key distribution channel

Rise of RTD coffee and functional variants could pose a challenge to coffee category

#### COMPETITIVE LANDSCAPE

Nestlé maintains overall leadership as Starbucks focuses on iced offerings

Polarised demand supports premiumisation and private label expansion

#### CHANNELS

Online distribution benefits from subscription services

Foodservice rises in response to demand for quality products and experiences

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High prices, polarised demand and digitalisation shape hot drinks in Spain

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2025 sees rising value sales as prices remain high

Functional positioning gains ground in tea as e-commerce expands

Sustainability remains key concern while technology drives development in foodservice

#### WHAT'S NEXT?

Coffee and tea will fare better than other hot drinks over the forecast period

Premiumisation and sustainability trends continue to inform innovation

Supermarkets channel to maintain distribution lead

## COMPETITIVE LANDSCAPE

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Tea sees fastest value growth among hot drinks categories

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