



**Euromonitor  
International**

# Hot Drinks in Spain

November 2025

Table of Contents

### EXECUTIVE SUMMARY

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

### KEY DATA FINDINGS

### INDUSTRY PERFORMANCE

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

Nestlé leads hot drinks through portfolio of popular brands

Tea sees fastest value growth among hot drinks categories

### CHANNELS

Supermarkets dominates distribution as e-commerce records greatest expansion

Foodservice rises faster than retail in 2025

### MARKET DATA

Table 1 - Sales of Hot Drinks by Retail vs Foodservice: % Volume Breakdown 2020-2025

Table 2 - Sales of Hot Drinks by Retail vs Foodservice: % Volume Growth 2020-2025

Table 3 - Retail Sales of Hot Drinks by Category: Volume 2020-2025

Table 4 - Retail Sales of Hot Drinks by Category: Value 2020-2025

Table 5 - Retail Sales of Hot Drinks by Category: % Volume Growth 2020-2025

Table 6 - Retail Sales of Hot Drinks by Category: % Value Growth 2020-2025

Table 7 - Foodservice Sales of Hot Drinks by Category: Volume 2020-2025

Table 8 - Foodservice Sales of Hot Drinks by Category: % Volume Growth 2020-2025

Table 9 - Total Sales of Hot Drinks by Category: Total Volume 2020-2025

Table 10 - Total Sales of Hot Drinks by Category: % Total Volume Growth 2020-2025

Table 11 - NBO Company Shares of Hot Drinks: % Retail Value 2021-2025

Table 12 - LBN Brand Shares of Hot Drinks: % Retail Value 2022-2025

Table 13 - Penetration of Private Label in Hot Drinks by Category: % Retail Value 2020-2025

Table 14 - Retail Distribution of Hot Drinks by Format: % Volume 2020-2025

Table 15 - Retail Distribution of Hot Drinks by Format and Category: % Volume 2025

Table 16 - Forecast Sales of Hot Drinks by Retail vs Foodservice: % Volume Breakdown 2025-2030

Table 17 - Forecast Sales of Hot Drinks by Retail vs Foodservice: % Volume Growth 2025-2030

Table 18 - Forecast Retail Sales of Hot Drinks by Category: Volume 2025-2030

Table 19 - Forecast Retail Sales of Hot Drinks by Category: Value 2025-2030

Table 20 - Forecast Retail Sales of Hot Drinks by Category: % Volume Growth 2025-2030

Table 21 - Forecast Retail Sales of Hot Drinks by Category: % Value Growth 2025-2030

Table 22 - Forecast Foodservice Sales of Hot Drinks by Category: Volume 2025-2030

Table 23 - Forecast Foodservice Sales of Hot Drinks by Category: % Volume Growth 2025-2030

Table 24 - Forecast Total Sales of Hot Drinks by Category: Total Volume 2025-2030

Table 25 - Forecast Total Sales of Hot Drinks by Category: % Total Volume Growth 2025-2030

### COUNTRY REPORTS DISCLAIMER

## SOURCES

Summary 1 - Research Sources

[Coffee in Spain](#)

## 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

### CATEGORY DATA

Table 26 - Retail Sales of Coffee by Category: Volume 2020-2025

Table 27 - Retail Sales of Coffee by Category: Value 2020-2025

Table 28 - Retail Sales of Coffee by Category: % Volume Growth 2020-2025

Table 29 - Retail Sales of Coffee by Category: % Value Growth 2020-2025

Table 30 - Retail Sales of Fresh Ground Coffee Pods by Hard vs Soft: % Volume 2020-2025

Table 31 - NBO Company Shares of Coffee: % Retail Value 2021-2025

Table 32 - LBN Brand Shares of Coffee: % Retail Value 2022-2025

Table 33 - Forecast Retail Sales of Coffee by Category: Volume 2025-2030

Table 34 - Forecast Retail Sales of Coffee by Category: Value 2025-2030

Table 35 - Forecast Retail Sales of Coffee by Category: % Volume Growth 2025-2030

Table 36 - Forecast Retail Sales of Coffee by Category: % Value Growth 2025-2030

### COUNTRY REPORTS DISCLAIMER

[Tea in Spain](#)

## KEY DATA FINDINGS

### 2025 DEVELOPMENTS

Tea in Spain sees modest value growth as functional fruit/herbal infusions offset declines in black tea

### INDUSTRY PERFORMANCE

Value sales rise for tea in 2025, driven primarily by fruit/herbal tea

Coffee continues to present competitive threat, though healthy properties support sales for tea

### WHAT'S NEXT?

Growth set to come from functional segments

E-commerce will see further expansion over the forecast period  
Traditional tea category will see intensified competition from RTD tea

## COMPETITIVE LANDSCAPE

Mercadona leads amid polarising preferences  
Increased focus on sustainability and healthy positioning

## CHANNELS

Supermarkets leads distribution as discounters gains ground  
E-commerce sees expansion driven by convenience and broad assortment

## CATEGORY DATA

Table 37 - Retail Sales of Tea by Category: Volume 2020-2025  
Table 38 - Retail Sales of Tea by Category: Value 2020-2025  
Table 39 - Retail Sales of Tea by Category: % Volume Growth 2020-2025  
Table 40 - Retail Sales of Tea by Category: % Value Growth 2020-2025  
Table 41 - NBO Company Shares of Tea: % Retail Value 2021-2025  
Table 42 - LBN Brand Shares of Tea: % Retail Value 2022-2025  
Table 43 - Forecast Retail Sales of Tea by Category: Volume 2025-2030  
Table 44 - Forecast Retail Sales of Tea by Category: Value 2025-2030  
Table 45 - Forecast Retail Sales of Tea by Category: % Volume Growth 2025-2030  
Table 46 - Forecast Retail Sales of Tea by Category: % Value Growth 2025-2030

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[Other Hot Drinks in Spain](#)

## KEY DATA FINDINGS

### 2025 DEVELOPMENTS

Value growth under pressure as health trends and cocoa costs weigh on other hot drinks in Spain

## INDUSTRY PERFORMANCE

As value sales rise, volumes continue to decline for other hot drinks in Spain  
Chocolate variants fare better than the rest though still struggle

## WHAT'S NEXT?

Other hot drinks set to see further decline over forecast period  
Digital and technological category advancements aim to drive engagement with younger consumers  
The long-term impact of health and wellness trends on other hot drinks

## COMPETITIVE LANDSCAPE

Nestlé and Idilia Foods remain overall leaders  
Cold chocolate-based alternatives lure consumers away from other hot drinks

## CHANNELS

Supermarkets remain the go-to distribution channel  
Vending soars ahead from a tiny base in 2025

## CATEGORY DATA

Table 47 - Retail Sales of Other Hot Drinks by Category: Volume 2020-2025  
Table 48 - Retail Sales of Other Hot Drinks by Category: Value 2020-2025  
Table 49 - Retail Sales of Other Hot Drinks by Category: % Volume Growth 2020-2025  
Table 50 - Retail Sales of Other Hot Drinks by Category: % Value Growth 2020-2025  
Table 51 - NBO Company Shares of Other Hot Drinks: % Retail Value 2021-2025

Table 52 - LBN Brand Shares of Other Hot Drinks: % Retail Value 2022-2025

Table 53 - Forecast Retail Sales of Other Hot Drinks by Category: Volume 2025-2030

Table 54 - Forecast Retail Sales of Other Hot Drinks by Category: Value 2025-2030

Table 55 - Forecast Retail Sales of Other Hot Drinks by Category: % Volume Growth 2025-2030

Table 56 - Forecast Retail Sales of Other Hot Drinks by Category: % Value Growth 2025-2030

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