



Tea in Spain

November 2025

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Tea in Spain - Category analysis

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

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Hot Drinks in Spain - Industry Overview

EXECUTIVE SUMMARY

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

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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

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Tea sees fastest value growth among hot drinks categories

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