



Soft Drinks in Portugal

December 2025

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Soft Drinks in Portugal

EXECUTIVE SUMMARY

Soft drinks growing despite challenges

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INDUSTRY PERFORMANCE

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Increasing focus on health

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Local production becoming important

Sustainability to remain a strong trend, while AI will drive new developments

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WHAT'S NEXT?

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Technological development in production and logistics will lead to better efficiency and cost reduction

Sustainability through new packaging developments is a constant focus of the industry

COMPETITIVE LANDSCAPE

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Health and wellness trend hits carbonates

INDUSTRY PERFORMANCE

Carbonates sees health concerns dampen sales

Tonic water/mixers/other bitters sees significant growth

WHAT'S NEXT?

Carbonates consumption to grow, dominated by healthier solutions

Innovation and new experiences will be essential to boost the category

The new SDR scheme is expected to have an impact on consumption

COMPETITIVE LANDSCAPE

Brand awareness, investment in communication and consumer activities, and innovation boost the category

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Powder concentrates struggling to gain new consumers

WHAT'S NEXT?

Concentrates set to see volumes stagnate

No major developments expected for concentrates over the forecast period

The new SDR legislation is expected to have a negative impact on sales

COMPETITIVE LANDSCAPE

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Private label has significant presence

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[Juice in Portugal](#)

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Budget consciousness and upmarket demand hit volume sales

INDUSTRY PERFORMANCE

Rising prices have a negative impact on consumption

Juice drinks (up to 24% juice) proves most resilient in volume terms

WHAT'S NEXT?

Juice consumption to be boosted by growing concern for health and wellbeing

Technological and digital advances to improve efficiency

Sustainability remains key for the industry

COMPETITIVE LANDSCAPE

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[RTD Coffee in Portugal](#)

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INDUSTRY PERFORMANCE

Category sales are growing, driven by convenience

Gaining presence on shelves

WHAT'S NEXT?

Focus on convenience and functionality will be key drivers of the category

Innovation and increased per capita consumption are fundamental for the development of the category.

Sustainable new packaging will be important for attracting new consumers

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[RTD Tea in Portugal](#)

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INDUSTRY PERFORMANCE

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Carbonated RTD tea and kombucha seeing growth driven by interest in gut health

WHAT'S NEXT?

Innovation and concern for health boost the category

Functional products are increasingly the key driver of the category

New brands enter the category

COMPETITIVE LANDSCAPE

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[Energy Drinks in Portugal](#)

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2025 DEVELOPMENTS

Limited editions boost consumer interest

INDUSTRY PERFORMANCE

Energy drinks continues to grow at a good pace

Reduced sugar options see strongest growth

WHAT'S NEXT?

Per capita consumption of energy drinks is expected to continue to grow throughout the forecast period

Innovation still an essential pillar in the development of the category

Sustainability key to new packaging developments

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Red Bull utilises innovation and strong consumer engagement

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Gyms and social media promote benefits of sports drinks

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Positive developments focused on innovation

Clear legislation is essential for category evolution

Brand information and engagement with consumers key for the development of the category and brands

COMPETITIVE LANDSCAPE

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