



# Concentrates in Italy

December 2025

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## Concentrates in Italy - Category analysis

### KEY DATA FINDINGS

#### 2025 DEVELOPMENTS

Innovation drives growth for powder concentrates amidst decline for liquid

#### INDUSTRY PERFORMANCE

Liquid concentrates face health scrutiny and generational gap

Innovation fuels growth for powder concentrates

#### WHAT'S NEXT?

Divergent fortunes expected for liquid and powder concentrates

Beyond traditional concentrates, new technologies and competitors set to emerge

Eco-conscious choices could drive value for concentrates

#### COMPETITIVE LANDSCAPE

Ristora leads powder concentrates, while traditional brand Fabbri sees share decline

waterdrop Microdrink GmbH reshapes the concentrates landscape

#### CHANNELS

Planned purchases and new brands fuel lead of supermarkets in concentrates

Social media and busy lifestyles fuel growth for retail e-commerce in concentrates

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## Soft Drinks in Italy - Industry Overview

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Soft drinks sees modest growth amidst health trends, channel shifts, and price rises

### KEY DATA FINDINGS

#### INDUSTRY PERFORMANCE

Mixed fortunes, with health trends and competition reshaping soft drinks

Demand for reduced sugar products surges despite sugar tax postponement

Functionality and wellness drive innovation in soft drinks, reshaping the dynamics

## WHAT NEXT?

Energy drinks and functional bottled water to drive modest growth

Italian sugar tax set to reshape soft drinks, driving a shift to reduced sugar options

Functionality and premiumisation set to dominate soft drinks trends

## COMPETITIVE LANDSCAPE

San Benedetto leads in volume terms, while Coca-Cola leads value sales

waterdrop revitalises powder concentrates with dynamic innovation and health focus

## CHANNELS

Supermarkets retains its lead in soft drinks through promotions and product range

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