



**Euromonitor
International**

Concentrates in Spain

November 2025

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Concentrates in Spain - Category analysis

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2025 DEVELOPMENTS

Concentrates continues to decline as competition erodes relevance in 2025

INDUSTRY PERFORMANCE

Demand for concentrates continues to decline in Spain in 2025

Liquid concentrates tries to find new consumption occasions amid strong competition

WHAT'S NEXT?

Concentrates will remain on negative trajectory during forecast period

Health-focused innovation offers some hope

Concentrates suffers in face of cross-category competition

COMPETITIVE LANDSCAPE

Isotar brand maintains overall leadership in 2025, while private label fails to develop

Lack of reduced sugar variants undermines growth potential

Supermarkets dominates distribution

E-commerce continues to expand

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INDUSTRY PERFORMANCE

Health positioning boosts sales in soft drinks in Spain

Channel diversity and affordability have key impact

Health and wellness trends push premiumisation

WHAT'S NEXT?

Further rises anticipated for volume sales in soft drinks

Private label set to expand

Innovation will lead to greater fragmentation in competitive landscape

COMPETITIVE LANDSCAPE

Mercadona maintains overall leadership while Coca-Cola sees success through iconic brands and persistent innovation

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