



# Carbonates in Portugal

December 2025

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## Carbonates in Portugal - Category analysis

### KEY DATA FINDINGS

#### 2025 DEVELOPMENTS

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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Supermarkets remains the preferred distribution channel in Portugal

E-commerce sees further expansion

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## Soft Drinks in Portugal - Industry Overview

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## INDUSTRY PERFORMANCE

Pressure on household budgets

Increasing focus on health

## WHAT'S NEXT?

Further growth anticipated

Local production becoming important

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

## COMPETITIVE LANDSCAPE

Leading player offers broad brand portfolio

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