



# Sports Drinks in Spain

November 2025

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## Sports Drinks in Spain - Category analysis

### KEY DATA FINDINGS

#### 2025 DEVELOPMENTS

Sports drinks delivers strong gains as reduced sugar and functional hydration drive demand

#### INDUSTRY PERFORMANCE

Sports drinks continues positive trajectory in 2025

Health positioning bolsters growth

#### WHAT'S NEXT?

Reduced sugar sports drinks with added benefits to see increased demand

Digital and technological category advancements

Sustainability and environment at the forefront

#### COMPETITIVE LANDSCAPE

Brand loyalty remains strong in sports drinks

Innovative offerings support expansion

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Supermarkets leads with branded offerings proving more popular than private label alternatives

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Health, affordability and retail diversification shape soft drinks performance in Spain

### KEY DATA FINDINGS

#### 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

Nestlé rises through popular brands in bottled water

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Supermarkets leads retail distribution while e-commerce sees greatest expansion

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