



Soft Drinks in Portugal

December 2025

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EXECUTIVE SUMMARY

Soft drinks growing despite challenges

KEY DATA FINDINGS

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

Red Bull expanding rapidly, while new brands target areas with strong growth potential

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Supermarkets offers convenience and competitive pricing

Digital technology playing growing role in retail

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Bottled water attracting health-conscious consumers

INDUSTRY PERFORMANCE

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Consumers turning to sparkling flavoured bottled water rather than carbonates

WHAT'S NEXT?

Concern for health and wellbeing will lead to an increase in the consumption of bottled water
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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Out of line with the times

INDUSTRY PERFORMANCE

Consumption is decreasing due to greater concern for health

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

Sunquick benefits from high level of brand awareness

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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RTD coffee can build on strong tradition of coffee consumption

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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Nestlé performing well

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RTD Tea in Portugal

KEY DATA FINDINGS

2025 DEVELOPMENTS

RTD tea sluggish, but with potential

INDUSTRY PERFORMANCE

RTD tea brands looking to healthier versions and innovation
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

Private label dominates category
Unilever reinforces Lipton's position through innovation

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Energy Drinks in Portugal

KEY DATA FINDINGS

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

COMPETITIVE LANDSCAPE

Leading brand builds on pioneering role in category development

Red Bull utilises innovation and strong consumer engagement

CHANNELS

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[Sports Drinks in Portugal](#)

KEY DATA FINDINGS

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Sports drinks riding growing interest in exercise

INDUSTRY PERFORMANCE

Sports drinks continues to grow as consumers become more informed about product benefits

Gyms and social media promote benefits of sports drinks

WHAT'S NEXT?

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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