



**Euromonitor
International**

Concentrates in Spain

November 2025

Table of Contents

Concentrates in Spain - Category analysis

KEY DATA FINDINGS

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

Concentrates Conversions

Summary 1 - Concentrates Conversion Factors for Ready-to-Drink (RTD) Format

CATEGORY DATA

Table 1 - Off-trade Sales of Concentrates (RTD) by Category: Volume 2020-2025

Table 2 - Off-trade Sales of Concentrates (RTD) by Category: % Volume Growth 2020-2025

Table 3 - Off-trade Sales of Concentrates by Category: Value 2020-2025

Table 4 - Off-trade Sales of Concentrates by Category: % Value Growth 2020-2025

Table 5 - LBN Brand Shares of Off-trade Concentrates (RTD): % Volume 2022-2025

Table 6 - NBO Company Shares of Off-trade Concentrates: % Value 2021-2025

Table 7 - LBN Brand Shares of Off-trade Concentrates: % Value 2022-2025

Table 8 - NBO Company Shares of Off-trade Liquid Concentrates (RTD): % Volume 2021-2025

Table 9 - LBN Brand Shares of Off-trade Liquid Concentrates (RTD): % Volume 2022-2025

Table 10 - NBO Company Shares of Off-trade Powder Concentrates (RTD): % Volume 2021-2025

Table 11 - LBN Brand Shares of Off-trade Powder Concentrates (RTD): % Volume 2022-2025

Table 12 - Forecast Off-trade Sales of Concentrates (RTD) by Category: Volume 2025-2030

Table 13 - Forecast Off-trade Sales of Concentrates (RTD) by Category: % Volume Growth 2025-2030

Table 14 - Forecast Off-trade Sales of Concentrates by Category: Value 2025-2030

Table 15 - Forecast Off-trade Sales of Concentrates by Category: % Value Growth 2025-2030

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Soft Drinks in Spain - Industry Overview

EXECUTIVE SUMMARY

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

CHANNELS

Supermarkets leads retail distribution while e-commerce sees greatest expansion

Private label drives retail sales as foodservice benefits from on-the-go consumption trend

MARKET DATA

Table 16 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2020-2025

Table 17 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2020-2025

Table 18 - Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2020-2025

Table 19 - Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2020-2025

Table 20 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: Volume 2025

Table 21 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: % Volume 2025

Table 22 - Off-trade vs On-trade Sales of Soft Drinks by Category: Value 2025

Table 23 - Off-trade vs On-trade Sales of Soft Drinks by Category: % Value 2025

Table 24 - Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2020-2025

Table 25 - Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2020-2025

Table 26 - Off-trade Sales of Soft Drinks by Category: Value 2020-2025

Table 27 - Off-trade Sales of Soft Drinks by Category: % Value Growth 2020-2025

Table 28 - Sales of Soft Drinks by Total Fountain On-trade: Volume 2020-2025

Table 29 - Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2020-2025

Table 30 - NBO Company Shares of Total Soft Drinks (RTD): % Volume 2021-2025

Table 31 - LBN Brand Shares of Total Soft Drinks (RTD): % Volume 2022-2025

Table 32 - NBO Company Shares of On-trade Soft Drinks (RTD): % Volume 2021-2025

Table 33 - LBN Brand Shares of On-trade Soft Drinks (RTD): % Volume 2022-2025

Table 34 - NBO Company Shares of Off-trade Soft Drinks (RTD): % Volume 2021-2025

Table 35 - LBN Brand Shares of Off-trade Soft Drinks (RTD): % Volume 2022-2025

Table 36 - NBO Company Shares of Off-trade Soft Drinks: % Value 2021-2025

Table 37 - LBN Brand Shares of Off-trade Soft Drinks: % Value 2022-2025

Table 38 - Penetration of Private Label in Off-trade Soft Drinks (RTD) by Category: % Volume 2020-2025

Table 39 - Penetration of Private Label in Off-trade Soft Drinks by Category: % Value 2020-2025

Table 40 - Distribution of Off-trade Soft Drinks (as sold) by Format: % Volume 2020-2025

Table 41 - Distribution of Off-trade Soft Drinks (as sold) by Format and Category: % Volume 2025

Table 42 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2025-2030

Table 43 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2025-2030

Table 44 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2025-2030

Table 45 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2025-2030

Table 46 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2025-2030

Table 47 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2025-2030

Table 48 - Forecast Off-trade Sales of Soft Drinks by Category: Value 2025-2030

Table 49 - Forecast Off-trade Sales of Soft Drinks by Category: % Value Growth 2025-2030

Table 50 - Forecast Sales of Soft Drinks by Total Fountain On-trade: Volume 2025-2030

Table 51 - Forecast Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2025-2030

APPENDIX

Fountain sales in Spain

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