



**Euromonitor
International**

Sports Drinks in Italy

December 2025

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KEY DATA FINDINGS

2025 DEVELOPMENTS

Premiumisation masks volume decline in sports drinks amidst health concerns

INDUSTRY PERFORMANCE

Prime Hydration drives value growth while health concerns and competition impact volumes

Sports drinks manufacturers prepare for sugar tax with zero sugar products

WHAT'S NEXT?

Value growth to slow as competition intensifies and Prime Hydration's impact fades

High protein claims likely to emerge to revitalise sports drinks

COMPETITIVE LANDSCAPE

San Benedetto and Coca-Cola gain share as Gatorade falters

Prime Hydration's strategic marketing and distribution drive share growth in Italy

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Supermarkets retains its distribution lead in sports drinks despite shrinking shelf space and volume decline

Vending and retail e-commerce outperform in a challenging environment

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Soft Drinks in Italy - Industry Overview

EXECUTIVE SUMMARY

Soft drinks sees modest growth amidst health trends, channel shifts, and price rises

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INDUSTRY PERFORMANCE

Mixed fortunes, with health trends and competition reshaping soft drinks

Demand for reduced sugar products surges despite sugar tax postponement

Functionality and wellness drive innovation in soft drinks, reshaping the dynamics

WHAT NEXT?

Energy drinks and functional bottled water to drive modest growth

Italian sugar tax set to reshape soft drinks, driving a shift to reduced sugar options

Functionality and premiumisation set to dominate soft drinks trends

COMPETITIVE LANDSCAPE

San Benedetto leads in volume terms, while Coca-Cola leads value sales
waterdrop revitalises powder concentrates with dynamic innovation and health focus

CHANNELS

Supermarkets retains its lead in soft drinks through promotions and product range
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