



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

CHANNELS

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

Vending gains ground in sports drinks

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EXECUTIVE SUMMARY

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

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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

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

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