



Carbonates in Spain

November 2025

Table of Contents

KEY DATA FINDINGS

2025 DEVELOPMENTS

Reduced sugar variants underpin resilience in carbonates

INDUSTRY PERFORMANCE

Reduced sugar remains bright spot amid widespread declines in 2025

Healthier variants drive overall growth for carbonates

WHAT'S NEXT?

Reduced sugar and non-sugar variants set to do well despite stagnation

AI-Driven transformation to boost efficiency

Sustainability remains key focus point

COMPETITIVE LANDSCAPE

Coca-Cola leads, competitors respond

Prebiotic and flavour innovations invigorate category

CHANNELS

Supermarkets leads, with discounters following

E-commerce sees further rapid expansion

CATEGORY DATA

Table 1 - Off-trade vs On-trade Sales of Carbonates: Volume 2020-2025
Table 2 - Off-trade vs On-trade Sales of Carbonates: Value 2020-2025
Table 3 - Off-trade vs On-trade Sales of Carbonates: % Volume Growth 2020-2025
Table 4 - Off-trade vs On-trade Sales of Carbonates: % Value Growth 2020-2025
Table 5 - Off-trade Sales of Carbonates by Category: Volume 2020-2025
Table 6 - Off-trade Sales of Carbonates by Category: Value 2020-2025
Table 7 - Off-trade Sales of Carbonates by Category: % Volume Growth 2020-2025
Table 8 - Off-trade Sales of Carbonates by Category: % Value Growth 2020-2025
Table 9 - Total Sales of Carbonates by Fountain On-trade: Volume 2020-2025
Table 10 - Total Sales of Carbonates by Fountain On-trade: % Volume Growth 2020-2025
Table 11 - NBO Company Shares of Off-trade Carbonates: % Volume 2021-2025
Table 12 - LBN Brand Shares of Off-trade Carbonates: % Volume 2022-2025
Table 13 - NBO Company Shares of Off-trade Carbonates: % Value 2021-2025
Table 14 - LBN Brand Shares of Off-trade Carbonates: % Value 2022-2025
Table 15 - Forecast Off-trade Sales of Carbonates by Category: Volume 2025-2030
Table 16 - Forecast Off-trade Sales of Carbonates by Category: Value 2025-2030
Table 17 - Forecast Off-trade Sales of Carbonates by Category: % Volume Growth 2025-2030
Table 18 - Forecast Off-trade Sales of Carbonates by Category: % Value Growth 2025-2030
Table 19 - Forecast Total Sales of Carbonates by Fountain On-trade: Volume 2025-2030
Table 20 - Forecast Total Sales of Carbonates by Fountain On-trade: % Volume Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

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 21 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2020-2025
Table 22 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2020-2025
Table 23 - Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2020-2025
Table 24 - Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2020-2025
Table 25 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: Volume 2025
Table 26 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: % Volume 2025
Table 27 - Off-trade vs On-trade Sales of Soft Drinks by Category: Value 2025
Table 28 - Off-trade vs On-trade Sales of Soft Drinks by Category: % Value 2025
Table 29 - Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2020-2025
Table 30 - Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2020-2025
Table 31 - Off-trade Sales of Soft Drinks by Category: Value 2020-2025
Table 32 - Off-trade Sales of Soft Drinks by Category: % Value Growth 2020-2025
Table 33 - Sales of Soft Drinks by Total Fountain On-trade: Volume 2020-2025
Table 34 - Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2020-2025
Table 35 - NBO Company Shares of Total Soft Drinks (RTD): % Volume 2021-2025
Table 36 - LBN Brand Shares of Total Soft Drinks (RTD): % Volume 2022-2025
Table 37 - NBO Company Shares of On-trade Soft Drinks (RTD): % Volume 2021-2025
Table 38 - LBN Brand Shares of On-trade Soft Drinks (RTD): % Volume 2022-2025
Table 39 - NBO Company Shares of Off-trade Soft Drinks (RTD): % Volume 2021-2025
Table 40 - LBN Brand Shares of Off-trade Soft Drinks (RTD): % Volume 2022-2025
Table 41 - NBO Company Shares of Off-trade Soft Drinks: % Value 2021-2025
Table 42 - LBN Brand Shares of Off-trade Soft Drinks: % Value 2022-2025
Table 43 - Penetration of Private Label in Off-trade Soft Drinks (RTD) by Category: % Volume 2020-2025
Table 44 - Penetration of Private Label in Off-trade Soft Drinks by Category: % Value 2020-2025
Table 45 - Distribution of Off-trade Soft Drinks (as sold) by Format: % Volume 2020-2025
Table 46 - Distribution of Off-trade Soft Drinks (as sold) by Format and Category: % Volume 2025
Table 47 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2025-2030
Table 48 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2025-2030
Table 49 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2025-2030
Table 50 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2025-2030
Table 51 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2025-2030
Table 52 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2025-2030
Table 53 - Forecast Off-trade Sales of Soft Drinks by Category: Value 2025-2030
Table 54 - Forecast Off-trade Sales of Soft Drinks by Category: % Value Growth 2025-2030

Table 55 - Forecast Sales of Soft Drinks by Total Fountain On-trade: Volume 2025-2030

Table 56 - Forecast Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2025-2030

APPENDIX

Fountain sales in Spain

COUNTRY REPORTS DISCLAIMER

SOURCES

Summary 1 - Research Sources

About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/carbonates-in-spain/report.