



**Euromonitor
International**

Hot Drinks in Spain

November 2025

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EXECUTIVE SUMMARY

High prices, polarised demand and digitalisation shape hot drinks in Spain

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

2025 sees rising value sales as prices remain high

Functional positioning gains ground in tea as e-commerce expands

Sustainability remains key concern while technology drives development in foodservice

WHAT'S NEXT?

Coffee and tea will fare better than other hot drinks over the forecast period

Premiumisation and sustainability trends continue to inform innovation

Supermarkets channel to maintain distribution lead

COMPETITIVE LANDSCAPE

Nestlé leads hot drinks through portfolio of popular brands

Tea sees fastest value growth among hot drinks categories

CHANNELS

Supermarkets dominates distribution as e-commerce records greatest expansion

Foodservice rises faster than retail in 2025

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INDUSTRY PERFORMANCE

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WHAT'S NEXT?

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Acceleration of e-commerce as a key distribution channel

Rise of RTD coffee and functional variants could pose a challenge to coffee category

COMPETITIVE LANDSCAPE

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2025 DEVELOPMENTS

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INDUSTRY PERFORMANCE

Value sales rise for tea in 2025, driven primarily by fruit/herbal tea

Coffee continues to present competitive threat, though healthy properties support sales for tea

WHAT'S NEXT?

Growth set to come from functional segments

E-commerce will see further expansion over the forecast period
Traditional tea category will see intensified competition from RTD tea

COMPETITIVE LANDSCAPE

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KEY DATA FINDINGS

2025 DEVELOPMENTS

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INDUSTRY PERFORMANCE

As value sales rise, volumes continue to decline for other hot drinks in Spain
Chocolate variants fare better than the rest though still struggle

WHAT'S NEXT?

Other hot drinks set to see further decline over forecast period
Digital and technological category advancements aim to drive engagement with younger consumers
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COMPETITIVE LANDSCAPE

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