



Euromonitor
International

Concentrates in Italy

December 2025

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2025 DEVELOPMENTS

Innovation drives growth for powder concentrates amidst decline for liquid

INDUSTRY PERFORMANCE

Liquid concentrates face health scrutiny and generational gap

Innovation fuels growth for powder concentrates

WHAT'S NEXT?

Divergent fortunes expected for liquid and powder concentrates

Beyond traditional concentrates, new technologies and competitors set to emerge

Eco-conscious choices could drive value for concentrates

COMPETITIVE LANDSCAPE

Ristora leads powder concentrates, while traditional brand Fabbri sees share decline
waterdrop Microdrink GmbH reshapes the concentrates landscape

CHANNELS

Planned purchases and new brands fuel lead of supermarkets in concentrates

Social media and busy lifestyles fuel growth for retail e-commerce in concentrates

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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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