



Euromonitor
International

Bottled Water in Italy

December 2025

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Bottled Water in Italy - Category analysis

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2025 DEVELOPMENTS

Bottled water grows by meeting evolving consumer demands

INDUSTRY PERFORMANCE

Health, value, and strongly sparkling variants propel sales of bottled water

Flavoured and functional bottled water drive growth and innovation

WHAT'S NEXT?

Modest growth forecast amidst maturity and shifting consumer habits

Emotional resonance and wellness will be important in bottled water marketing

More sophisticated consumer demand to fuel surge in functional bottled water

COMPETITIVE LANDSCAPE

Fonti di Vinadio and private label shape the bottled water landscape

Smaller players see a surge, while Fonti di Vinadio innovates for growth

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COUNTRY REPORTS DISCLAIMER

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KEY DATA FINDINGS

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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

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