

Soft Drinks in Spain

Market Direction | 2023-12-04 | 91 pages | Euromonitor

AVAILABLE LICENSES:

- Single User Licence €1750.00
- Multiple User License (1 Site) €3500.00
- Multiple User License (Global) €5250.00

Report description:

For soft drinks in 2023, it is hard to start anywhere other than the impact of the high cost-of-living and the high inflation rate that has characterised much of the year. These factors have translated into sizeable rises in average unit prices across the soft drinks industry. Some brands tried to absorb any price rises - which came about as a result of elevated production costs and rising prices of raw materials - but ultimately many could not avoid raising prices for end consumers.

Euromonitor International's Soft Drinks in Spain report offers a comprehensive guide to the size and shape of the market at a national level. It provides the latest retail sales data (2018-2022), allowing you to identify the sectors driving growth. It identifies the leading companies, the leading brands and offers strategic analysis of key factors influencing the market - be they legislative, distribution, packaging or pricing issues. Forecasts to 2027 illustrate how the market is set to change.

Product coverage: Asian Speciality Drinks, Bottled Water, Carbonates, Concentrates, Energy Drinks, Juice, RTD Coffee, RTD Tea, Sports Drinks.

Data coverage: market sizes (historic and forecasts), company shares, brand shares and distribution data.

Why buy this report?

- * Get a detailed picture of the Soft Drinks market;
- * Pinpoint growth sectors and identify factors driving change;
- * Understand the competitive environment, the market's major players and leading brands;
- * Use five-year forecasts to assess how the market is predicted to develop.

Euromonitor International has over 40 years' experience of publishing market research reports, business reference books and online information systems. With offices in London, Chicago, Singapore, Shanghai, Vilnius, Dubai, Cape Town, Santiago, Sydney, Tokyo and Bangalore and a network of over 800 analysts worldwide, Euromonitor International has a unique capability to develop reliable information resources to help drive informed strategic planning.

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scott-international.com

www.scott-international.com

Table of Contents:

Soft Drinks in Spain
Euromonitor International
May 2024

List Of Contents And Tables

SOFT DRINKS IN SPAIN

EXECUTIVE SUMMARY

Soft drinks in 2023: The big picture

2023 key trends

Competitive landscape

Retailing developments

Foodservice vs retail split

What next for soft drinks?

MARKET DATA

Table 1 Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2018-2023

Table 2 Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2018-2023

Table 3 Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2018-2023

Table 4 Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2018-2023

Table 5 Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: Volume 2023

Table 6 Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: % Volume 2023

Table 7 Off-trade vs On-trade Sales of Soft Drinks by Category: Value 2023

Table 8 Off-trade vs On-trade Sales of Soft Drinks by Category: % Value 2023

Table 9 Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2018-2023

Table 10 ☐Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2018-2023

Table 11 ☐Off-trade Sales of Soft Drinks by Category: Value 2018-2023

Table 12 ☐Off-trade Sales of Soft Drinks by Category: % Value Growth 2018-2023

Table 13 ☐Sales of Soft Drinks by Total Fountain On-trade: Volume 2018-2023

Table 14 ☐Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2018-2023

Table 15 ☐NBO Company Shares of Total Soft Drinks (RTD): % Volume 2019-2023

Table 16 ☐LBN Brand Shares of Total Soft Drinks (RTD): % Volume 2020-2023

Table 17 ☐NBO Company Shares of On-trade Soft Drinks (RTD): % Volume 2019-2023

Table 18 ☐LBN Brand Shares of On-trade Soft Drinks (RTD): % Volume 2020-2023

Table 19 ☐NBO Company Shares of Off-trade Soft Drinks (RTD): % Volume 2019-2023

Table 20 ☐LBN Brand Shares of Off-trade Soft Drinks (RTD): % Volume 2020-2023

Table 21 ☐NBO Company Shares of Off-trade Soft Drinks: % Value 2019-2023

Table 22 ☐LBN Brand Shares of Off-trade Soft Drinks: % Value 2020-2023

Table 23 ☐Penetration of Private Label in Off-trade Soft Drinks (RTD) by Category: % Volume 2018-2023

Table 24 ☐Penetration of Private Label in Off-trade Soft Drinks by Category: % Value 2018-2023

Table 25 ☐Distribution of Off-trade Soft Drinks (as sold) by Format: % Volume 2018-2023

Table 26 ☐Distribution of Off-trade Soft Drinks (as sold) by Format and Category: % Volume 2023

Table 27 ☐Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2023-2028

Table 28 ☐Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2023-2028

Table 29 ☐Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2023-2028

Table 30 ☐Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2023-2028

Table 31 ☐Forecast Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2023-2028

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Table 32 □Forecast Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2023-2028

Table 33 □Forecast Off-trade Sales of Soft Drinks by Category: Value 2023-2028

Table 34 □Forecast Off-trade Sales of Soft Drinks by Category: % Value Growth 2023-2028

Table 35 □Forecast Sales of Soft Drinks by Total Fountain On-trade: Volume 2023-2028

Table 36 □Forecast Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2023-2028

APPENDIX

Fountain sales in Spain

Trends

DISCLAIMER

SOURCES

Summary 1 Research Sources

CARBONATES IN SPAIN

KEY DATA FINDINGS

2023 DEVELOPMENTS

Varied performances for carbonates amidst a challenging operating environment

Innovation aplenty as shift to low calorie and reduced sugar products gathers steam

Packaging is a major area for development

PROSPECTS AND OPPORTUNITIES

Shift towards healthier drinks set to continue

Diversification will be key to attract and retain consumers

Private label share to remain elevated in the short term

CATEGORY DATA

Table 37 Off-trade vs On-trade Sales of Carbonates: Volume 2018-2023

Table 38 Off-trade vs On-trade Sales of Carbonates: Value 2018-2023

Table 39 Off-trade vs On-trade Sales of Carbonates: % Volume Growth 2018-2023

Table 40 Off-trade vs On-trade Sales of Carbonates: % Value Growth 2018-2023

Table 41 Off-trade Sales of Carbonates by Category: Volume 2018-2023

Table 42 Off-trade Sales of Carbonates by Category: Value 2018-2023

Table 43 Off-trade Sales of Carbonates by Category: % Volume Growth 2018-2023

Table 44 Off-trade Sales of Carbonates by Category: % Value Growth 2018-2023

Table 45 Total Sales of Carbonates by Fountain On-trade: Volume 2018-2023

Table 46 □Total Sales of Carbonates by Fountain On-trade: % Volume Growth 2018-2023

Table 47 □NBO Company Shares of Off-trade Carbonates: % Volume 2019-2023

Table 48 □LBN Brand Shares of Off-trade Carbonates: % Volume 2020-2023

Table 49 □NBO Company Shares of Off-trade Carbonates: % Value 2019-2023

Table 50 □LBN Brand Shares of Off-trade Carbonates: % Value 2020-2023

Table 51 □Forecast Off-trade Sales of Carbonates by Category: Volume 2023-2028

Table 52 □Forecast Off-trade Sales of Carbonates by Category: Value 2023-2028

Table 53 □Forecast Off-trade Sales of Carbonates by Category: % Volume Growth 2023-2028

Table 54 □Forecast Off-trade Sales of Carbonates by Category: % Value Growth 2023-2028

Table 55 □Forecast Total Sales of Carbonates by Fountain On-trade: Volume 2023-2028

Table 56 □Forecast Total Sales of Carbonates by Fountain On-trade: % Volume Growth 2023-2028

JUICE IN SPAIN

KEY DATA FINDINGS

2023 DEVELOPMENTS

Prices rises in another challenging year for juice

Diversification and value-added products two strands of innovation

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Private label sees growth in its share

PROSPECTS AND OPPORTUNITIES

Juice set to face challenges in the forecast period

Value-added products an area with potential

Return to pre-pandemic levels of sales unlikely

CATEGORY DATA

Table 57 Off-trade Sales of Juice by Category: Volume 2018-2023

Table 58 Off-trade Sales of Juice by Category: Value 2018-2023

Table 59 Off-trade Sales of Juice by Category: % Volume Growth 2018-2023

Table 60 Off-trade Sales of Juice by Category: % Value Growth 2018-2023

Table 61 NBO Company Shares of Off-trade Juice: % Volume 2019-2023

Table 62 LBN Brand Shares of Off-trade Juice: % Volume 2020-2023

Table 63 NBO Company Shares of Off-trade Juice: % Value 2019-2023

Table 64 LBN Brand Shares of Off-trade Juice: % Value 2020-2023

Table 65 Forecast Off-trade Sales of Juice by Category: Volume 2023-2028

Table 66 □Forecast Off-trade Sales of Juice by Category: Value 2023-2028

Table 67 □Forecast Off-trade Sales of Juice by Category: % Volume Growth 2023-2028

Table 68 □Forecast Off-trade Sales of Juice by Category: % Value Growth 2023-2028

BOTTLED WATER IN SPAIN

KEY DATA FINDINGS

2023 DEVELOPMENTS

Volume sales stagnate as prices rise

Private label sees a strong performance

Innovation continues in packaging

PROSPECTS AND OPPORTUNITIES

Only minor growth expected in a mature category

Opportunities for growth in value-added products and smaller categories

Diversification in pack sizes and formats also a way to drive growth

CATEGORY DATA

Table 69 Off-trade Sales of Bottled Water by Category: Volume 2018-2023

Table 70 Off-trade Sales of Bottled Water by Category: Value 2018-2023

Table 71 Off-trade Sales of Bottled Water by Category: % Volume Growth 2018-2023

Table 72 Off-trade Sales of Bottled Water by Category: % Value Growth 2018-2023

Table 73 NBO Company Shares of Off-trade Bottled Water: % Volume 2019-2023

Table 74 LBN Brand Shares of Off-trade Bottled Water: % Volume 2020-2023

Table 75 NBO Company Shares of Off-trade Bottled Water: % Value 2019-2023

Table 76 LBN Brand Shares of Off-trade Bottled Water: % Value 2020-2023

Table 77 Forecast Off-trade Sales of Bottled Water by Category: Volume 2023-2028

Table 78 □Forecast Off-trade Sales of Bottled Water by Category: Value 2023-2028

Table 79 □Forecast Off-trade Sales of Bottled Water by Category: % Volume Growth 2023-2028

Table 80 □Forecast Off-trade Sales of Bottled Water by Category: % Value Growth 2023-2028

SPORTS DRINKS IN SPAIN

KEY DATA FINDINGS

2023 DEVELOPMENTS

Positive performance in both channels, despite a challenging operating environment

Launch of Prime a boost for the category

Innovation and new product development seen within sports drinks

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

PROSPECTS AND OPPORTUNITIES

Growth expected as sports drinks benefits from the health and wellness trend

Need to distinguish sports drinks from other products with functional qualities

Private label offers expected to develop

CATEGORY DATA

Table 81 Off-trade Sales of Sports Drinks: Volume 2018-2023

Table 82 Off-trade Sales of Sports Drinks: Value 2018-2023

Table 83 Off-trade Sales of Sports Drinks: % Volume Growth 2018-2023

Table 84 Off-trade Sales of Sports Drinks: % Value Growth 2018-2023

Table 85 NBO Company Shares of Off-trade Sports Drinks: % Volume 2019-2023

Table 86 LBN Brand Shares of Off-trade Sports Drinks: % Volume 2020-2023

Table 87 NBO Company Shares of Off-trade Sports Drinks: % Value 2019-2023

Table 88 LBN Brand Shares of Off-trade Sports Drinks: % Value 2020-2023

Table 89 Forecast Off-trade Sales of Sports Drinks: Volume 2023-2028

Table 90 □Forecast Off-trade Sales of Sports Drinks: Value 2023-2028

Table 91 □Forecast Off-trade Sales of Sports Drinks: % Volume Growth 2023-2028

Table 92 □Forecast Off-trade Sales of Sports Drinks: % Value Growth 2023-2028

ENERGY DRINKS IN SPAIN

KEY DATA FINDINGS

2023 DEVELOPMENTS

Solid performance amidst a challenging operating environment

Monster Energy cements its position as leader in volume terms

Plenty of innovation in energy drinks

PROSPECTS AND OPPORTUNITIES

Appealing to a broader consumer base remains a challenge

Some legislative developments expected

Reduced sugar to see more dynamic growth despite challenge from other categories

CATEGORY DATA

Table 93 Off-trade Sales of Energy Drinks: Volume 2018-2023

Table 94 Off-trade Sales of Energy Drinks: Value 2018-2023

Table 95 Off-trade Sales of Energy Drinks: % Volume Growth 2018-2023

Table 96 Off-trade Sales of Energy Drinks: % Value Growth 2018-2023

Table 97 NBO Company Shares of Off-trade Energy Drinks: % Volume 2019-2023

Table 98 LBN Brand Shares of Off-trade Energy Drinks: % Volume 2020-2023

Table 99 NBO Company Shares of Off-trade Energy Drinks: % Value 2019-2023

Table 100 LBN Brand Shares of Off-trade Energy Drinks: % Value 2020-2023

Table 101 Forecast Off-trade Sales of Energy Drinks: Volume 2023-2028

Table 102 □Forecast Off-trade Sales of Energy Drinks: Value 2023-2028

Table 103 □Forecast Off-trade Sales of Energy Drinks: % Volume Growth 2023-2028

Table 104 □Forecast Off-trade Sales of Energy Drinks: % Value Growth 2023-2028

CONCENTRATES IN SPAIN

KEY DATA FINDINGS

2023 DEVELOPMENTS

Off-trade volume sales stagnate, while value sales rise with the impact of inflation

Strong competition from other soft drinks categories

A concentrated category, with limited private label presence

PROSPECTS AND OPPORTUNITIES

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Decline predicted for concentrates

Functional concentrates could be a way to stem the decline

Diversification in liquid concentrates could help maintain sales

CATEGORY DATA

Concentrates conversions

Summary 2 Concentrates Conversion Factors for Ready-to-Drink (RTD) Format

Table 105 Off-trade Sales of Concentrates (RTD) by Category: Volume 2018-2023

Table 106 Off-trade Sales of Concentrates (RTD) by Category: % Volume Growth 2018-2023

Table 107 Off-trade Sales of Concentrates by Category: Value 2018-2023

Table 108 Off-trade Sales of Concentrates by Category: % Value Growth 2018-2023

Table 109 LBN Brand Shares of Off-trade Concentrates (RTD): % Volume 2020-2023

Table 110 NBO Company Shares of Off-trade Concentrates: % Value 2019-2023

Table 111 LBN Brand Shares of Off-trade Concentrates: % Value 2020-2023

Table 112 NBO Company Shares of Off-trade Liquid Concentrates (RTD): % Volume 2019-2023

Table 113 LBN Brand Shares of Off-trade Liquid Concentrates (RTD): % Volume 2020-2023

Table 114 □NBO Company Shares of Off-trade Powder Concentrates (RTD): % Volume 2019-2023

Table 115 □LBN Brand Shares of Off-trade Powder Concentrates (RTD): % Volume 2020-2023

Table 116 □Forecast Off-trade Sales of Concentrates (RTD) by Category: Volume 2023-2028

Table 117 □Forecast Off-trade Sales of Concentrates (RTD) by Category: % Volume Growth 2023-2028

Table 118 □Forecast Off-trade Sales of Concentrates by Category: Value 2023-2028

Table 119 □Forecast Off-trade Sales of Concentrates by Category: % Value Growth 2023-2028

RTD TEA IN SPAIN

KEY DATA FINDINGS

2023 DEVELOPMENTS

Innovation abounds as Fuze Tea enters RTD tea in Spain

RTD tea is a consolidated category, while private label performs well in 2023

Perception as healthy alternative to other soft drinks benefits RTD tea

PROSPECTS AND OPPORTUNITIES

Despite continued high growth rates, questions over the future of kombucha

Volume sales will remain dominated by the off-trade channel

Wide channel presence will be necessary for success

CATEGORY DATA

Table 120 Off-trade Sales of RTD Tea by Category: Volume 2018-2023

Table 121 Off-trade Sales of RTD Tea by Category: Value 2018-2023

Table 122 Off-trade Sales of RTD Tea by Category: % Volume Growth 2018-2023

Table 123 Off-trade Sales of RTD Tea by Category: % Value Growth 2018-2023

Table 124 Leading Flavours for Off-trade RTD Tea: % Volume 2018-2023

Table 125 NBO Company Shares of Off-trade RTD Tea: % Volume 2019-2023

Table 126 LBN Brand Shares of Off-trade RTD Tea: % Volume 2020-2023

Table 127 NBO Company Shares of Off-trade RTD Tea: % Value 2019-2023

Table 128 LBN Brand Shares of Off-trade RTD Tea: % Value 2020-2023

Table 129 □Forecast Off-trade Sales of RTD Tea by Category: Volume 2023-2028

Table 130 □Forecast Off-trade Sales of RTD Tea by Category: Value 2023-2028

Table 131 □Forecast Off-trade Sales of RTD Tea by Category: % Volume Growth 2023-2028

Table 132 □Forecast Off-trade Sales of RTD Tea by Category: % Value Growth 2023-2028

RTD COFFEE IN SPAIN

KEY DATA FINDINGS

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

2023 DEVELOPMENTS

Plenty of innovation in a dynamic category

What kind of future is there for cold brew coffee?

Private label performs well in a challenging operating environment

PROSPECTS AND OPPORTUNITIES

RTD coffee still has plenty of room for growth

On-trade expansion likely to be limited, given the key characteristics of RTD coffee

Contextualising RTD coffee in relation to other categories

CATEGORY DATA

Table 133 Off-trade Sales of RTD Coffee: Volume 2018-2023

Table 134 Off-trade Sales of RTD Coffee: Value 2018-2023

Table 135 Off-trade Sales of RTD Coffee: % Volume Growth 2018-2023

Table 136 Off-trade Sales of RTD Coffee: % Value Growth 2018-2023

Table 137 NBO Company Shares of Off-trade RTD Coffee: % Volume 2019-2023

Table 138 LBN Brand Shares of Off-trade RTD Coffee: % Volume 2020-2023

Table 139 NBO Company Shares of Off-trade RTD Coffee: % Value 2019-2023

Table 140 LBN Brand Shares of Off-trade RTD Coffee: % Value 2020-2023

Table 141 Forecast Off-trade Sales of RTD Coffee: Volume 2023-2028

Table 142 □Forecast Off-trade Sales of RTD Coffee: Value 2023-2028

Table 143 □Forecast Off-trade Sales of RTD Coffee: % Volume Growth 2023-2028

Table 144 □Forecast Off-trade Sales of RTD Coffee: % Value Growth 2023-2028

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Soft Drinks in Spain

Market Direction | 2023-12-04 | 91 pages | Euromonitor

To place an Order with Scotts International:

- Print this form
- Complete the relevant blank fields and sign
- Send as a scanned email to support@scott's-international.com

ORDER FORM:

Select license	License	Price
	Single User Licence	€1750.00
	Multiple User License (1 Site)	€3500.00
	Multiple User License (Global)	€5250.00
		VAT
		Total

*Please circle the relevant license option. For any questions please contact support@scott's-international.com or 0048 603 394 346.

** VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*	<input type="text"/>	Phone*	<input type="text"/>
First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Job title*	<input type="text"/>		
Company Name*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>
Address*	<input type="text"/>	City*	<input type="text"/>
Zip Code*	<input type="text"/>	Country*	<input type="text"/>
		Date	<input type="text" value="2026-03-07"/>
		Signature	<input type="text"/>

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scott's-international.com

www.scott's-international.com