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Spanish Households Bought 20.1% Less Wine for Home Consumption Since 2017

Its share of household beverage spending fell to 11.5%, the sharpest decline among Spain’s main drink categories.

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Wine and wine-based drinks sold for home consumption in Spain have fallen 20.1% in volume since 2017, while bottled water has gained ground in household purchases, according to a study published Wednesday by wine market consultancy Del Rey AWM.

The report, based on the Spanish Agriculture Ministry’s household food consumption panel, said wine and its derivatives totaled 401.8 million liters in the 12-month period ending in July 2026, down from 502.5 million liters in 2017. Revenue for the category still rose 13.7% over that period to €1.3148 billion, but that increase lagged far behind the broader drinks market in Spanish food retail. Wine’s share of total beverage volume bought by households fell from 5.0% to 4.2%, while its share of total spending dropped from 13.2% to 11.5%. The 1.7-point decline in value share was the largest among the main beverage categories tracked in the study.

Del Rey AWM examined how household demand has shifted since 2017 across wine, beer, cider, spirits, bottled water, soft drinks, juices, milk, coffee, tea and infusions, and a catchall category that includes products such as plant-based, organic, and gluten-free drinks. The firm used what it called “share of stomach,” a measure of how much of total beverage volume goes to each category as consumers change what they buy.

The broader market data show that Spanish households are buying slightly fewer drinks overall, but paying much more for them. Combined sales across the tracked categories reached 9.6497 billion liters in the latest 12-month period, down 3.5% from 9.9977 billion liters in 2017. At the same time, spending climbed 30.2%, from €8.7516 billion to €11.3917 billion. The average price across the full beverage basket rose from about €0.88 per liter to €1.18, a 34.9% increase.

The study said the long-term pattern is similar. In 2000, households bought 8.7818 billion liters of drinks through the food retail channel, only 9.9% less than in the latest period. But spending has nearly doubled since then, rising 102% from €5.6402 billion. The average price per liter has increased 83.8% since the start of the century, from €0.64 to €1.18.

The report stressed that the figures cover only the food retail channel and exclude drinks consumed in bars, restaurants, and other hospitality venues. They also do not include tap water. That matters especially for alcoholic beverages, where out-of-home consumption remains significant. The consultancy also noted that Spain’s Agriculture Ministry has changed some category definitions over time, although it said the main data series remain comparable.

Bottled water has been the clearest winner in volume terms. It represented about 28% of all beverages bought for home consumption in 2017, but now accounts for more than 31.6%, a gain of 3.6 percentage points. That has pushed it ahead of milk, which held the top spot a decade ago. Milk's volume share has fallen by about two points, from roughly 32% to 30%.

The two categories have some of the lowest prices in the market, but they have moved differently in household spending. Bottled water's average price rose to €0.24 per liter from €0.21, an increase of 14.6%, far below the market average. That helped water gain ground in liters sold, but not in value. Its share of total spending slipped by 0.3 percentage points. Milk lost volume share as well, but its value share fell only 0.3 points because its average price climbed 41.9% to €0.98 per liter. Milk still accounts for about one-quarter of household beverage spending, compared with roughly 7% for bottled water.

Soft drinks have also lost presence in household baskets. Their share of beverage volume has fallen by 1.9 percentage points since 2017 from about 19%, but their value share is down only 0.1 points. The study linked that to a 48.8% increase in average prices, which now stand at €1.20 per liter. Juices and nectars fared worse. Their share has fallen by 1.5 points in both volume and value, even though average prices rose 47.9% to €1.53 per liter.

Coffee, tea, and infusions followed a different path. Their volume share has been nearly flat, gaining 0.1 points, but their share of spending has risen by 2.6 points, the largest value gain of any category in the study. Volume sold increased 7.6% over the period, while the average price jumped 45.4%, from €14.69 per liter to €21.37. That makes coffee and infusions the highest-priced category in the data, even above spirits.

Beer and cider were far more stable. Beer's volume share rose 0.2 points and its value share increased 0.3 points, while its average price climbed 35.1% to €1.65 per liter. Cider's volume share was essentially unchanged and its value share rose 0.1 points, despite one of the strongest price increases in the market, up 56.5% to €3.17 per liter. Spirits showed another pattern: volume share held steady, but value share fell by 1.1 points because average prices rose only 9.9%, well below the overall beverage market.

For wine, the central issue was that price growth did not offset the drop in liters sold as effectively as it did in some other categories. The average price of wine and wine-based drinks rose 42.2% since 2017, from €2.30 to €3.27 per liter. That increase was more than seven points above the 34.9% rise in the overall drinks basket, but it still left the category trailing the market in revenue growth. While total household beverage spending rose 30.2%, wine revenue increased only 13.7%.

The decline has not been evenly spread across the wine market. Wines with Protected Designation of Origin or Protected Geographical Indication, known in Spain as DOP and IGP, proved more resilient than wines sold without those labels. According to the ministry data cited in the study, volume sales of DOP or IGP wines fell 7.1% since 2017, compared with a 25.5% drop for wines without those indications. In absolute terms, purchases of DOP and IGP wines slipped from about 195.5 million liters to 181.7 million liters, while non-DOP and non-IGP wines fell from 174.5 million liters to about 130 million liters.

Value trends also diverged. DOP and IGP wines increased revenue 12.4%, from €786.8 million to €884.5 million. Wines without origin labels rose just 3.8%, from €217.4 million to €225.7 million. The consultancy said that shift in the mix of purchases helped lift the average price of the overall wine category. It said the revaluation of wine reflects not only higher prices for individual products, but also a larger share of household purchases moving toward more expensive segments.

The data also show wine-based drinks losing close to 20% in volume since 2017, though higher prices still pushed their revenue up 13.7%. Organic wines have appeared in the statistics as a small but growing part of the category.

Del Rey AWM said the figures do not point to one simple explanation for the market shifts. A preference for lower-alcohol products could help explain weaker demand for wine and spirits, the report said, but that does not fit the relative stability of beer and cider. It also does not explain why milk and juice, both nonalcoholic, have also lost share. Price is not a complete answer either. Bottled water, one of the cheapest categories, gained volume share, while milk, also low-priced, lost ground. Coffee and infusions managed to hold or slightly expand volumes despite steep price increases.

The consultancy said differences in how consumers respond to price increases may be part of the explanation.

The report also pointed to changes within wine itself, where sparkling wines and whites have been performing better than traditional reds. At the same time, that shift toward fresher products is not mirrored across the full drinks market, since soft drinks and juices have also lost share. The uneven trends are prompting beverage companies to broaden their product ranges and look for new lines of business as Spanish household buying habits continue to change.