



RTD Coffee in the Philippines

December 2025

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RTD Coffee in the Philippines - Category analysis

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2025 DEVELOPMENTS

RTD coffee expands on convenience, with premium imports adding momentum

INDUSTRY PERFORMANCE

RTD coffee sees strong growth in both volume and value terms in 2025

Premiumisation drives growth in imported RTD coffee

WHAT'S NEXT?

Continued steady growth forecast for RTD coffee in the Philippines

Category players may reposition products to capture growth through premiumisation

Sustainability concerns increasingly shape sourcing and brand positioning

COMPETITIVE LANDSCAPE

Tirta Fresindo Jaya leads thanks to Kopiko Lucky Day brand

Convenience trends supports Nestlé's continued rise within RTD coffee in the Philippines

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Supermarkets channel benefits from competitive pricing and bulk offerings

Persistent digitalisation fuels e-commerce expansion

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Pricing discipline and digital engagement support soft drinks recovery

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INDUSTRY PERFORMANCE

Retail value sales rise amid stabilising prices

Affordability concerns prompt players to focus on cost to consumers

Health and wellness trends remain critical to development

WHAT'S NEXT?

Digital and technological advancements to support further growth and development

Increased competitive threat from foodservice

Sustainability concerns will continue to exert strong influence on innovation

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