



# Concentrates in Kenya

December 2025

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## Concentrates in Kenya - Category analysis

### KEY DATA FINDINGS

#### 2025 DEVELOPMENTS

Concentrates faces challenges

#### INDUSTRY PERFORMANCE

Muted volume growth as consumers seek healthier beverage options

Leading liquid concentrates benefit from their convenience and versatility

#### WHAT'S NEXT?

Affordability will continue to influence demand

Technological advancements will enable advanced evaporation techniques

Adoption of sustainable practices is crucial

#### COMPETITIVE LANDSCAPE

Excel Chemicals leads with its Quencher brand a household name

Jetlak Foods offers a diverse portfolio of popular brands

#### CHANNELS

Small local grocers dominate with an extensive geographic reach

E-commerce platforms carry a full range of soft drinks, including concentrates

Concentrates Conversions

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## Soft Drinks in Kenya - Industry Overview

### EXECUTIVE SUMMARY

Soft drinks remains resilient in 2025

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#### INDUSTRY PERFORMANCE

Rising demand for lighter, better-for-you options

Escalating production costs drive price increases

Consumer caution and downgrading

## WHAT'S NEXT?

Economic recovery and innovation will sustain growth

Evolving consumer preferences and a more sophisticated retail landscape

Sustainability to play an increasingly important role

## COMPETITIVE LANDSCAPE

Coca-Cola, present in the market since 1948, maintains its lead

Coca-Cola strengthens its position through significant investment, acquisitions and diversifying its portfolio

## CHANNELS

Leading small local grocers face an increasingly challenging operating landscape

Convenient e-commerce

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