



Carbonates in Kenya

December 2025

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Carbonates in Kenya - Category analysis

KEY DATA FINDINGS

2025 DEVELOPMENTS

Rising disposable incomes, urbanisation and innovation drive growth in 2025

INDUSTRY PERFORMANCE

Positive performance for carbonates supported by lifestyle trends

Reduced sugar cola carbonates benefits from innovation and health trend

WHAT'S NEXT?

Carbonates set to continue their upward trajectory

Technological advancements enable improved product innovation

Rising importance of sustainability

COMPETITIVE LANDSCAPE

Coca-Cola continues to dominate

Significant investment and a diverse portfolio drive growth of Coca-Cola

CHANNELS

Small local grocers maintain their lead

Robust growth of e-commerce

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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
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