



Euromonitor
International

Soft Drinks in Kenya

December 2025

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EXECUTIVE SUMMARY

Soft drinks remains resilient in 2025

KEY DATA FINDINGS

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
Foodservice vs retail split

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[Bottled Water in Kenya](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Concerns over unsafe tap water support demand

INDUSTRY PERFORMANCE

Bottled water is seen as a necessity with limited access to safe drinking water

Shifting lifestyles contribute to growth of still spring bottled water

WHAT'S NEXT?

Consumer distrust of tap water will continue to support demand for bottled water

Technological advancements will enable product innovation

Sustainable development infrastructure projects to address drinking water access issues

COMPETITIVE LANDSCAPE

Aquamist leads, offering a broad product range

Coca-Cola gains ground

CHANNELS

Supermarkets valued for their competitive pricing and promotions

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[Carbonates in Kenya](#)

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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

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[Concentrates in Kenya](#)

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
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[Juice in Kenya](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Juice continues its upward trajectory in 2025

INDUSTRY PERFORMANCE

Moderate increase supported by population expansion and urbanisation
Affordable nectars record the strongest growth

WHAT'S NEXT?

Organic and functional juice to drive growth
Technological advances will lead to improved production efficiency
Sustainability is set to become increasingly important

COMPETITIVE LANDSCAPE

Kevian Kenya Ltd maintains its clear lead in 2025
Increased investment enables Kevian Kenya to expand its operations

CHANNELS

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Energy Drinks in Kenya

KEY DATA FINDINGS

2025 DEVELOPMENTS

Young, active consumers increasingly opt for energy drinks

INDUSTRY PERFORMANCE

Changing lifestyles and innovation support growth in 2025
Reduced sugar energy drinks benefit from rising health concerns

WHAT'S NEXT?

Energy drinks ' growth will be boosted by an increasingly active population
Enriched formulations through technological advancements
Influence of global health and wellness trends

COMPETITIVE LANDSCAPE

Red Bull leads, successfully differentiating itself from its competitors
Red Bull adapts to local trends and tastes

CHANNELS

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