



Euromonitor  
International

# Concentrates in the Philippines

December 2025

Table of Contents

## Concentrates in the Philippines - Category analysis

### KEY DATA FINDINGS

#### 2025 DEVELOPMENTS

Powder formats sustain concentrates as brands add health cues

#### INDUSTRY PERFORMANCE

Rising retail volume sales benefit from strong demand for powder concentrates

Powder concentrates proves most popular format

#### WHAT'S NEXT?

Retail volume sales expected to rise steadily, supported stable performance of powder concentrates

Players likely to increasingly leverage digital tools for engagement and marketing

Development will be impacted by growing health awareness

#### COMPETITIVE LANDSCAPE

Mondelez maintains overall leadership in 2025

Nestlé benefits from strategic marketing of Nestea brand

#### CHANNELS

Supermarkets leads distribution

E-commerce continues to rise as mobile shopping gains ground in 2025

Concentrates Conversions

Summary 1 - Concentrates Conversion Factors for Ready-to-Drink (RTD) Format

#### CATEGORY DATA

Table 1 - Off-trade Sales of Concentrates (RTD) by Category: Volume 2020-2025

Table 2 - Off-trade Sales of Concentrates (RTD) by Category: % Volume Growth 2020-2025

Table 3 - Off-trade Sales of Concentrates by Category: Value 2020-2025

Table 4 - Off-trade Sales of Concentrates by Category: % Value Growth 2020-2025

Table 5 - LBN Brand Shares of Off-trade Concentrates (RTD): % Volume 2022-2025

Table 6 - NBO Company Shares of Off-trade Concentrates: % Value 2021-2025

Table 7 - LBN Brand Shares of Off-trade Concentrates: % Value 2022-2025

Table 8 - NBO Company Shares of Off-trade Liquid Concentrates (RTD): % Volume 2021-2025

Table 9 - LBN Brand Shares of Off-trade Liquid Concentrates (RTD): % Volume 2022-2025

Table 10 - NBO Company Shares of Off-trade Powder Concentrates (RTD): % Volume 2021-2025

Table 11 - LBN Brand Shares of Off-trade Powder Concentrates (RTD): % Volume 2022-2025

Table 12 - Forecast Off-trade Sales of Concentrates (RTD) by Category: Volume 2025-2030

Table 13 - Forecast Off-trade Sales of Concentrates (RTD) by Category: % Volume Growth 2025-2030

Table 14 - Forecast Off-trade Sales of Concentrates by Category: Value 2025-2030

Table 15 - Forecast Off-trade Sales of Concentrates by Category: % Value Growth 2025-2030

#### COUNTRY REPORTS DISCLAIMER

## Soft Drinks in the Philippines - Industry Overview

### EXECUTIVE SUMMARY

Pricing discipline and digital engagement support soft drinks recovery

### KEY DATA FINDINGS

#### 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

## COMPETITIVE LANDSCAPE

Coca-Cola maintains overall leadership

Nestlé invests in integrated marketing strategy

## CHANNELS

Small local grocers continues as key retail distribution channel

Foodservice remains key growth driver

## MARKET DATA

Table 16 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2020-2025

Table 17 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2020-2025

Table 18 - Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2020-2025

Table 19 - Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2020-2025

Table 20 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: Volume 2025

Table 21 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: % Volume 2025

Table 22 - Off-trade vs On-trade Sales of Soft Drinks by Category: Value 2025

Table 23 - Off-trade vs On-trade Sales of Soft Drinks by Category: % Value 2025

Table 24 - Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2020-2025

Table 25 - Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2020-2025

Table 26 - Off-trade Sales of Soft Drinks by Category: Value 2020-2025

Table 27 - Off-trade Sales of Soft Drinks by Category: % Value Growth 2020-2025

Table 28 - Sales of Soft Drinks by Total Fountain On-trade: Volume 2020-2025

Table 29 - Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2020-2025

Table 30 - NBO Company Shares of Total Soft Drinks (RTD): % Volume 2021-2025

Table 31 - LBN Brand Shares of Total Soft Drinks (RTD): % Volume 2022-2025

Table 32 - NBO Company Shares of On-trade Soft Drinks (RTD): % Volume 2021-2025

Table 33 - LBN Brand Shares of On-trade Soft Drinks (RTD): % Volume 2022-2025

Table 34 - NBO Company Shares of Off-trade Soft Drinks (RTD): % Volume 2021-2025

Table 35 - LBN Brand Shares of Off-trade Soft Drinks (RTD): % Volume 2022-2025

Table 36 - NBO Company Shares of Off-trade Soft Drinks: % Value 2021-2025

Table 37 - LBN Brand Shares of Off-trade Soft Drinks: % Value 2022-2025

Table 38 - Penetration of Private Label in Off-trade Soft Drinks (RTD) by Category: % Volume 2020-2025

Table 39 - Penetration of Private Label in Off-trade Soft Drinks by Category: % Value 2020-2025

Table 40 - Distribution of Off-trade Soft Drinks (as sold) by Format: % Volume 2020-2025

Table 41 - Distribution of Off-trade Soft Drinks (as sold) by Format and Category: % Volume 2025

Table 42 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2025-2030

Table 43 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2025-2030

Table 44 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2025-2030

Table 45 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2025-2030

Table 46 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2025-2030

Table 47 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2025-2030

Table 48 - Forecast Off-trade Sales of Soft Drinks by Category: Value 2025-2030

Table 49 - Forecast Off-trade Sales of Soft Drinks by Category: % Value Growth 2025-2030

Table 50 - Forecast Sales of Soft Drinks by Total Fountain On-trade: Volume 2025-2030

Table 51 - Forecast Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2025-2030

## APPENDIX

Fountain sales in the Philippines

## COUNTRY REPORTS DISCLAIMER

## SOURCES

Summary 2 - Research Sources

### About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link [www.euromonitor.com/concentrates-in-the-philippines/report](http://www.euromonitor.com/concentrates-in-the-philippines/report).