



Concentrates in the Philippines

December 2025

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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

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Soft Drinks in the Philippines - Industry Overview

EXECUTIVE SUMMARY

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

COMPETITIVE LANDSCAPE

Coca-Cola maintains overall leadership

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