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International

# Soft Drinks in Angola

December 2025

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### EXECUTIVE SUMMARY

Growth of soft drinks sales in 2025 though demand is hampered by soaring inflation

### KEY DATA FINDINGS

### INDUSTRY PERFORMANCE

More consumers turn to value packaging

Consumers are becoming increasingly health-conscious

Government intensifies its efforts to strengthen the local supply chain in juice

### WHAT'S NEXT?

Forecast period sales driven by urbanisation and a growing young consumer base

Industry players respond to growing consumer health consciousness through the launch of innovative products

The development of modern grocery retailers and retail e-commerce widens consumer access to soft drinks

### COMPETITIVE LANDSCAPE

Refriango Lda remains a strong player in soft drinks

Yala continues to challenge Refriango's position by targeting young consumers

### CHANNELS

Small local grocers prevails in the distribution of soft drinks

Modern grocery retailers register the strongest growth

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## COUNTRY REPORTS DISCLAIMER

### CARBONATES

#### Key Data Findings

#### 2025 Developments

Demand for carbonates continues to rise despite inflationary pressures

#### Industry Performance

Urban dwellers remain the most common consumers of carbonates

Growing health and wellness trend limits growth of carbonates

#### What's Next?

Demand for carbonates benefits from improvement in economic conditions

Regional expansion plans enable Refriango to scale up its activities

Wider distribution of carbonates boosts consumer access

#### Competitive Landscape

Refriango continues to lead carbonates

Castel Groupe achieves the strongest growth

#### Channels

Small grocers dominates distribution

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#### Industry Performance

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#### What's Next?

Government initiatives continue boosting local processing capabilities

Labelling becomes an increasingly important differentiating tool especially among premium offerings

Ongoing domination of domestic brands though scope exists for their imported counterparts

#### Competitive Landscape

Refriango benefits from its strategic repositioning

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#### Industry Performance

Bottled water remains the only viable option for many people due to a lack of potability of tap water

Local players are ubiquitous and are being encouraged to switch from PET to glass packaging

#### What's Next?

Demand for bottled water benefits from the wellness trend

Sustainability shapes bottled water packaging

Population expansion and growing interest in health and wellness boost demand for bottled water

#### Competitive Landscape

Refriango continues to lead in bottled water

Nutre Angola records the strongest growth

#### Channels

Small local grocers continues to lead distribution

Supermarkets achieves the strongest growth

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#### Industry Performance

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Functional beverages and health needs drive premium growth

#### What's Next?

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Competitive Landscape

Multinationals are present in the country though their shares are too low to discern

Channels

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2025 Developments

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Industry Performance

Young adults and urban dwellers are the main consumers of energy drinks

Despite proliferation of sports facilities, demand for energy drinks peaks during hot weather periods

What's Next?

Demand for energy drinks benefits from improved penetration

More premium brands embrace on-trade channels

Demand contained to urban professionals who can afford the higher prices

Competitive Landscape

Refriango consolidates its lead as it expands its portfolio

Castel Groupe with its XXL brand achieves the strongest growth

Channels

More premium brands are betting on affluent consumers and the on-trade channel

Convenience retailers and retail e-commerce grow from a low base

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Industry Performance

Concentrates remains most popular among low socioeconomic groups

Powder concentrates continues to outshine liquid concentrates in popularity

What's Next?

Rising import duty fees affect demand over the forecast period

Innovation focuses on functional variants

Concentrates with natural ingredients enter the competitive landscape

Competitive LandSCAPE

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Channels

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## RTD COFFEE

### 2025 Developments

RTD coffee remains at an incipient development stage

### Industry Performance

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### What's Next?

Forecast period sales rise but the category remains niche

Industry players lack incentive to invest in developing RTD coffee

### Competitive Landscape

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### Channels

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