

## Soft Drinks in the Philippines

Market Direction | 2024-11-18 | 82 pages | Euromonitor

### AVAILABLE LICENSES:

- Single User Licence €2150.00
- Multiple User License (1 Site) €4300.00
- Multiple User License (Global) €6450.00

### Report description:

Despite ongoing inflationary pressures during the first half of the year, volume sales of soft drinks in the Philippines are poised for robust growth across both on-trade and off-trade channels in 2024. This positive outlook is largely driven by a resurgence in consumer mobility, which has supported spending in foodservice establishments as Filipinos return to their fast-paced routines and spend more time outside the home. As daily routines normalise, there has also been a notable increase in im...

Euromonitor International's Soft Drinks in Philippines report offers a comprehensive guide to the size and shape of the market at a national level. It provides the latest retail sales data (2019-2023), allowing you to identify the sectors driving growth. It identifies the leading companies, the leading brands and offers strategic analysis of key factors influencing the market - be they legislative, distribution, packaging or pricing issues. Forecasts to 2028 illustrate how the market is set to change.

Product coverage: Asian Speciality Drinks, Bottled Water, Carbonates, Concentrates, Energy Drinks, Juice, RTD Coffee, RTD Tea, Sports Drinks.

Data coverage: market sizes (historic and forecasts), company shares, brand shares and distribution data.

### Why buy this report?

- \* Get a detailed picture of the Soft Drinks market;
- \* Pinpoint growth sectors and identify factors driving change;
- \* Understand the competitive environment, the market's major players and leading brands;
- \* Use five-year forecasts to assess how the market is predicted to develop.

Euromonitor International has over 40 years' experience of publishing market research reports, business reference books and online information systems. With offices in London, Chicago, Singapore, Shanghai, Vilnius, Dubai, Cape Town, Santiago, Sydney, Tokyo and Bangalore and a network of over 800 analysts worldwide, Euromonitor International has a unique capability to develop reliable information resources to help drive informed strategic planning.

## Table of Contents:

Soft Drinks in the Philippines

Euromonitor International

November 2024

### List Of Contents And Tables

#### SOFT DRINKS IN THE PHILIPPINES

##### EXECUTIVE SUMMARY

Soft drinks in 2024: The big picture

2024 key trends

Competitive landscape

Retailing developments

Foodservice vs retail split

What next for soft drinks?

##### MARKET DATA

Table 1 Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2019-2024

Table 2 Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2019-2024

Table 3 Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2019-2024

Table 4 Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2019-2024

Table 5 Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: Volume 2024

Table 6 Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: % Volume 2024

Table 7 Off-trade vs On-trade Sales of Soft Drinks by Category: Value 2024

Table 8 Off-trade vs On-trade Sales of Soft Drinks by Category: % Value 2024

Table 9 Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2019-2024

Table 10 Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2019-2024

Table 11 Off-trade Sales of Soft Drinks by Category: Value 2019-2024

Table 12 Off-trade Sales of Soft Drinks by Category: % Value Growth 2019-2024

Table 13 Sales of Soft Drinks by Total Fountain On-trade: Volume 2019-2024

Table 14 Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2019-2024

Table 15 NBO Company Shares of Total Soft Drinks (RTD): % Volume 2020-2024

Table 16 LBN Brand Shares of Total Soft Drinks (RTD): % Volume 2021-2024

Table 17 NBO Company Shares of On-trade Soft Drinks (RTD): % Volume 2020-2024

Table 18 LBN Brand Shares of On-trade Soft Drinks (RTD): % Volume 2021-2024

Table 19 NBO Company Shares of Off-trade Soft Drinks (RTD): % Volume 2020-2024

Table 20 LBN Brand Shares of Off-trade Soft Drinks (RTD): % Volume 2021-2024

Table 21 NBO Company Shares of Off-trade Soft Drinks: % Value 2020-2024

Table 22 LBN Brand Shares of Off-trade Soft Drinks: % Value 2021-2024

Table 23 Penetration of Private Label in Off-trade Soft Drinks (RTD) by Category: % Volume 2019-2024

Table 24 Penetration of Private Label in Off-trade Soft Drinks by Category: % Value 2019-2024

Table 25 Distribution of Off-trade Soft Drinks (as sold) by Format: % Volume 2019-2024

Table 26 Distribution of Off-trade Soft Drinks (as sold) by Format and Category: % Volume 2024

Table 27 Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2024-2029

Table 28 Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2024-2029

Table 29 Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2024-2029

Table 30 Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2024-2029

Table 31 Forecast Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2024-2029

Table 32 □Forecast Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2024-2029

Table 33 □Forecast Off-trade Sales of Soft Drinks by Category: Value 2024-2029

Table 34 □Forecast Off-trade Sales of Soft Drinks by Category: % Value Growth 2024-2029

Table 35 □Forecast Sales of Soft Drinks by Total Fountain On-trade: Volume 2024-2029

Table 36 □Forecast Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2024-2029

## APPENDIX

Fountain sales in the Philippines

Trends

DISCLAIMER

SOURCES

Summary 1 Research Sources

CARBONATES IN THE PHILIPPINES

### KEY DATA FINDINGS

#### 2024 DEVELOPMENTS

Carbonates enjoy accelerated growth in 2024

Increase in demand for reduced sugar carbonates

Incumbent players invest in cross-industry product innovation

### PROSPECTS AND OPPORTUNITIES

Coca-Cola ramps up its investment, driving continued growth

Continued focus on health and wellness

Growing demand for convenient packaging, while roll-out of PET bottles is anticipated to accelerate

### CATEGORY DATA

Table 37 Off-trade vs On-trade Sales of Carbonates: Volume 2019-2024

Table 38 Off-trade vs On-trade Sales of Carbonates: Value 2019-2024

Table 39 Off-trade vs On-trade Sales of Carbonates: % Volume Growth 2019-2024

Table 40 Off-trade vs On-trade Sales of Carbonates: % Value Growth 2019-2024

Table 41 Off-trade Sales of Carbonates by Category: Volume 2019-2024

Table 42 Off-trade Sales of Carbonates by Category: Value 2019-2024

Table 43 Off-trade Sales of Carbonates by Category: % Volume Growth 2019-2024

Table 44 Off-trade Sales of Carbonates by Category: % Value Growth 2019-2024

Table 45 Total Sales of Carbonates by Fountain On-trade: Volume 2019-2024

Table 46 □Total Sales of Carbonates by Fountain On-trade: % Volume Growth 2019-2024

Table 47 □NBO Company Shares of Off-trade Carbonates: % Volume 2020-2024

Table 48 □LBN Brand Shares of Off-trade Carbonates: % Volume 2021-2024

Table 49 □NBO Company Shares of Off-trade Carbonates: % Value 2020-2024

Table 50 □LBN Brand Shares of Off-trade Carbonates: % Value 2021-2024

Table 51 □Forecast Off-trade Sales of Carbonates by Category: Volume 2024-2029

Table 52 □Forecast Off-trade Sales of Carbonates by Category: Value 2024-2029

Table 53 □Forecast Off-trade Sales of Carbonates by Category: % Volume Growth 2024-2029

Table 54 □Forecast Off-trade Sales of Carbonates by Category: % Value Growth 2024-2029

Table 55 □Forecast Total Sales of Carbonates by Fountain On-trade: Volume 2024-2029

Table 56 □Forecast Total Sales of Carbonates by Fountain On-trade: % Volume Growth 2024-2029

### JUICE IN THE PHILIPPINES

#### KEY DATA FINDINGS

#### 2024 DEVELOPMENTS

Modest growth for juice amid increase in snacking occasions

Health and wellness trend benefits key juice products

New product launches fuel growth the market

#### PROSPECTS AND OPPORTUNITIES

Juice set for further growth amid economic recovery, with focus on product expansion

Health and wellness trends to drive growth in 100% juice and coconut water

E-commerce will continue to grow

#### CATEGORY DATA

Table 57 Off-trade Sales of Juice by Category: Volume 2019-2024

Table 58 Off-trade Sales of Juice by Category: Value 2019-2024

Table 59 Off-trade Sales of Juice by Category: % Volume Growth 2019-2024

Table 60 Off-trade Sales of Juice by Category: % Value Growth 2019-2024

Table 61 NBO Company Shares of Off-trade Juice: % Volume 2020-2024

Table 62 LBN Brand Shares of Off-trade Juice: % Volume 2021-2024

Table 63 NBO Company Shares of Off-trade Juice: % Value 2020-2024

Table 64 LBN Brand Shares of Off-trade Juice: % Value 2021-2024

Table 65 Forecast Off-trade Sales of Juice by Category: Volume 2024-2029

Table 66  $\square$ Forecast Off-trade Sales of Juice by Category: Value 2024-2029

Table 67  $\square$ Forecast Off-trade Sales of Juice by Category: % Volume Growth 2024-2029

Table 68  $\square$ Forecast Off-trade Sales of Juice by Category: % Value Growth 2024-2029

#### BOTTLED WATER IN THE PHILIPPINES

##### KEY DATA FINDINGS

##### 2024 DEVELOPMENTS

Popularity of bottled water expands beyond urban centres

Functional bottle water gains traction amid health and wellness trends

Philippine Spring Water Resources strengthens its market leadership

#### PROSPECTS AND OPPORTUNITIES

Demand for clean, safe water will generate sustained growth

Bottled water will win over consumer preferences in foodservice, despite availability of safe options

Further innovation expected in sparkling and functional waters

#### CATEGORY DATA

Table 69 Off-trade Sales of Bottled Water by Category: Volume 2019-2024

Table 70 Off-trade Sales of Bottled Water by Category: Value 2019-2024

Table 71 Off-trade Sales of Bottled Water by Category: % Volume Growth 2019-2024

Table 72 Off-trade Sales of Bottled Water by Category: % Value Growth 2019-2024

Table 73 NBO Company Shares of Off-trade Bottled Water: % Volume 2020-2024

Table 74 LBN Brand Shares of Off-trade Bottled Water: % Volume 2021-2024

Table 75 NBO Company Shares of Off-trade Bottled Water: % Value 2020-2024

Table 76 LBN Brand Shares of Off-trade Bottled Water: % Value 2021-2024

Table 77 Forecast Off-trade Sales of Bottled Water by Category: Volume 2024-2029

Table 78  $\square$ Forecast Off-trade Sales of Bottled Water by Category: Value 2024-2029

Table 79  $\square$ Forecast Off-trade Sales of Bottled Water by Category: % Volume Growth 2024-2029

Table 80  $\square$ Forecast Off-trade Sales of Bottled Water by Category: % Value Growth 2024-2029

#### SPORTS DRINKS IN THE PHILIPPINES

##### KEY DATA FINDINGS

##### 2024 DEVELOPMENTS

PepsiCo names Drink Water Rivera as Gatorade ambassador to promote hydration and wellness

New competitor SIP Plus enters the sports drinks market as Gatorade Zero leads shift towards healthier options

Consumers seek more than just hydration

## PROSPECTS AND OPPORTUNITIES

Sports drinks market is poised for recovery, driven by health and wellness trends

Greater focus on functionality and added benefits

Reduced-sugar sports drinks have positive future

## CATEGORY DATA

Table 81 Off-trade Sales of Sports Drinks: Volume 2019-2024

Table 82 Off-trade Sales of Sports Drinks: Value 2019-2024

Table 83 Off-trade Sales of Sports Drinks: % Volume Growth 2019-2024

Table 84 Off-trade Sales of Sports Drinks: % Value Growth 2019-2024

Table 85 NBO Company Shares of Off-trade Sports Drinks: % Volume 2020-2024

Table 86 LBN Brand Shares of Off-trade Sports Drinks: % Volume 2021-2024

Table 87 NBO Company Shares of Off-trade Sports Drinks: % Value 2020-2024

Table 88 LBN Brand Shares of Off-trade Sports Drinks: % Value 2021-2024

Table 89 Forecast Off-trade Sales of Sports Drinks: Volume 2024-2029

Table 90 □Forecast Off-trade Sales of Sports Drinks: Value 2024-2029

Table 91 □Forecast Off-trade Sales of Sports Drinks: % Volume Growth 2024-2029

Table 92 □Forecast Off-trade Sales of Sports Drinks: % Value Growth 2024-2029

## ENERGY DRINKS IN THE PHILIPPINES

### KEY DATA FINDINGS

#### 2024 DEVELOPMENTS

Energy drinks register continued growth as they emerge as viable alternatives to carbonates

Reduced sugar energy drinks gain traction, alongside expansion of convenience stores

Coca-Cola Beverages Philippines re-enters energy drinks

## PROSPECTS AND OPPORTUNITIES

Energy drinks will see a positive trajectory

Demand for reduced sugar energy drinks may grow significantly

PET bottle format will continue to lead packaging

Shift to PET bottle packaging will drive growth

## CATEGORY DATA

Table 93 Off-trade Sales of Energy Drinks: Volume 2019-2024

Table 94 Off-trade Sales of Energy Drinks: Value 2019-2024

Table 95 Off-trade Sales of Energy Drinks: % Volume Growth 2019-2024

Table 96 Off-trade Sales of Energy Drinks: % Value Growth 2019-2024

Table 97 NBO Company Shares of Off-trade Energy Drinks: % Volume 2020-2024

Table 98 LBN Brand Shares of Off-trade Energy Drinks: % Volume 2021-2024

Table 99 NBO Company Shares of Off-trade Energy Drinks: % Value 2020-2024

Table 100 LBN Brand Shares of Off-trade Energy Drinks: % Value 2021-2024

Table 101 Forecast Off-trade Sales of Energy Drinks: Volume 2024-2029

Table 102 □Forecast Off-trade Sales of Energy Drinks: Value 2024-2029

Table 103 □Forecast Off-trade Sales of Energy Drinks: % Volume Growth 2024-2029

Table 104 □Forecast Off-trade Sales of Energy Drinks: % Value Growth 2024-2029

## CONCENTRATES IN THE PHILIPPINES

### KEY DATA FINDINGS

#### 2024 DEVELOPMENTS

Powder concentrates show some momentum, but lack of convenience remains a challenge

Mondelez Philippines launches Tang Fruit+ with Stevia in keeping with trend towards health-focused product innovation

Smaller players gain traction through direct selling and e-commerce

## PROSPECTS AND OPPORTUNITIES

Powder concentrates will see renewed interest

Health and wellness trends will create growth opportunities for zero-sugar concentrates

Lack of innovation in liquid concentrates highlights opportunity for inclusion of value-added features

## CATEGORY DATA

Concentrates conversions

Summary 2 Concentrates Conversion Factors for Ready-to-Drink (RTD) Format

Table 105 Off-trade Sales of Concentrates (RTD) by Category: Volume 2019-2024

Table 106 Off-trade Sales of Concentrates (RTD) by Category: % Volume Growth 2019-2024

Table 107 Off-trade Sales of Concentrates by Category: Value 2019-2024

Table 108 Off-trade Sales of Concentrates by Category: % Value Growth 2019-2024

Table 109 LBN Brand Shares of Off-trade Concentrates (RTD): % Volume 2021-2024

Table 110 NBO Company Shares of Off-trade Concentrates: % Value 2020-2024

Table 111 LBN Brand Shares of Off-trade Concentrates: % Value 2021-2024

Table 112 NBO Company Shares of Off-trade Liquid Concentrates (RTD): % Volume 2020-2024

Table 113 LBN Brand Shares of Off-trade Liquid Concentrates (RTD): % Volume 2021-2024

Table 114 NBO Company Shares of Off-trade Powder Concentrates (RTD): % Volume 2020-2024

Table 115 LBN Brand Shares of Off-trade Powder Concentrates (RTD): % Volume 2021-2024

Table 116 Forecast Off-trade Sales of Concentrates (RTD) by Category: Volume 2024-2029

Table 117 Forecast Off-trade Sales of Concentrates (RTD) by Category: % Volume Growth 2024-2029

Table 118 Forecast Off-trade Sales of Concentrates by Category: Value 2024-2029

Table 119 Forecast Off-trade Sales of Concentrates by Category: % Value Growth 2024-2029

## RTD TEA IN THE PHILIPPINES

### KEY DATA FINDINGS

#### 2024 DEVELOPMENTS

RTD tea continues to see robust gains

Coca-Cola Beverages seeks focuses on increasing product variety

Foodservice generates strong demand

## PROSPECTS AND OPPORTUNITIES

Further expansion for RTD tea

Reduced sugar RTD tea could benefit from health and wellness trend

Carbonated tea and kombucha may see noticeable shares

## CATEGORY DATA

Table 120 Off-trade Sales of RTD Tea by Category: Volume 2019-2024

Table 121 Off-trade Sales of RTD Tea by Category: Value 2019-2024

Table 122 Off-trade Sales of RTD Tea by Category: % Volume Growth 2019-2024

Table 123 Off-trade Sales of RTD Tea by Category: % Value Growth 2019-2024

Table 124 Leading Flavours for Off-trade RTD Tea: % Volume 2019-2024

Table 125 NBO Company Shares of Off-trade RTD Tea: % Volume 2020-2024

Table 126 LBN Brand Shares of Off-trade RTD Tea: % Volume 2021-2024

Table 127 NBO Company Shares of Off-trade RTD Tea: % Value 2020-2024

Table 128 LBN Brand Shares of Off-trade RTD Tea: % Value 2021-2024

Table 129 Forecast Off-trade Sales of RTD Tea by Category: Volume 2024-2029

Table 130 Forecast Off-trade Sales of RTD Tea by Category: Value 2024-2029

Table 131 Forecast Off-trade Sales of RTD Tea by Category: % Volume Growth 2024-2029

Table 132 Forecast Off-trade Sales of RTD Tea by Category: % Value Growth 2024-2029

## RTD COFFEE IN THE PHILIPPINES

## KEY DATA FINDINGS

### 2024 DEVELOPMENTS

RTD coffee sees sustained growth

Nestle steps up its marketing efforts

Premiumisation drives growth in imported RTD coffee

### PROSPECTS AND OPPORTUNITIES

Further volume growth anticipated for RTD coffee, driven by premiumisation

Tie-ups with foodservice establishments could be a key growth strategy

E-commerce presence will become crucial

### CATEGORY DATA

Table 133 Off-trade Sales of RTD Coffee: Volume 2019-2024

Table 134 Off-trade Sales of RTD Coffee: Value 2019-2024

Table 135 Off-trade Sales of RTD Coffee: % Volume Growth 2019-2024

Table 136 Off-trade Sales of RTD Coffee: % Value Growth 2019-2024

Table 137 NBO Company Shares of Off-trade RTD Coffee: % Volume 2020-2024

Table 138 LBN Brand Shares of Off-trade RTD Coffee: % Volume 2021-2024

Table 139 NBO Company Shares of Off-trade RTD Coffee: % Value 2020-2024

Table 140 LBN Brand Shares of Off-trade RTD Coffee: % Value 2021-2024

Table 141 Forecast Off-trade Sales of RTD Coffee: Volume 2024-2029

Table 142  $\square$ Forecast Off-trade Sales of RTD Coffee: Value 2024-2029

Table 143  $\square$ Forecast Off-trade Sales of RTD Coffee: % Volume Growth 2024-2029

Table 144  $\square$ Forecast Off-trade Sales of RTD Coffee: % Value Growth 2024-2029

**Soft Drinks in the Philippines**

Market Direction | 2024-11-18 | 82 pages | Euromonitor

To place an Order with Scotts International:

- Print this form
- Complete the relevant blank fields and sign
- Send as a scanned email to support@scotts-international.com

**ORDER FORM:**

Select license	License	Price
	Single User Licence	€2150.00
	Multiple User License (1 Site)	€4300.00
	Multiple User License (Global)	€6450.00
		VAT
		Total

\*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

\*\* VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*	Phone*	
First Name*	Last Name*	
Job title*		
Company Name*	EU Vat / Tax ID / NIP number*	
Address*	City*	
Zip Code*	Country*	
	Date	2026-02-07
	Signature	

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

[www.scotts-international.com](http://www.scotts-international.com)