



Euromonitor
International

Soft Drinks in the Philippines

December 2025

Table of Contents

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

Table 2 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2020-2025

Table 3 - Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2020-2025

Table 4 - Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2020-2025

Table 5 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: Volume 2025

Table 6 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: % Volume 2025

Table 7 - Off-trade vs On-trade Sales of Soft Drinks by Category: Value 2025

Table 8 - Off-trade vs On-trade Sales of Soft Drinks by Category: % Value 2025

Table 9 - Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2020-2025

Table 10 - Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2020-2025

Table 11 - Off-trade Sales of Soft Drinks by Category: Value 2020-2025

Table 12 - Off-trade Sales of Soft Drinks by Category: % Value Growth 2020-2025

Table 13 - Sales of Soft Drinks by Total Fountain On-trade: Volume 2020-2025

Table 14 - Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2020-2025

Table 15 - NBO Company Shares of Total Soft Drinks (RTD): % Volume 2021-2025

Table 16 - LBN Brand Shares of Total Soft Drinks (RTD): % Volume 2022-2025

Table 17 - NBO Company Shares of On-trade Soft Drinks (RTD): % Volume 2021-2025

Table 18 - LBN Brand Shares of On-trade Soft Drinks (RTD): % Volume 2022-2025

Table 19 - NBO Company Shares of Off-trade Soft Drinks (RTD): % Volume 2021-2025

Table 20 - LBN Brand Shares of Off-trade Soft Drinks (RTD): % Volume 2022-2025

Table 21 - NBO Company Shares of Off-trade Soft Drinks: % Value 2021-2025

Table 22 - LBN Brand Shares of Off-trade Soft Drinks: % Value 2022-2025

Table 23 - Penetration of Private Label in Off-trade Soft Drinks (RTD) by Category: % Volume 2020-2025

Table 24 - Penetration of Private Label in Off-trade Soft Drinks by Category: % Value 2020-2025

Table 25 - Distribution of Off-trade Soft Drinks (as sold) by Format: % Volume 2020-2025

Table 26 - Distribution of Off-trade Soft Drinks (as sold) by Format and Category: % Volume 2025

Table 27 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2025-2030

Table 28 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2025-2030

Table 29 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2025-2030
Table 30 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2025-2030
Table 31 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2025-2030
Table 32 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2025-2030
Table 33 - Forecast Off-trade Sales of Soft Drinks by Category: Value 2025-2030
Table 34 - Forecast Off-trade Sales of Soft Drinks by Category: % Value Growth 2025-2030
Table 35 - Forecast Sales of Soft Drinks by Total Fountain On-trade: Volume 2025-2030
Table 36 - 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 1 - Research Sources

[Bottled Water in the Philippines](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Still purified water anchors growth as functionality expands

INDUSTRY PERFORMANCE

Bottled water sees strong retail volume sales in 2025

Consumers prefer still purified bottled water, while functional water gains ground

WHAT'S NEXT?

Retail volume sales of bottled water set to rise throughout forecast period

Wellness trends to play a pivotal role in shaping marketing strategies

Foodservice will remain important channel for bottled water in the Philippines

COMPETITIVE LANDSCAPE

Philippine Spring Water Resources leads bottled water in the Philippines

Coca-Cola holds strong with Wilkins brand in premium segment

CHANNELS

Small local grocers leads retail distribution

Convenience stores posts fastest rise

CATEGORY DATA

Table 37 - Off-trade Sales of Bottled Water by Category: Volume 2020-2025
Table 38 - Off-trade Sales of Bottled Water by Category: Value 2020-2025
Table 39 - Off-trade Sales of Bottled Water by Category: % Volume Growth 2020-2025
Table 40 - Off-trade Sales of Bottled Water by Category: % Value Growth 2020-2025
Table 41 - NBO Company Shares of Off-trade Bottled Water: % Volume 2021-2025
Table 42 - LBN Brand Shares of Off-trade Bottled Water: % Volume 2022-2025
Table 43 - NBO Company Shares of Off-trade Bottled Water: % Value 2021-2025
Table 44 - LBN Brand Shares of Off-trade Bottled Water: % Value 2022-2025
Table 45 - Forecast Off-trade Sales of Bottled Water by Category: Volume 2025-2030
Table 46 - Forecast Off-trade Sales of Bottled Water by Category: Value 2025-2030
Table 47 - Forecast Off-trade Sales of Bottled Water by Category: % Volume Growth 2025-2030
Table 48 - Forecast Off-trade Sales of Bottled Water by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

Carbonates in the Philippines

KEY DATA FINDINGS

2025 DEVELOPMENTS

Zero-sugar formats and affordability tactics lift carbonates in 2025

INDUSTRY PERFORMANCE

Retail value sales outpace volume sales growth in carbonates in 2025

Reduced sugar cola carbonates drives overall volume growth

WHAT'S NEXT?

Carbonates faces further solid growth for forecast period

Digital and tech advances to shape development and progress

Foodservice channel will continue as critical growth driver

COMPETITIVE LANDSCAPE

Coca-Cola remains overall leader as players invest in cross-industry innovation

Coca-Cola invests further in awareness and engagement

CHANNELS

Small local grocers remains key distribution channel in 2025

E-commerce enjoys fastest rise

CATEGORY DATA

Table 49 - Off-trade vs On-trade Sales of Carbonates: Volume 2020-2025

Table 50 - Off-trade vs On-trade Sales of Carbonates: Value 2020-2025

Table 51 - Off-trade vs On-trade Sales of Carbonates: % Volume Growth 2020-2025

Table 52 - Off-trade vs On-trade Sales of Carbonates: % Value Growth 2020-2025

Table 53 - Off-trade Sales of Carbonates by Category: Volume 2020-2025

Table 54 - Off-trade Sales of Carbonates by Category: Value 2020-2025

Table 55 - Off-trade Sales of Carbonates by Category: % Volume Growth 2020-2025

Table 56 - Off-trade Sales of Carbonates by Category: % Value Growth 2020-2025

Table 57 - Total Sales of Carbonates by Fountain On-trade: Volume 2020-2025

Table 58 - Total Sales of Carbonates by Fountain On-trade: % Volume Growth 2020-2025

Table 59 - NBO Company Shares of Off-trade Carbonates: % Volume 2021-2025

Table 60 - LBN Brand Shares of Off-trade Carbonates: % Volume 2022-2025

Table 61 - NBO Company Shares of Off-trade Carbonates: % Value 2021-2025

Table 62 - LBN Brand Shares of Off-trade Carbonates: % Value 2022-2025

Table 63 - Forecast Off-trade Sales of Carbonates by Category: Volume 2025-2030

Table 64 - Forecast Off-trade Sales of Carbonates by Category: Value 2025-2030

Table 65 - Forecast Off-trade Sales of Carbonates by Category: % Volume Growth 2025-2030

Table 66 - Forecast Off-trade Sales of Carbonates by Category: % Value Growth 2025-2030

Table 67 - Forecast Total Sales of Carbonates by Fountain On-trade: Volume 2025-2030

Table 68 - Forecast Total Sales of Carbonates by Fountain On-trade: % Volume Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

Concentrates in the Philippines

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

CATEGORY DATA

Table 69 - Off-trade Sales of Concentrates (RTD) by Category: Volume 2020-2025

Table 70 - Off-trade Sales of Concentrates (RTD) by Category: % Volume Growth 2020-2025

Table 71 - Off-trade Sales of Concentrates by Category: Value 2020-2025

Table 72 - Off-trade Sales of Concentrates by Category: % Value Growth 2020-2025

Table 73 - LBN Brand Shares of Off-trade Concentrates (RTD): % Volume 2022-2025

Table 74 - NBO Company Shares of Off-trade Concentrates: % Value 2021-2025

Table 75 - LBN Brand Shares of Off-trade Concentrates: % Value 2022-2025

Table 76 - NBO Company Shares of Off-trade Liquid Concentrates (RTD): % Volume 2021-2025

Table 77 - LBN Brand Shares of Off-trade Liquid Concentrates (RTD): % Volume 2022-2025

Table 78 - NBO Company Shares of Off-trade Powder Concentrates (RTD): % Volume 2021-2025

Table 79 - LBN Brand Shares of Off-trade Powder Concentrates (RTD): % Volume 2022-2025

Table 80 - Forecast Off-trade Sales of Concentrates (RTD) by Category: Volume 2025-2030

Table 81 - Forecast Off-trade Sales of Concentrates (RTD) by Category: % Volume Growth 2025-2030

Table 82 - Forecast Off-trade Sales of Concentrates by Category: Value 2025-2030

Table 83 - Forecast Off-trade Sales of Concentrates by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

[Juice in the Philippines](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Juice drinks leads growth as health cues gain weight

INDUSTRY PERFORMANCE

Strong value and volume growth for juice in 2025

Juice drinks shows greatest dynamism

WHAT'S NEXT?

Retail volume sales set to rise for juice in the Philippines

Health and wellness trends will accelerate, having greater impact on innovation

Rising competition from fresh juice and smoothie chains operating through foodservice channels

COMPETITIVE LANDSCAPE

Del Monte maintains overall leadership

Coca-Cola beverages enjoys rapid rises in 2025

CHANNELS

Small local grocers as primary distribution channel

Forecourt retailers benefits from convenience demand

CATEGORY DATA

Table 84 - Off-trade Sales of Juice by Category: Volume 2020-2025

Table 85 - Off-trade Sales of Juice by Category: Value 2020-2025

Table 86 - Off-trade Sales of Juice by Category: % Volume Growth 2020-2025

Table 87 - Off-trade Sales of Juice by Category: % Value Growth 2020-2025

Table 88 - NBO Company Shares of Off-trade Juice: % Volume 2021-2025

Table 89 - LBN Brand Shares of Off-trade Juice: % Volume 2022-2025

Table 90 - NBO Company Shares of Off-trade Juice: % Value 2021-2025

Table 91 - LBN Brand Shares of Off-trade Juice: % Value 2022-2025

Table 92 - Forecast Off-trade Sales of Juice by Category: Volume 2025-2030

Table 93 - Forecast Off-trade Sales of Juice by Category: Value 2025-2030

Table 94 - Forecast Off-trade Sales of Juice by Category: % Volume Growth 2025-2030

Table 95 - Forecast Off-trade Sales of Juice by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

RTD Coffee in the Philippines

KEY DATA FINDINGS

2025 DEVELOPMENTS

RTD coffee expands on convenience, with premium imports adding momentum

INDUSTRY PERFORMANCE

RTD coffee sees strong growth in both volume and value terms in 2025

Premiumisation drives growth in imported RTD coffee

WHAT'S NEXT?

Continued steady growth forecast for RTD coffee in the Philippines

Category players may reposition products to capture growth through premiumisation

Sustainability concerns increasingly shape sourcing and brand positioning

COMPETITIVE LANDSCAPE

Tirta Fresindo Jaya leads thanks to Kopiko Lucky Day brand

Convenience trends supports Nestlé's continued rise within RTD coffee in the Philippines

CHANNELS

Supermarkets channel benefits from competitive pricing and bulk offerings

Persistent digitalisation fuels e-commerce expansion

CATEGORY DATA

Table 96 - Off-trade Sales of RTD Coffee: Volume 2020-2025

Table 97 - Off-trade Sales of RTD Coffee: Value 2020-2025

Table 98 - Off-trade Sales of RTD Coffee: % Volume Growth 2020-2025

Table 99 - Off-trade Sales of RTD Coffee: % Value Growth 2020-2025

Table 100 - NBO Company Shares of Off-trade RTD Coffee: % Volume 2021-2025

Table 101 - LBN Brand Shares of Off-trade RTD Coffee: % Volume 2022-2025

Table 102 - NBO Company Shares of Off-trade RTD Coffee: % Value 2021-2025

Table 103 - LBN Brand Shares of Off-trade RTD Coffee: % Value 2022-2025

Table 104 - Forecast Off-trade Sales of RTD Coffee: Volume 2025-2030

Table 105 - Forecast Off-trade Sales of RTD Coffee: Value 2025-2030

Table 106 - Forecast Off-trade Sales of RTD Coffee: % Volume Growth 2025-2030

Table 107 - Forecast Off-trade Sales of RTD Coffee: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

RTD Tea in the Philippines

KEY DATA FINDINGS

2025 DEVELOPMENTS

Reduced sugar variants keep RTD tea on a strong growth path

INDUSTRY PERFORMANCE

Retail volume and value sales are rising for RTD tea in the Philippines

Reduced sugar variants drive growth in still RTD tea

WHAT'S NEXT?

Further growth forecast for RTD tea as players invest in production and promotions

Digital tools drive targeted campaigns, traditional in-person activations remain essential for building consumer trust and engagement

Health and wellness concerns will continue to influence consumer choices

COMPETITIVE LANDSCAPE

Universal Robina leads overall RTD tea, while Coca-Cola increases product variety

Nestea bolsters Nestlé's performance through marketing initiatives

CHANNELS

Supermarkets leads distribution thanks to broad array and favourable prices

E-commerce benefits from bulk-buying habits

CATEGORY DATA

Table 108 - Off-trade Sales of RTD Tea by Category: Volume 2020-2025

Table 109 - Off-trade Sales of RTD Tea by Category: Value 2020-2025

Table 110 - Off-trade Sales of RTD Tea by Category: % Volume Growth 2020-2025

Table 111 - Off-trade Sales of RTD Tea by Category: % Value Growth 2020-2025

Table 112 - Leading Flavours for Off-trade RTD Tea: % Volume 2020-2025

Table 113 - NBO Company Shares of Off-trade RTD Tea: % Volume 2021-2025

Table 114 - LBN Brand Shares of Off-trade RTD Tea: % Volume 2022-2025

Table 115 - NBO Company Shares of Off-trade RTD Tea: % Value 2021-2025

Table 116 - LBN Brand Shares of Off-trade RTD Tea: % Value 2022-2025

Table 117 - Forecast Off-trade Sales of RTD Tea by Category: Volume 2025-2030

Table 118 - Forecast Off-trade Sales of RTD Tea by Category: Value 2025-2030

Table 119 - Forecast Off-trade Sales of RTD Tea by Category: % Volume Growth 2025-2030

Table 120 - Forecast Off-trade Sales of RTD Tea by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

Energy Drinks in the Philippines

KEY DATA FINDINGS

2025 DEVELOPMENTS

Value-led leaders hold ground as reduced sugar grows

INDUSTRY PERFORMANCE

Energy drinks registers stable growth driven by demand for quick energy boosts amid busy lifestyles
Consumers shift towards reduced sugar options

WHAT'S NEXT?

Retail volume sales set to rise steadily during forecast period
Digital innovation will increasingly marketing strategies
Health and wellness trends will remain key to innovation

COMPETITIVE LANDSCAPE

Asia Brewery continues to lead in 2025
Monster Beverage sees fastest growth

CHANNELS

Small local grocers as primary channel for energy drinks purchases
Mobile shopping trend supports e-commerce expansion

CATEGORY DATA

Table 121 - Off-trade Sales of Energy Drinks: Volume 2020-2025
Table 122 - Off-trade Sales of Energy Drinks: Value 2020-2025
Table 123 - Off-trade Sales of Energy Drinks: % Volume Growth 2020-2025
Table 124 - Off-trade Sales of Energy Drinks: % Value Growth 2020-2025
Table 125 - NBO Company Shares of Off-trade Energy Drinks: % Volume 2021-2025
Table 126 - LBN Brand Shares of Off-trade Energy Drinks: % Volume 2022-2025
Table 127 - NBO Company Shares of Off-trade Energy Drinks: % Value 2021-2025
Table 128 - LBN Brand Shares of Off-trade Energy Drinks: % Value 2022-2025
Table 129 - Forecast Off-trade Sales of Energy Drinks: Volume 2025-2030
Table 130 - Forecast Off-trade Sales of Energy Drinks: Value 2025-2030
Table 131 - Forecast Off-trade Sales of Energy Drinks: % Volume Growth 2025-2030
Table 132 - Forecast Off-trade Sales of Energy Drinks: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

[Sports Drinks in the Philippines](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Innovation shifts to powders as sports drinks growth stays modest

INDUSTRY PERFORMANCE

Sports drinks sees continued volume growth in 2025
Regular sports drinks prove more popular than healthier variants

WHAT'S NEXT?

Sports drinks anticipated to see steady growth supported by prevailing health trends
Health and wellness focus will shape marketing strategies
Sustainability to remain key influence on production and brand positioning

COMPETITIVE LANDSCAPE

Pepsi-Cola Products maintains category leadership
Coca-Cola Beverages focuses on Powerade brand as SIP Plus aims to shake up the landscape

CHANNELS

Supermarkets as preferred distribution channel for sports drinks

E-commerce benefits from broad offer and home deliveries

CATEGORY DATA

Table 133 - Off-trade Sales of Sports Drinks: Volume 2020-2025

Table 134 - Off-trade Sales of Sports Drinks: Value 2020-2025

Table 135 - Off-trade Sales of Sports Drinks: % Volume Growth 2020-2025

Table 136 - Off-trade Sales of Sports Drinks: % Value Growth 2020-2025

Table 137 - NBO Company Shares of Off-trade Sports Drinks: % Volume 2021-2025

Table 138 - LBN Brand Shares of Off-trade Sports Drinks: % Volume 2022-2025

Table 139 - NBO Company Shares of Off-trade Sports Drinks: % Value 2021-2025

Table 140 - LBN Brand Shares of Off-trade Sports Drinks: % Value 2022-2025

Table 141 - Forecast Off-trade Sales of Sports Drinks: Volume 2025-2030

Table 142 - Forecast Off-trade Sales of Sports Drinks: Value 2025-2030

Table 143 - Forecast Off-trade Sales of Sports Drinks: % Volume Growth 2025-2030

Table 144 - Forecast Off-trade Sales of Sports Drinks: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

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/soft-drinks-in-the-philippines/report.