



# Carbonates in the Philippines

December 2025

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## 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

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### KEY DATA FINDINGS

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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

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