



Euromonitor
International

Soft Drinks in Qatar

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EXECUTIVE SUMMARY

Soft drinks sales rise as health-led choices shape everyday purchasing

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Demand expands across hydration and lower-sugar options

Local manufacturing expansion and food security policies

Affordability drives growth even in a high-income country

Digital-first product development shapes trial as modern logistics and delivery infrastructure widen access

Strict controls limit illicit trade, and premium specialist retail attracts affluent consumers

WHAT'S NEXT?

Soft drinks faces further growth for forecast period

Competition to intensify as local brands expand and multinationals defend core categories

Tech-enabled routes reshape distribution as delivery platforms deepen reach

COMPETITIVE LANDSCAPE

Al Rabban Holding leads, while Coca-Cola benefits from brand equity and cross-channel visibility

Baladna drives growth as local manufacturing expands into cold drinks

CHANNELS

Small local grocers leads, while modern grocery anchors bulk purchasing

E-commerce grows fastest, while convenience formats strengthen immediate consumption

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COUNTRY REPORTS DISCLAIMER

CARBONATES

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2025 Developments

Volume sales rise in 2025, with consumers showing greater interest reduced-sugar options

Industry Performance

Refreshment consumption drives growth in hot climate

Regulatory pressure shifts demand towards lower-sugar choices

Wider flavour choice, more local presence and money matters reshape category dynamics

What's Next?

Volume growth set to continue, fuelled by demographics and retail expansion

Digital transformation reshapes marketing and distribution

Regulation and health awareness to accelerate reformulation and portfolio shifts

Competitive Landscape

Global leaders anchor demand through scale and local production

Regional and local challengers gain traction, led by Kinza

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Industry Performance

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Product mix skews towards nectars and juice drinks as price caps premium adoption

Convenience formats and foodservice occasions extend consumption beyond the home

Regulation shapes development, while local production supports category growth

What's Next?

Strong demand forecast thanks to health-led choices and hot weather

Domestic manufacturing to expand, reinforcing leadership of local producers

Digital visibility will improve access and accelerate competitive intensity

Competitive Landscape

Baladna leads through local scale and portfolio expansion

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BOTTLED WATER

Key Data Findings

2025 Developments

Everyday hydration needs keep bottled water purchases frequent in Qatar

Industry Performance

Consumers choose bottled water over tap water despite safe supply

Carbonated and flavoured bottled water gain traction through premium and wellness cues

Local production anchors supply under strong regulation, with export opportunities emerging

What's Next?

Rising tourism and event-led consumption ensure further growth for bottled water

Digital-first distribution to expand through subscriptions, bulk ordering and smart vending

Sustainability and innovation raise differentiation, with premium niches still available

Competitive Landscape

Rayyan anchors leadership through domestic scale and institutional endorsement

Premium imports gain momentum in niche channels, led by Evian

Channels

Small local grocers leads, with modern grocery driving bulk volume

E-commerce grows through delivery convenience and subscription models

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SPORTS DRINKS

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Industry Performance

Sports culture and gym expansion raise awareness and trial

Brand-led growth meets stronger demand for healthier formulations

Consumption stays niche and skewed towards higher-income male users

What's next?

Event hosting and wellness priorities to sustain category momentum

Clean-label reformulation will become more prominent

Wider distribution and digital engagement set to expand reach

Competitive Landscape

Gatorade dominates through distribution reach and functional positioning

Pocari Sweat builds foothold from a low base

Channels

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ENERGY DRINKS

Key Data Findings

2025 Developments

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Industry Performance

Demand accelerates thanks active lifestyles and sports events

Sugar-free lines drive growth as brands adapt to health scrutiny

Energy drinks appeal mostly to young male Qataris, with price limiting broader penetration

What's Next?

Population trends and tourism should strengthen baseline demand

Product reformulation and digital marketing to sharpen competition

Tech-enabled distribution will access despite regulatory constraints

Competitive Landscape

Red Bull leads through premium equity and event-led marketing

Monster gains momentum thanks to variety and youth positioning

Channels

Small local grocers leads while modern grocery benefits from bulk purchasing

E-commerce grows fastest through bundles and rapid delivery

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Industry Performance

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Flavour preferences reflect cultural mix

A mature category with selective extensions

What's Next?

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Portfolio changes to follow health priorities

Digital promotion will increase reach

Competitive Landscape

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Channels

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Product variety and health cues widen trial

Premium pricing keeps the category niche

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Foodservice visibility improves RTD coffee's premium image

Better-for-you options attract attention

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Digital access to strengthen purchase frequency

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Competitive Landscape

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Challenger brands widen choice through value and familiarity

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