



Euromonitor
International

Soft Drinks in the Middle East and Africa

July 2025

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INTRODUCTION

Key findings

REGIONAL OVERVIEW

Hot climate, population growth and local brands drive regional soft drinks growth
Steady growth persists, with occasional slowdowns driven by local challenges
Consumer habits and affordability drive the leadership of key categories
Bottled water and carbonates see strong growth across West and Southern Africa
Energy drinks and RTD coffee are growing, from a small base
Some soft drink categories declined, due to politics, economic issues and global crises
Carbonates fell in Egypt, Jordan, Morocco and Lebanon, amid boycotts and crises
Small grocers lead due to tradition and low-budget daily consumer shopping habits
Modern retail and e-commerce grow, driven by promotions, variety and convenience

LEADING COMPANIES AND BRANDS

Soft drinks in MEA are mostly consolidated, with local brands gaining share
Local, affordable innovative alternatives pushing out established international brands
Localised strategies and innovation drive success for beverage leaders in key markets
Bel Aqua Rises in Ghana while Western-linked brands decline

FORECAST PROJECTIONS

Nigeria and Iraq will lead growth, driven by growing populations and economic recovery
Egypt, Ghana and Saudi Arabia will grow via local brands and innovation

COUNTRY SNAPSHOTS

Algeria: Market context
Algeria: Competitive and retail landscape
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United Arab Emirates: Competitive and retail landscape

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