



**Euromonitor
International**

The Trillion Litre Channel: Winning Soft Drinks in Traditional Trade

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EXECUTIVE SUMMARY

The Trillion Litre Channel: Winning Soft Drinks in Traditional Trade

Key findings

INTRODUCTION

By 2030, global soft drinks reach one trillion litres sold, but with a new epicentre

Traditional trade shapes success in four important high-growth markets

How we analysed traditional trade shelves

The road to a trillion litres of soft drinks volume flows through Africa and Asia

India, Nigeria & China will drive growth towards a trillion global litres by 2030

India's Diet Coke shortage: a case study of misaligned mix in a high growth market

The next 153 billion litres will be harder to monetise

A profitability gap, but unmatched drinks 'market potential' long term

Finding the young, social, future families of food & beverage

High growth markets fall short of the "\$10,000 threshold" for consumption

Bridging the affordability gap is critical to volume growth

The battleground for future volume is the traditional small local grocer

NIGERIA: DEMOGRAPHIC POTENTIAL MEETS AFFORDABILITY

Nigeria market profile: 590,000 small grocers, but severe affordability constraints

Shelf analysis findings for Nigeria: Coca-Cola dominance with rising local options

American Cola and the rise of affordable, local hero brands in emerging markets

Affordability constraints mount across food and beverage after fuel subsidy removal

Nigeria's unmatched demographic headroom

Nigeria: Affordability is the price of entry, so win small, single-serve and digital

COLOMBIA: PORTFOLIO BREADTH WINS THE SHELF

Colombia market profile: traditional trade remains central as soft drinks demand resets

Shelf analysis findings for Colombia: Postobón wins through portfolio breadth

Hidralyte's value challenge to Electrolit runs into a fight over category imitation

Colombia's health tax is reshaping price, formulation and channel strategy

Colombia's proximity channel is fragmenting rather than simply modernising

Hybrid distribution preserves mass reach while opening new routes to premium growth

Colombia: Local heroes prove that shelf breadth beats brand equity alone

INDIA: AFFORDABILITY UNLOCKS MASS CONSUMPTION

India market profile: extraordinary potential, but a highly price-sensitive route to growth

Sting and the democratisation of energy drinks

Sting shows price-pack architecture can create both access and habitual consumption

Quick commerce is forcing kiranas and manufacturers to redefine their roles

GST cuts reinforce India's rising importance in global drinks outlook

Affordable reach will define India's long-term soft drinks growth

India: Quick commerce is forcing a two-speed channel strategy on brands

INDONESIA: WINNING THROUGH THE WARUNG

Indonesia market profile: vast traditional reach, but limited near-term volume

Sido Muncul built mass-market energy around local formats and distribution

Warungs compete through flexibility, proximity and a much broader service role

Sido Muncul built mass-market energy around local formats and distribution

Minimarket expansion and digital commerce are modernising proximity retail

Affordability innovation must work across packs, channels and islands

Indonesia: Warungs still rule, but e-commerce is rewriting the rules fast

CONCLUSION

Future drinks growth depends on winning the hardest channel
Digitising traditional trade is the opportunity that quick commerce has exposed
Bottlers and brands are reshaping their systems to win in fragmented channels
From shelf to shopper: why local brands can win beyond price

CONCLUSION

Recommendations/Opportunities for growth
Evolution of Soft Drinks in Traditional Trade
Questions we are asking

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