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
WINGS Food's AQUVIVA won warung share with bigger packs and retailer rewards
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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