



Soft Drinks in the United Arab Emirates

December 2022

Table of Contents

Soft Drinks in the United Arab Emirates

EXECUTIVE SUMMARY

Soft drinks in 2022: The big picture

2022 key trends

Competitive landscape

Retailing developments

Foodservice vs retail split

What next for soft drinks?

MARKET DATA

Table 1 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2017-2022

Table 2 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2017-2022

Table 3 - Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2017-2022

Table 4 - Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2017-2022

Table 5 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: Volume 2021

Table 6 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: % Volume 2021

Table 7 - Off-trade vs On-trade Sales of Soft Drinks by Category: Value 2021

Table 8 - Off-trade vs On-trade Sales of Soft Drinks by Category: % Value 2021

Table 9 - Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2017-2022

Table 10 - Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2017-2022

Table 11 - Off-trade Sales of Soft Drinks by Category: Value 2017-2022

Table 12 - Off-trade Sales of Soft Drinks by Category: % Value Growth 2017-2022

Table 13 - Sales of Soft Drinks by Total Fountain On-trade: Volume 2017-2022

Table 14 - Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2017-2022

Table 15 - NBO Company Shares of Off-trade Soft Drinks (RTD): % Volume 2018-2022

Table 16 - LBN Brand Shares of Off-trade Soft Drinks (RTD): % Volume 2019-2022

Table 17 - NBO Company Shares of Off-trade Soft Drinks: % Value 2018-2022

Table 18 - LBN Brand Shares of Off-trade Soft Drinks: % Value 2019-2022

Table 19 - Distribution of Off-trade Soft Drinks (as sold) by Format: % Volume 2017-2022

Table 20 - Distribution of Off-trade Soft Drinks (as sold) by Format and Category: % Volume 2022

Table 21 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2022-2027

Table 22 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2022-2027

Table 23 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2022-2027

Table 24 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2022-2027

Table 25 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2022-2027

Table 26 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2022-2027

Table 27 - Forecast Off-trade Sales of Soft Drinks by Category: Value 2022-2027

Table 28 - Forecast Off-trade Sales of Soft Drinks by Category: % Value Growth 2022-2027

Table 29 - Forecast Sales of Soft Drinks by Total Fountain On-trade: Volume 2022-2027

Table 30 - Forecast Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2022-2027

APPENDIX

Fountain sales in the United Arab Emirates

DISCLAIMER

SOURCES

Summary 1 - Research Sources

[Bottled Water in the United Arab Emirates](#)

KEY DATA FINDINGS

2022 DEVELOPMENTS

Solid growth for bottled water despite rising cost of raw materials and inflationary pressures driving up off-trade costs
Bulk water most dynamic format, while greater mobility drives demand for smaller bottles due to return of on-the-go consumption
Retail e-commerce is on the rise with players' own platforms playing a major role

PROSPECTS AND OPPORTUNITIES

Emerging bottled water types to offer greater competition to other soft drinks
Sustainability practices will continue to be addressed by bottled water players
Price-conscious decisions will impact the future of bottled water

CATEGORY DATA

Table 31 - Off-trade Sales of Bottled Water by Category: Volume 2017-2022
Table 32 - Off-trade Sales of Bottled Water by Category: Value 2017-2022
Table 33 - Off-trade Sales of Bottled Water by Category: % Volume Growth 2017-2022
Table 34 - Off-trade Sales of Bottled Water by Category: % Value Growth 2017-2022
Table 35 - NBO Company Shares of Off-trade Bottled Water: % Volume 2018-2022
Table 36 - LBN Brand Shares of Off-trade Bottled Water: % Volume 2019-2022
Table 37 - NBO Company Shares of Off-trade Bottled Water: % Value 2018-2022
Table 38 - LBN Brand Shares of Off-trade Bottled Water: % Value 2019-2022
Table 39 - Forecast Off-trade Sales of Bottled Water by Category: Volume 2022-2027
Table 40 - Forecast Off-trade Sales of Bottled Water by Category: Value 2022-2027
Table 41 - Forecast Off-trade Sales of Bottled Water by Category: % Volume Growth 2022-2027
Table 42 - Forecast Off-trade Sales of Bottled Water by Category: % Value Growth 2022-2027

Carbonates in the United Arab Emirates

KEY DATA FINDINGS

2022 DEVELOPMENTS

On-trade volume sales of carbonates experience solid growth in 2022
Innovation is main priority for leading players
Pepsi-Cola and The Coca-Cola Co retain dominance of carbonates

PROSPECTS AND OPPORTUNITIES

Innovation focus will continue to drive category forward
Supply chain issues and cost rationalisation are likely to be high on the agenda
Carbonates with healthier or sustainable positioning set to see increasing demand

CATEGORY DATA

Table 43 - Off-trade vs On-trade Sales of Carbonates: Volume 2017-2022
Table 44 - Off-trade vs On-trade Sales of Carbonates: Value 2017-2022
Table 45 - Off-trade vs On-trade Sales of Carbonates: % Volume Growth 2017-2022
Table 46 - Off-trade vs On-trade Sales of Carbonates: % Value Growth 2017-2022
Table 47 - Off-trade Sales of Carbonates by Category: Volume 2017-2022
Table 48 - Off-trade Sales of Carbonates by Category: Value 2017-2022
Table 49 - Off-trade Sales of Carbonates by Category: % Volume Growth 2017-2022
Table 50 - Off-trade Sales of Carbonates by Category: % Value Growth 2017-2022
Table 51 - Total Sales of Carbonates by Fountain On-trade: Volume 2017-2022
Table 52 - Total Sales of Carbonates by Fountain On-trade: % Volume Growth 2017-2022
Table 53 - NBO Company Shares of Off-trade Carbonates: % Volume 2018-2022
Table 54 - LBN Brand Shares of Off-trade Carbonates: % Volume 2019-2022
Table 55 - NBO Company Shares of Off-trade Carbonates: % Value 2018-2022
Table 56 - LBN Brand Shares of Off-trade Carbonates: % Value 2019-2022

Table 57 - Forecast Off-trade Sales of Carbonates by Category: Volume 2022-2027

Table 58 - Forecast Off-trade Sales of Carbonates by Category: Value 2022-2027

Table 59 - Forecast Off-trade Sales of Carbonates by Category: % Volume Growth 2022-2027

Table 60 - Forecast Off-trade Sales of Carbonates by Category: % Value Growth 2022-2027

Table 61 - Forecast Total Sales of Carbonates by Fountain On-trade: Volume 2022-2027

Table 62 - Forecast Total Sales of Carbonates by Fountain On-trade: % Volume Growth 2022-2027

Concentrates in the United Arab Emirates

KEY DATA FINDINGS

2022 DEVELOPMENTS

Demand for powder concentrates remains stable in 2022 as affordable option in face of inflationary pressures

Private label is gaining space on retailers' shelves

Price advantage give concentrates a competitive edge

PROSPECTS AND OPPORTUNITIES

Health and wellness trend and functionality likely to be drivers of innovation in concentrates

Ramadan to remain peak demand period for concentrates

Pricing likely to be key factor driving demand

CATEGORY DATA

Concentrates Conversions

Summary 2 - Concentrates Conversion Factors for Ready-to-Drink (RTD) Format

Table 63 - Off-trade Sales of Concentrates (RTD) by Category: Volume 2017-2022

Table 64 - Off-trade Sales of Concentrates (RTD) by Category: % Volume Growth 2017-2022

Table 65 - Off-trade Sales of Concentrates by Category: Value 2017-2022

Table 66 - Off-trade Sales of Concentrates by Category: % Value Growth 2017-2022

Table 67 - LBN Brand Shares of Off-trade Concentrates (RTD): % Volume 2019-2022

Table 68 - NBO Company Shares of Off-trade Concentrates: % Value 2018-2022

Table 69 - LBN Brand Shares of Off-trade Concentrates: % Value 2019-2022

Table 70 - NBO Company Shares of Off-trade Liquid Concentrates (RTD): % Volume 2018-2022

Table 71 - LBN Brand Shares of Off-trade Liquid Concentrates (RTD): % Volume 2019-2022

Table 72 - NBO Company Shares of Off-trade Powder Concentrates (RTD): % Volume 2018-2022

Table 73 - LBN Brand Shares of Off-trade Powder Concentrates (RTD): % Volume 2019-2022

Table 74 - Forecast Off-trade Sales of Concentrates (RTD) by Category: Volume 2022-2027

Table 75 - Forecast Off-trade Sales of Concentrates (RTD) by Category: % Volume Growth 2022-2027

Table 76 - Forecast Off-trade Sales of Concentrates by Category: Value 2022-2027

Table 77 - Forecast Off-trade Sales of Concentrates by Category: % Value Growth 2022-2027

Juice in the United Arab Emirates

KEY DATA FINDINGS

2022 DEVELOPMENTS

Expanding population, at-home occasions, and the rise of on-the-go consumption favour juice sales in 2022

Supply chain challenges hinder juice brands in 2022

Functionality continues to drive growth and innovation

PROSPECTS AND OPPORTUNITIES

Sustainability will be a key topic on the agenda moving forward

Vegetables, plants and other alternative ingredients to emerge in juice

Healthier variants and functionality will remain key for players over the forecast period

CATEGORY DATA

Table 78 - Off-trade Sales of Juice by Category: Volume 2017-2022
Table 79 - Off-trade Sales of Juice by Category: Value 2017-2022
Table 80 - Off-trade Sales of Juice by Category: % Volume Growth 2017-2022
Table 81 - Off-trade Sales of Juice by Category: % Value Growth 2017-2022
Table 82 - NBO Company Shares of Off-trade Juice: % Volume 2018-2022
Table 83 - LBN Brand Shares of Off-trade Juice: % Volume 2019-2022
Table 84 - NBO Company Shares of Off-trade Juice: % Value 2018-2022
Table 85 - LBN Brand Shares of Off-trade Juice: % Value 2019-2022
Table 86 - Forecast Off-trade Sales of Juice by Category: Volume 2022-2027
Table 87 - Forecast Off-trade Sales of Juice by Category: Value 2022-2027
Table 88 - Forecast Off-trade Sales of Juice by Category: % Volume Growth 2022-2027
Table 89 - Forecast Off-trade Sales of Juice by Category: % Value Growth 2022-2027

RTD Coffee in the United Arab Emirates

KEY DATA FINDINGS

2022 DEVELOPMENTS

Greater return to normality and impulse-driven consumption drive up demand for RTD coffee in 2022
Local consumers seek on-the-go stimulant effect
Starbucks Frappuccino strengthens leadership despite new players entering

PROSPECTS AND OPPORTUNITIES

Positive outlook for RTD coffee in the United Arab Emirates
Competition likely to intensify over forecast period due to further growth potential
New product development will revolve around health and wellness in coming years

CATEGORY DATA

Table 90 - Off-trade Sales of RTD Coffee: Volume 2017-2022
Table 91 - Off-trade Sales of RTD Coffee: Value 2017-2022
Table 92 - Off-trade Sales of RTD Coffee: % Volume Growth 2017-2022
Table 93 - Off-trade Sales of RTD Coffee: % Value Growth 2017-2022
Table 94 - NBO Company Shares of Off-trade RTD Coffee: % Volume 2018-2022
Table 95 - LBN Brand Shares of Off-trade RTD Coffee: % Volume 2019-2022
Table 96 - NBO Company Shares of Off-trade RTD Coffee: % Value 2018-2022
Table 97 - LBN Brand Shares of Off-trade RTD Coffee: % Value 2019-2022
Table 98 - Forecast Off-trade Sales of RTD Coffee: Volume 2022-2027
Table 99 - Forecast Off-trade Sales of RTD Coffee: Value 2022-2027
Table 100 - Forecast Off-trade Sales of RTD Coffee: % Volume Growth 2022-2027
Table 101 - Forecast Off-trade Sales of RTD Coffee: % Value Growth 2022-2027

RTD Tea in the United Arab Emirates

KEY DATA FINDINGS

2022 DEVELOPMENTS

Off-trade demand driven by return of on-the-go consumption occasions
Lipton retains lead, but innovative new players offer rising competition
High promotional activity in an attempt to retain consumers

PROSPECTS AND OPPORTUNITIES

Overall demand for healthier or functional products will ensure future demand for RTD tea
Growth potential for carbonated RTD tea and kombucha over forecast period
Sustainability and packaging will be other innovation drivers

CATEGORY DATA

Table 102 - Off-trade Sales of RTD Tea by Category: Volume 2017-2022

Table 103 - Off-trade Sales of RTD Tea by Category: Value 2017-2022

Table 104 - Off-trade Sales of RTD Tea by Category: % Volume Growth 2017-2022

Table 105 - Off-trade Sales of RTD Tea by Category: % Value Growth 2017-2022

Table 106 - Leading Flavours for Off-trade RTD Tea: % Volume 2017-2022

Table 107 - NBO Company Shares of Off-trade RTD Tea: % Volume 2018-2022

Table 108 - LBN Brand Shares of Off-trade RTD Tea: % Volume 2019-2022

Table 109 - NBO Company Shares of Off-trade RTD Tea: % Value 2018-2022

Table 110 - LBN Brand Shares of Off-trade RTD Tea: % Value 2019-2022

Table 111 - Forecast Off-trade Sales of RTD Tea by Category: Volume 2022-2027

Table 112 - Forecast Off-trade Sales of RTD Tea by Category: Value 2022-2027

Table 113 - Forecast Off-trade Sales of RTD Tea by Category: % Volume Growth 2022-2027

Table 114 - Forecast Off-trade Sales of RTD Tea by Category: % Value Growth 2022-2027

Energy Drinks in the United Arab Emirates

KEY DATA FINDINGS

2022 DEVELOPMENTS

Return of on-the go sales and a young population support demand for energy drinks in 2022

Reduced sugar variants gain traction

Red Bull retains leadership amid intensifying competition

PROSPECTS AND OPPORTUNITIES

Functional and reduced sugar variants likely to enjoy further consumer interest

Players must weigh up innovation and cost rationalisation heading into 2023

Stable demand due to rising population and inbound visitor numbers

CATEGORY DATA

Table 115 - Off-trade Sales of Energy Drinks: Volume 2017-2022

Table 116 - Off-trade Sales of Energy Drinks: Value 2017-2022

Table 117 - Off-trade Sales of Energy Drinks: % Volume Growth 2017-2022

Table 118 - Off-trade Sales of Energy Drinks: % Value Growth 2017-2022

Table 119 - NBO Company Shares of Off-trade Energy Drinks: % Volume 2018-2022

Table 120 - LBN Brand Shares of Off-trade Energy Drinks: % Volume 2019-2022

Table 121 - NBO Company Shares of Off-trade Energy Drinks: % Value 2018-2022

Table 122 - LBN Brand Shares of Off-trade Energy Drinks: % Value 2019-2022

Table 123 - Forecast Off-trade Sales of Energy Drinks: Volume 2022-2027

Table 124 - Forecast Off-trade Sales of Energy Drinks: Value 2022-2027

Table 125 - Forecast Off-trade Sales of Energy Drinks: % Volume Growth 2022-2027

Table 126 - Forecast Off-trade Sales of Energy Drinks: % Value Growth 2022-2027

Sports Drinks in the United Arab Emirates

KEY DATA FINDINGS

2022 DEVELOPMENTS

Off-trade volume sales of sports drinks stabilise following 2021's decline in line with greater resumption of activities

Rise of functional soft drinks presents stronger competition to sport drinks

Pepsi-Cola International maintains lead, while retail offline continues to dominate distribution

PROSPECTS AND OPPORTUNITIES

Sports drinks to continue catering for niche demand with innovative and natural ingredients likely to help support stable demand

Limited options for reduced sugar sports drinks can create opportunities
Alternative hydration solutions will continue to eat into sales of sports drinks

CATEGORY DATA

Table 127 - Off-trade Sales of Sports Drinks: Volume 2017-2022

Table 128 - Off-trade Sales of Sports Drinks: Value 2017-2022

Table 129 - Off-trade Sales of Sports Drinks: % Volume Growth 2017-2022

Table 130 - Off-trade Sales of Sports Drinks: % Value Growth 2017-2022

Table 131 - NBO Company Shares of Off-trade Sports Drinks: % Volume 2018-2022

Table 132 - LBN Brand Shares of Off-trade Sports Drinks: % Volume 2019-2022

Table 133 - NBO Company Shares of Off-trade Sports Drinks: % Value 2018-2022

Table 134 - LBN Brand Shares of Off-trade Sports Drinks: % Value 2019-2022

Table 135 - Forecast Off-trade Sales of Sports Drinks: Volume 2022-2027

Table 136 - Forecast Off-trade Sales of Sports Drinks: Value 2022-2027

Table 137 - Forecast Off-trade Sales of Sports Drinks: % Volume Growth 2022-2027

Table 138 - Forecast Off-trade Sales of Sports Drinks: % Value Growth 2022-2027

About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/soft-drinks-in-the-united-arab-emirates/report.