



Carbonates in the Philippines

December 2025

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KEY DATA FINDINGS

2025 DEVELOPMENTS

Zero-sugar formats and affordability tactics lift carbonates in 2025

INDUSTRY PERFORMANCE

Retail value sales outpace volume sales growth in carbonates in 2025

Reduced sugar cola carbonates drives overall volume growth

WHAT'S NEXT?

Carbonates faces further solid growth for forecast period

Digital and tech advances to shape development and progress

Foodservice channel will continue as critical growth driver

COMPETITIVE LANDSCAPE

Coca-Cola remains overall leader as players invest in cross-industry innovation

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INDUSTRY PERFORMANCE

Retail value sales rise amid stabilising prices

Affordability concerns prompt players to focus on cost to consumers

Health and wellness trends remain critical to development

WHAT'S NEXT?

Digital and technological advancements to support further growth and development

Increased competitive threat from foodservice

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