



Euromonitor
International

Soft Drinks in Angola

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EXECUTIVE SUMMARY

Growth of soft drinks sales in 2025 though demand is hampered by soaring inflation

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

More consumers turn to value packaging

Consumers are becoming increasingly health-conscious

Government intensifies its efforts to strengthen the local supply chain in juice

WHAT'S NEXT?

Forecast period sales driven by urbanisation and a growing young consumer base

Industry players respond to growing consumer health consciousness through the launch of innovative products

The development of modern grocery retailers and retail e-commerce widens consumer access to soft drinks

COMPETITIVE LANDSCAPE

Refriango Lda remains a strong player in soft drinks

Yala continues to challenge Refriango's position by targeting young consumers

CHANNELS

Small local grocers prevails in the distribution of soft drinks

Modern grocery retailers register the strongest growth

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COUNTRY REPORTS DISCLAIMER

CARBONATES

Key Data Findings

2025 Developments

Demand for carbonates continues to rise despite inflationary pressures

Industry Performance

Urban dwellers remain the most common consumers of carbonates

Growing health and wellness trend limits growth of carbonates

What's Next?

Demand for carbonates benefits from improvement in economic conditions

Regional expansion plans enable Refriango to scale up its activities

Wider distribution of carbonates boosts consumer access

Competitive Landscape

Refriango continues to lead carbonates

Castel Groupe achieves the strongest growth

Channels

Small grocers dominates distribution

Retail e-commerce benefits from the expansion of supermarkets and their omni-channels

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Industry Performance

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Reconstituted 100% juice remains popular with traditional drinks posing no significant threat

What's Next?

Government initiatives continue boosting local processing capabilities

Labelling becomes an increasingly important differentiating tool especially among premium offerings

Ongoing domination of domestic brands though scope exists for their imported counterparts

Competitive Landscape

Refriango benefits from its strategic repositioning

Sumol+Compal registers the strongest growth

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Rising health concerns boost demand in urban areas

Industry Performance

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Local players are ubiquitous and are being encouraged to switch from PET to glass packaging

What's Next?

Demand for bottled water benefits from the wellness trend

Sustainability shapes bottled water packaging

Population expansion and growing interest in health and wellness boost demand for bottled water

Competitive Landscape

Refriango continues to lead in bottled water

Nutre Angola records the strongest growth

Channels

Small local grocers continues to lead distribution

Supermarkets achieves the strongest growth

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Industry Performance

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Functional beverages and health needs drive premium growth

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Competitive Landscape

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Key Data Findings

2025 Developments

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Industry Performance

Young adults and urban dwellers are the main consumers of energy drinks

Despite proliferation of sports facilities, demand for energy drinks peaks during hot weather periods

What's Next?

Demand for energy drinks benefits from improved penetration

More premium brands embrace on-trade channels

Demand contained to urban professionals who can afford the higher prices

Competitive Landscape

Refriango consolidates its lead as it expands its portfolio

Castel Groupe with its XXL brand achieves the strongest growth

Channels

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2025 Developments

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Industry Performance

Concentrates remains most popular among low socioeconomic groups

Powder concentrates continues to outshine liquid concentrates in popularity

What's Next?

Rising import duty fees affect demand over the forecast period

Innovation focuses on functional variants

Concentrates with natural ingredients enter the competitive landscape

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2025 Developments

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2025 Developments

RTD coffee remains at an incipient development stage

Industry Performance

Despite the warm weather RTD coffee is unpopular in Angola

What's Next?

Forecast period sales rise but the category remains niche

Industry players lack incentive to invest in developing RTD coffee

Competitive Landscape

Brands such as Nescafé are present in the country but suffer inconsistent supply

Channels

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