



Euromonitor  
International

# Soft Drinks in Tanzania

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### EXECUTIVE SUMMARY

Off-trade RTD volume sales rise in 2025 due to stable socioeconomic conditions

### KEY DATA FINDINGS

### INDUSTRY PERFORMANCE

Government takes initiatives to boost local manufacturing

Innovation in carbonates focuses on meeting evolving consumer tastes

Wellness trend continues to gain traction in urban areas

### WHAT'S NEXT?

Forecast period sales of soft drinks driven by demographic, economic and policy factors

More brands enter the fray as a variety of categories become more popular

Ongoing focus on small pack sizes to boost affordability

### COMPETITIVE LANDSCAPE

SBC Tanzania Ltd leads with its Pepsi, Merinda and 7Up brands

Bakhresa Food Products Ltd achieves the strongest growth through local renown and well established distribution networks

### CHANNELS

Small local grocers retains its outright lead as convenience channels gain momentum

Strong growth of retail e-commerce which remains niche for soft drinks

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### CARBONATES

#### Key Data Findings

#### 2025 Developments

Diversification and affordability drive demand for carbonates

#### Industry Performance

Carbonates remains a popular choice among most demographics, particularly when socialising

Demand remains low for reduced sugar carbonates

#### What's Next?

Stable socioeconomic conditions continue driving forecast period demand

Competition continues intensifying between local and international players

Growing health consciousness boosts demand for reduced sugar carbonates

#### Competitive Landscape

PepsiCo retains the lead despite intensified competition

Local player Bakhresa Food Products Ltd achieves strong growth

#### Channels

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#### Industry Performance

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The health trend promotes consumption of juice with packaged juice providing convenience and a wider range of flavours

#### What's Next?

Demand for juice benefits from diversified offerings in local brands

Expansion in apple farming offers new opportunities for the juice industry

Consumers remain attracted to the convenience of packaged juice, especially in small pack sizes

#### Competitive Landscape

Bakhresa retains the lead with its popular Azam African Fruti brand

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#### Key Data Findings

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##### Industry Performance

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Carbonated bottled water emerges as the most dynamic category

##### What's Next?

Population growth drives sales of bottled water over the forecast period

Premium bottled water enjoys strong dynamism

Price and availability remain key in consumer purchasing decisions

##### Competitive Landscape

Bonite Bottlers leads with its popular Kilimanjaro brand

Bakhresa consolidates its position with strong growth in 2025

##### Channels

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##### 2025 Developments

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##### Industry Performance

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Energy drinks benefits from growing popularity especially among those with demanding jobs, and wider distribution

## What's Next?

Change in taxation supports demand for local energy drinks

Distribution landscape becomes more dynamic

More investment in marketing and promotions becomes necessary over the forecast period

## Competitive Landscape

GlaxoSmithKline UK Ltd leads with its Lucozade brand despite growing competition from local brands

Bakhresa Food Products achieves the strongest dynamism in 2025

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## CONCENTRATES

### Key Data Findings

### 2025 Developments

Affordability continues to support demand for liquid concentrates

### Industry Performance

In addition to affordability, concentrates benefits from versatility

Liquid concentrates are cheaper than powder concentrates and offer a wide favour variety

## What's Next?

Affordability and wellness continue driving demand for concentrates

The on-trade achieves growth from a low base

More favourable economic climate stimulates launch of premium brands and stimulates usage of concentrates in juice cafés

## Competitive Landscape

Excel Chemicals Ltd sustains its lead in concentrates

Strong growth of Chemi & Cotex with its Chemi-Cola brand

## Channels

Small local grocers prevails in the distribution of concentrates, despite growing competition from modern grocers

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