



Concentrates in Kenya

December 2025

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KEY DATA FINDINGS

2025 DEVELOPMENTS

Concentrates faces challenges

INDUSTRY PERFORMANCE

Muted volume growth as consumers seek healthier beverage options
Leading liquid concentrates benefit from their convenience and versatility

WHAT'S NEXT?

Affordability will continue to influence demand
Technological advancements will enable advanced evaporation techniques
Adoption of sustainable practices is crucial

COMPETITIVE LANDSCAPE

Excel Chemicals leads with its Quencher brand a household name
Jetlak Foods offers a diverse portfolio of popular brands

CHANNELS

Small local grocers dominate with an extensive geographic reach
E-commerce platforms carry a full range of soft drinks, including concentrates
Concentrates Conversions
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EXECUTIVE SUMMARY

Soft drinks remains resilient in 2025

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Rising demand for lighter, better-for-you options

Escalating production costs drive price increases

Consumer caution and downgrading

WHAT'S NEXT?

Economic recovery and innovation will sustain growth

Evolving consumer preferences and a more sophisticated retail landscape

Sustainability to play an increasingly important role

COMPETITIVE LANDSCAPE

Coca-Cola, present in the market since 1948, maintains its lead

Coca-Cola strengthens its position through significant investment, acquisitions and diversifying its portfolio

CHANNELS

Leading small local grocers face an increasingly challenging operating landscape

Convenient e-commerce

Foodservice vs retail split

MARKET DATA

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