



Carbonates in the United Arab Emirates

November 2025

Table of Contents

Carbonates in the United Arab Emirates - Category analysis

KEY DATA FINDINGS

2025 DEVELOPMENTS

Carbonates grows steadily despite tax pressures and shifting consumer preferences

INDUSTRY PERFORMANCE

Steady growth seen in carbonates in 2025, despite 50% tax

Reduced sugar carbonates sees fastest growth

WHAT'S NEXT?

New flavours, premiumisation, reduced sugar offerings and indulgence trend will drive growth in carbonates

Technological advancements support sustainability goals

Regulatory environment and product reformulation

COMPETITIVE LANDSCAPE

Pepsi-Cola maintains leadership of overall carbonates in 2025

Vimto and Freez brands see robust rises

CHANNELS

Hypermarkets leads distribution in 2025

E-commerce expands most rapidly among retail channels

CATEGORY DATA

Table 1 - Off-trade vs On-trade Sales of Carbonates: Volume 2020-2025

Table 2 - Off-trade vs On-trade Sales of Carbonates: Value 2020-2025

Table 3 - Off-trade vs On-trade Sales of Carbonates: % Volume Growth 2020-2025

Table 4 - Off-trade vs On-trade Sales of Carbonates: % Value Growth 2020-2025

Table 5 - Off-trade Sales of Carbonates by Category: Volume 2020-2025

Table 6 - Off-trade Sales of Carbonates by Category: Value 2020-2025

Table 7 - Off-trade Sales of Carbonates by Category: % Volume Growth 2020-2025

Table 8 - Off-trade Sales of Carbonates by Category: % Value Growth 2020-2025

Table 9 - Total Sales of Carbonates by Fountain On-trade: Volume 2020-2025

Table 10 - Total Sales of Carbonates by Fountain On-trade: % Volume Growth 2020-2025

Table 11 - NBO Company Shares of Off-trade Carbonates: % Volume 2021-2025

Table 12 - LBN Brand Shares of Off-trade Carbonates: % Volume 2022-2025

Table 13 - NBO Company Shares of Off-trade Carbonates: % Value 2021-2025

Table 14 - LBN Brand Shares of Off-trade Carbonates: % Value 2022-2025

Table 15 - Forecast Off-trade Sales of Carbonates by Category: Volume 2025-2030

Table 16 - Forecast Off-trade Sales of Carbonates by Category: Value 2025-2030

Table 17 - Forecast Off-trade Sales of Carbonates by Category: % Volume Growth 2025-2030

Table 18 - Forecast Off-trade Sales of Carbonates by Category: % Value Growth 2025-2030

Table 19 - Forecast Total Sales of Carbonates by Fountain On-trade: Volume 2025-2030

Table 20 - Forecast Total Sales of Carbonates by Fountain On-trade: % Volume Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

Soft Drinks in the United Arab Emirates - Industry Overview

EXECUTIVE SUMMARY

Momentum driven by health trends, regulation and evolving retail dynamics

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Volume sales rise as progress is shaped by health and indulgence trends

Marketing messages push health claims

Sustainability gains ground in packaging innovation

WHAT'S NEXT?

Sugar tax and labelling system will impact development for soft drinks

Regulations to tighten around packaging and waste

Tech advancements set to support growth

COMPETITIVE LANDSCAPE

Red Bull leads overall soft drinks

Local player Alokozay sees fastest growth

CHANNELS

Hypermarkets leads while e-commerce rises fastest

Small local grocers remain key, as off-trade volumes rise faster than on-trade

MARKET DATA

Table 21 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2020-2025

Table 22 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2020-2025

Table 23 - Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2020-2025

Table 24 - Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2020-2025

Table 25 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: Volume 2025

Table 26 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: % Volume 2025

Table 27 - Off-trade vs On-trade Sales of Soft Drinks by Category: Value 2025

Table 28 - Off-trade vs On-trade Sales of Soft Drinks by Category: % Value 2025

Table 29 - Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2020-2025

Table 30 - Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2020-2025

Table 31 - Off-trade Sales of Soft Drinks by Category: Value 2020-2025

Table 32 - Off-trade Sales of Soft Drinks by Category: % Value Growth 2020-2025

Table 33 - Sales of Soft Drinks by Total Fountain On-trade: Volume 2020-2025

Table 34 - Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2020-2025

Table 35 - NBO Company Shares of Total Soft Drinks (RTD): % Volume 2021-2025

Table 36 - LBN Brand Shares of Total Soft Drinks (RTD): % Volume 2022-2025

Table 37 - NBO Company Shares of On-trade Soft Drinks (RTD): % Volume 2021-2025

Table 38 - LBN Brand Shares of On-trade Soft Drinks (RTD): % Volume 2022-2025

Table 39 - NBO Company Shares of Off-trade Soft Drinks (RTD): % Volume 2021-2025

Table 40 - LBN Brand Shares of Off-trade Soft Drinks (RTD): % Volume 2022-2025

Table 41 - NBO Company Shares of Off-trade Soft Drinks: % Value 2021-2025

Table 42 - LBN Brand Shares of Off-trade Soft Drinks: % Value 2022-2025

Table 43 - Penetration of Private Label in Off-trade Soft Drinks (RTD) by Category: % Volume 2020-2025

Table 44 - Penetration of Private Label in Off-trade Soft Drinks by Category: % Value 2020-2025

Table 45 - Distribution of Off-trade Soft Drinks (as sold) by Format: % Volume 2020-2025

Table 46 - Distribution of Off-trade Soft Drinks (as sold) by Format and Category: % Volume 2025

Table 47 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2025-2030

Table 48 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2025-2030

Table 49 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2025-2030

Table 50 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2025-2030

Table 51 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2025-2030

Table 52 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2025-2030

Table 53 - Forecast Off-trade Sales of Soft Drinks by Category: Value 2025-2030

Table 54 - Forecast Off-trade Sales of Soft Drinks by Category: % Value Growth 2025-2030

Table 55 - Forecast Sales of Soft Drinks by Total Fountain On-trade: Volume 2025-2030

Table 56 - Forecast Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2025-2030

APPENDIX

Fountain sales in the United Arab Emirates

DISCLAIMER

SOURCES

Summary 1 - Research Sources

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/carbonates-in-the-united-arab-emirates/report.