



Euromonitor
International

Carbonates in the Philippines

December 2025

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2025 DEVELOPMENTS

Zero-sugar formats and affordability tactics lift carbonates in 2025

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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

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Retail value sales rise amid stabilising prices

Affordability concerns prompt players to focus on cost to consumers

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