



Euromonitor
International

Soft Drinks in Angola

December 2025

Table of Contents

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

MARKET DATA

Table 1 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2020-2025

Table 2 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2020-2025

Table 3 - Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2020-2025

Table 4 - Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2020-2025

Table 5 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: Volume 2025

Table 6 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: % Volume 2025

Table 7 - Off-trade vs On-trade Sales of Soft Drinks by Category: Value 2025

Table 8 - Off-trade vs On-trade Sales of Soft Drinks by Category: % Value 2025

Table 9 - Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2020-2025

Table 10 - Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2020-2025

Table 11 - Off-trade Sales of Soft Drinks by Category: Value 2020-2025

Table 12 - Off-trade Sales of Soft Drinks by Category: % Value Growth 2020-2025

Table 13 - NBO Company Shares of Off-trade Soft Drinks (RTD): % Volume 2021-2025

Table 14 - LBN Brand Shares of Off-trade Soft Drinks (RTD): % Volume 2022-2025

Table 15 - NBO Company Shares of Off-trade Soft Drinks: % Value 2021-2025

Table 16 - LBN Brand Shares of Off-trade Soft Drinks: % Value 2022-2025

Table 17 - Penetration of Private Label in Off-trade Soft Drinks (RTD) by Category: % Volume 2020-2025

Table 18 - Penetration of Private Label in Off-trade Soft Drinks by Category: % Value 2020-2025

Table 19 - Distribution of Off-trade Soft Drinks (as sold) by Format: % Volume 2020-2025

Table 20 - Distribution of Off-trade Soft Drinks (as sold) by Format and Category: % Volume 2025

Table 21 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2025-2030

Table 22 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2025-2030

Table 23 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2025-2030

Table 24 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2025-2030

Table 25 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2025-2030

Table 26 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2025-2030

Table 27 - Forecast Off-trade Sales of Soft Drinks by Category: Value 2025-2030

Table 28 - Forecast Off-trade Sales of Soft Drinks by Category: % Value Growth 2025-2030

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

Category Data

Table 29 - Off-trade vs On-trade Sales of Carbonates: Volume 2020-2025

Table 30 - Off-trade vs On-trade Sales of Carbonates: Value 2020-2025

Table 31 - Off-trade vs On-trade Sales of Carbonates: % Volume Growth 2020-2025

Table 32 - Off-trade vs On-trade Sales of Carbonates: % Value Growth 2020-2025

Table 33 - Off-trade Sales of Carbonates by Category: Volume 2020-2025

Table 34 - Off-trade Sales of Carbonates by Category: Value 2020-2025

Table 35 - Off-trade Sales of Carbonates by Category: % Volume Growth 2020-2025

Table 36 - Off-trade Sales of Carbonates by Category: % Value Growth 2020-2025

Table 37 - NBO Company Shares of Off-trade Carbonates: % Volume 2021-2025

Table 38 - LBN Brand Shares of Off-trade Carbonates: % Volume 2022-2025

Table 39 - NBO Company Shares of Off-trade Carbonates: % Value 2021-2025

Table 40 - LBN Brand Shares of Off-trade Carbonates: % Value 2022-2025

Table 41 - Forecast Off-trade Sales of Carbonates by Category: Volume 2025-2030

Table 42 - Forecast Off-trade Sales of Carbonates by Category: Value 2025-2030

Table 43 - Forecast Off-trade Sales of Carbonates by Category: % Volume Growth 2025-2030

Table 44 - Forecast Off-trade Sales of Carbonates by Category: % Value Growth 2025-2030

JUICE

Key Data Findings

2025 Developments

Demand for juice is affected by the rising cost of living

Industry Performance

Juice is commonly consumed across age groups, but particularly urban dwellers

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

Channels

Small local grocers remains important in juice though distribution remains mixed across the category

Retail e-commerce remains nascent and registers growth from a low base

Category Data

Table 45 - Off-trade Sales of Juice by Category: Volume 2020-2025

Table 46 - Off-trade Sales of Juice by Category: Value 2020-2025

Table 47 - Off-trade Sales of Juice by Category: % Volume Growth 2020-2025

Table 48 - Off-trade Sales of Juice by Category: % Value Growth 2020-2025

Table 49 - NBO Company Shares of Off-trade Juice: % Volume 2021-2025

Table 50 - LBN Brand Shares of Off-trade Juice: % Volume 2022-2025

Table 51 - NBO Company Shares of Off-trade Juice: % Value 2021-2025

Table 52 - LBN Brand Shares of Off-trade Juice: % Value 2022-2025

Table 53 - Forecast Off-trade Sales of Juice by Category: Volume 2025-2030

Table 54 - Forecast Off-trade Sales of Juice by Category: Value 2025-2030

Table 55 - Forecast Off-trade Sales of Juice by Category: % Volume Growth 2025-2030

Table 56 - Forecast Off-trade Sales of Juice by Category: % Value Growth 2025-2030

BOTTLED WATER

Key Data Findings

2025 Developments

Rising health concerns boost demand in urban areas

Industry Performance

Bottled water remains the only viable option for many people due to a lack of potability of tap water

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

Category Data

Table 57 - Off-trade Sales of Bottled Water by Category: Volume 2020-2025

Table 58 - Off-trade Sales of Bottled Water by Category: Value 2020-2025

Table 59 - Off-trade Sales of Bottled Water by Category: % Volume Growth 2020-2025

Table 60 - Off-trade Sales of Bottled Water by Category: % Value Growth 2020-2025

Table 61 - NBO Company Shares of Off-trade Bottled Water: % Volume 2021-2025

Table 62 - LBN Brand Shares of Off-trade Bottled Water: % Volume 2022-2025

Table 63 - NBO Company Shares of Off-trade Bottled Water: % Value 2021-2025

Table 64 - LBN Brand Shares of Off-trade Bottled Water: % Value 2022-2025

Table 65 - Forecast Off-trade Sales of Bottled Water by Category: Volume 2025-2030

Table 66 - Forecast Off-trade Sales of Bottled Water by Category: Value 2025-2030

Table 67 - Forecast Off-trade Sales of Bottled Water by Category: % Volume Growth 2025-2030

Table 68 - Forecast Off-trade Sales of Bottled Water by Category: % Value Growth 2025-2030

SPORTS DRINKS

2025 Developments

Innovation becomes faster, riskier, and more culturally embedded

Industry Performance

Affordability is reshaping competitive dynamics

Functional beverages and health needs drive premium growth

What's Next?

Sports drinks sales remain nascent over the forecast period

Competitive Landscape

Multinationals are present in the country though their shares are too low to discern

Channels

Modern grocery retailers lead in sales of sports drinks

Category Data

Table 69 - Off-trade Sales of Sports Drinks: Volume 2020-2025

Table 70 - Off-trade Sales of Sports Drinks: Value 2020-2025

Table 71 - Off-trade Sales of Sports Drinks: % Volume Growth 2020-2025

Table 72 - Off-trade Sales of Sports Drinks: % Value Growth 2020-2025

Table 73 - NBO Company Shares of Off-trade Sports Drinks: % Volume 2021-2025

Table 74 - LBN Brand Shares of Off-trade Sports Drinks: % Volume 2022-2025

Table 75 - NBO Company Shares of Off-trade Sports Drinks: % Value 2021-2025

Table 76 - LBN Brand Shares of Off-trade Sports Drinks: % Value 2022-2025

Table 77 - Forecast Off-trade Sales of Sports Drinks: Volume 2025-2030

Table 78 - Forecast Off-trade Sales of Sports Drinks: Value 2025-2030

Table 79 - Forecast Off-trade Sales of Sports Drinks: % Volume Growth 2025-2030

Table 80 - Forecast Off-trade Sales of Sports Drinks: % Value Growth 2025-2030

ENERGY DRINKS

Key Data Findings

2025 Developments

Demand for energy drinks benefits from evolving consumer lifestyles

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

More premium brands are betting on affluent consumers and the on-trade channel

Convenience retailers and retail e-commerce grow from a low base

Category Data

Table 81 - Off-trade Sales of Energy Drinks: Volume 2020-2025

Table 82 - Off-trade Sales of Energy Drinks: Value 2020-2025

Table 83 - Off-trade Sales of Energy Drinks: % Volume Growth 2020-2025

Table 84 - Off-trade Sales of Energy Drinks: % Value Growth 2020-2025

Table 85 - NBO Company Shares of Off-trade Energy Drinks: % Volume 2021-2025

Table 86 - LBN Brand Shares of Off-trade Energy Drinks: % Volume 2022-2025

Table 87 - NBO Company Shares of Off-trade Energy Drinks: % Value 2021-2025

Table 88 - LBN Brand Shares of Off-trade Energy Drinks: % Value 2022-2025

Table 89 - Forecast Off-trade Sales of Energy Drinks: Volume 2025-2030

Table 90 - Forecast Off-trade Sales of Energy Drinks: Value 2025-2030

Table 91 - Forecast Off-trade Sales of Energy Drinks: % Volume Growth 2025-2030

Table 92 - Forecast Off-trade Sales of Energy Drinks: % Value Growth 2025-2030

CONCENTRATES

Key Data Findings

2025 Developments

Demand for concentrates remains subject to affordability

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

Competitive LandSCAPE

Rising operating costs limit the influx of new entrants

Tiger Brands achieves strong growth with its Oros brand

Channels

Distribution of liquid concentrates is increasingly dynamic

Category Data

Table 93 - Off-trade Sales of Concentrates (RTD) by Category: Volume 2020-2025

Table 94 - Off-trade Sales of Concentrates by Category: Value 2020-2025

Table 95 - Off-trade Sales of Concentrates (RTD) by Category: % Volume Growth 2020-2025

Table 96 - Off-trade Sales of Concentrates by Category: % Value Growth 2020-2025

Table 97 - NBO Company Shares of Off-trade Concentrates (RTD): % Volume 2021-2025

Table 98 - LBN Brand Shares of Off-trade Concentrates (RTD): % Volume 2022-2025

Table 99 - NBO Company Shares of Off-trade Concentrates: % Volume 2021-2025

Table 100 - LBN Brand Shares of Off-trade Concentrates: % Volume 2022-2025

Table 101 - NBO Company Shares of Off-trade Concentrates: % Value 2021-2025

Table 102 - LBN Brand Shares of Off-trade Concentrates: % Value 2022-2025

Table 103 - NBO Company Shares of Off-trade Liquid Concentrates (RTD): % Volume 2021-2025

Table 104 - LBN Brand Shares of Off-trade Liquid Concentrates (RTD): % Volume 2022-2025

Table 105 - NBO Company Shares of Off-trade Liquid Concentrates: % Volume 2021-2025

Table 106 - LBN Brand Shares of Off-trade Liquid Concentrates: % Volume 2022-2025

Table 107 - NBO Company Shares of Off-trade Powder Concentrates (RTD): % Volume 2021-2025

Table 108 - LBN Brand Shares of Off-trade Powder Concentrates (RTD): % Volume 2022-2025

Table 109 - NBO Company Shares of Off-trade Powder Concentrates: % Volume 2021-2025

Table 110 - LBN Brand Shares of Off-trade Powder Concentrates: % Volume 2022-2025

Table 111 - Forecast Off-trade Sales of Concentrates (RTD) by Category: Volume 2025-2030

Table 112 - Forecast Off-trade Sales of Concentrates by Category: Value 2025-2030

Table 113 - Forecast Off-trade Sales of Concentrates (RTD) by Category: % Volume Growth 2025-2030

Table 114 - Forecast Off-trade Sales of Concentrates by Category: % Value Growth 2025-2030

RTD TEA

2025 Developments

Category suffers from low awareness

What's Next?

Lack of prospects due to a lack of consumer awareness of RTD tea

Competitive Landscape

Category suffers from inconsistent supply of imported RTD brands

Channels

RTD tea is available via modern grocery retailers

Category Data

Table 115 - Off-trade Sales of RTD Tea by Category: Volume 2020-2025

Table 116 - Off-trade Sales of RTD Tea by Category: Value 2020-2025

Table 117 - Off-trade Sales of RTD Tea by Category: % Volume Growth 2020-2025

Table 118 - Off-trade Sales of RTD Tea by Category: % Value Growth 2020-2025

Table 119 - NBO Company Shares of Off-trade RTD Tea: % Volume 2021-2025

Table 120 - LBN Brand Shares of Off-trade RTD Tea: % Volume 2022-2025

Table 121 - NBO Company Shares of Off-trade RTD Tea: % Value 2021-2025

Table 122 - LBN Brand Shares of Off-trade RTD Tea: % Value 2022-2025

Table 123 - Forecast Off-trade Sales of RTD Tea by Category: Volume 2025-2030

Table 124 - Forecast Off-trade Sales of RTD Tea by Category: Value 2025-2030

Table 125 - Forecast Off-trade Sales of RTD Tea by Category: % Volume Growth 2025-2030

Table 126 - Forecast Off-trade Sales of RTD Tea by Category: % Value Growth 2025-2030

RTD COFFEE

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

Growth of RTD coffee hampered by a lack of development of chained specialist coffee shops

Category Data

Table 127 - Off-trade Sales of RTD Coffee: Volume 2020-2025

Table 128 - Off-trade Sales of RTD Coffee: Value 2020-2025

Table 129 - Off-trade Sales of RTD Coffee: % Volume Growth 2020-2025

Table 130 - Off-trade Sales of RTD Coffee: % Value Growth 2020-2025

Table 131 - NBO Company Shares of Off-trade RTD Coffee: % Volume 2021-2025

Table 132 - LBN Brand Shares of Off-trade RTD Coffee: % Volume 2022-2025

Table 133 - NBO Company Shares of Off-trade RTD Coffee: % Value 2021-2025

Table 134 - LBN Brand Shares of Off-trade RTD Coffee: % Value 2022-2025

Table 135 - Forecast Off-trade Sales of RTD Coffee: Volume 2025-2030

Table 136 - Forecast Off-trade Sales of RTD Coffee: Value 2025-2030

Table 137 - Forecast Off-trade Sales of RTD Coffee: % Volume Growth 2025-2030

Table 138 - Forecast Off-trade Sales of RTD Coffee: % Value Growth 2025-2030

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/soft-drinks-in-angola/report.