



Soft Drinks in Tanzania

March 2026

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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

Small local grocers continues to dominate soft drinks distribution

Retail e-commerce grows from a low base while supermarkets benefits from changes in consumer shopping habits

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Key Data Findings

2025 Developments

Increased interest in healthier beverages drives demand for juice

Industry Performance

Juice remains popular and widely consumed

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

Bakhresa consolidates its lead after expanding its production capacity

Channels

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BOTTLED WATER

Key Data Findings

2025 Developments

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Industry Performance

Bottled water sales benefit from poor quality tap water

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

Small local grocers utterly dominates the distribution of bottled water

Retail e-commerce achieves strong growth though the channel remains nascent for sales of bottled water

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ENERGY DRINKS

Key Data Findings

2025 Developments

Improved penetration in urban areas drives demand for energy drinks

Industry Performance

Energy drinks are popular among young people while socialising though concerns are being raised over mixing energy drinks with alcoholic beverages

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

Channels

Small local grocers dominates sales of energy drinks

Supermarkets is the most dynamic distribution channel

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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

Strong growth of modern grocers in the distribution of concentrates

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