

Soft Drinks in Algeria

November 2023

Table of Contents

Soft Drinks in Algeria

EXECUTIVE SUMMARY

Soft drinks in 2023: The big picture

2023 key trends

Competitive landscape

Retailing developments

Foodservice vs retail split

What next for soft drinks?

MARKET DATA

Table 1 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2018-2023

Table 2 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2018-2023

Table 3 - Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2018-2023

Table 4 - Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2018-2023

Table 5 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: Volume 2022

Table 6 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: % Volume 2022

Table 7 - Off-trade vs On-trade Sales of Soft Drinks by Category: Value 2022

Table 8 - Off-trade vs On-trade Sales of Soft Drinks by Category: % Value 2022

Table 9 - Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2018-2023

Table 10 - Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2018-2023

Table 11 - Off-trade Sales of Soft Drinks by Category: Value 2018-2023

Table 12 - Off-trade Sales of Soft Drinks by Category: % Value Growth 2018-2023

Table 13 - NBO Company Shares of Off-trade Soft Drinks (RTD): % Volume 2019-2023

Table 14 - LBN Brand Shares of Off-trade Soft Drinks (RTD): % Volume 2020-2023

Table 15 - NBO Company Shares of Off-trade Soft Drinks: % Value 2019-2023

Table 16 - LBN Brand Shares of Off-trade Soft Drinks: % Value 2020-2023

Table 17 - Distribution of Off-trade Soft Drinks (as sold) by Format: % Volume 2018-2023

Table 18 - Distribution of Off-trade Soft Drinks (as sold) by Format and Category: % Volume 2023

Table 19 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2023-2028

Table 20 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2023-2028

Table 21 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2023-2028

Table 22 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2023-2028

Table 23 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2023-2028

Table 24 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2023-2028

Table 25 - Forecast Off-trade Sales of Soft Drinks by Category: Value 2023-2028

Table 26 - Forecast Off-trade Sales of Soft Drinks by Category: % Value Growth 2023-2028

DISCLAIMER

SOURCES

Summary 1 - Research Sources

Bottled Water in Algeria

KEY DATA FINDINGS

2023 DEVELOPMENTS

Low quality of tap water supports volume sales

Competitive landscape stable in 2023

Flavoured bottled water registers growth, though from low base

PROSPECTS AND OPPORTUNITIES

Continued growth, driven by concerns over quality of tap water

Local brands continue to dominate
Expansion of health positioning

CATEGORY DATA

Table 27 - Off-trade Sales of Bottled Water by Category: Volume 2018-2023
Table 28 - Off-trade Sales of Bottled Water by Category: Value 2018-2023
Table 29 - Off-trade Sales of Bottled Water by Category: % Volume Growth 2018-2023
Table 30 - Off-trade Sales of Bottled Water by Category: % Value Growth 2018-2023
Table 31 - NBO Company Shares of Off-trade Bottled Water: % Volume 2019-2023
Table 32 - LBN Brand Shares of Off-trade Bottled Water: % Volume 2020-2023
Table 33 - NBO Company Shares of Off-trade Bottled Water: % Value 2019-2023
Table 34 - LBN Brand Shares of Off-trade Bottled Water: % Value 2020-2023
Table 35 - Forecast Off-trade Sales of Bottled Water by Category: Volume 2023-2028
Table 36 - Forecast Off-trade Sales of Bottled Water by Category: Value 2023-2028
Table 37 - Forecast Off-trade Sales of Bottled Water by Category: % Volume Growth 2023-2028
Table 38 - Forecast Off-trade Sales of Bottled Water by Category: % Value Growth 2023-2028

Carbonates in Algeria

KEY DATA FINDINGS

2023 DEVELOPMENTS

Muted volume growth as inflation continues to bite
Reduced sugar variants register highest volume growth
Coca-Cola continues to dominate, benefiting from consumer loyalty and strong brand positioning

PROSPECTS AND OPPORTUNITIES

Demographic trends and on-trade development boost consumption
Wider offerings of healthier carbonates
Other soft drinks pose increasing threat

CATEGORY DATA

Table 39 - Off-trade vs On-trade Sales of Carbonates: Volume 2018-2023
Table 40 - Off-trade vs On-trade Sales of Carbonates: Value 2018-2023
Table 41 - Off-trade vs On-trade Sales of Carbonates: % Volume Growth 2018-2023
Table 42 - Off-trade vs On-trade Sales of Carbonates: % Value Growth 2018-2023
Table 43 - Off-trade Sales of Carbonates by Category: Volume 2018-2023
Table 44 - Off-trade Sales of Carbonates by Category: Value 2018-2023
Table 45 - Off-trade Sales of Carbonates by Category: % Volume Growth 2018-2023
Table 46 - Off-trade Sales of Carbonates by Category: % Value Growth 2018-2023
Table 47 - NBO Company Shares of Off-trade Carbonates: % Volume 2019-2023
Table 48 - LBN Brand Shares of Off-trade Carbonates: % Volume 2020-2023
Table 49 - NBO Company Shares of Off-trade Carbonates: % Value 2019-2023
Table 50 - LBN Brand Shares of Off-trade Carbonates: % Value 2020-2023
Table 51 - Forecast Off-trade Sales of Carbonates by Category: Volume 2023-2028
Table 52 - Forecast Off-trade Sales of Carbonates by Category: Value 2023-2028
Table 53 - Forecast Off-trade Sales of Carbonates by Category: % Volume Growth 2023-2028
Table 54 - Forecast Off-trade Sales of Carbonates by Category: % Value Growth 2023-2028

Concentrates in Algeria

KEY DATA FINDINGS

2023 DEVELOPMENTS

Muted volume growth for concentrates
Powder concentrates remain most popular format
Promasidor maintains its leadership

PROSPECTS AND OPPORTUNITIES

Limited growth potential for concentrates over the forecast period
Focus on healthier positioning
Innovation needed to boost sector

CATEGORY DATA

Concentrates Conversions

Summary 2 - Concentrates Conversion Factors for Ready-to-Drink (RTD) Format

Table 55 - Off-trade Sales of Concentrates (RTD) by Category: Volume 2018-2023

Table 56 - Off-trade Sales of Concentrates by Category: Value 2018-2023

Table 57 - Off-trade Sales of Concentrates (RTD) by Category: % Volume Growth 2018-2023

Table 58 - Off-trade Sales of Concentrates by Category: % Value Growth 2018-2023

Table 59 - NBO Company Shares of Off-trade Concentrates (RTD): % Volume 2019-2023

Table 60 - LBN Brand Shares of Off-trade Concentrates (RTD): % Volume 2020-2023

Table 61 - NBO Company Shares of Off-trade Concentrates: % Value 2019-2023

Table 62 - LBN Brand Shares of Off-trade Concentrates: % Value 2020-2023

Table 63 - NBO Company Shares of Off-trade Liquid Concentrates (RTD): % Volume 2019-2023

Table 64 - LBN Brand Shares of Off-trade Liquid Concentrates (RTD): % Volume 2020-2023

Table 65 - NBO Company Shares of Off-trade Powder Concentrates (RTD): % Volume 2019-2023

Table 66 - LBN Brand Shares of Off-trade Powder Concentrates (RTD): % Volume 2020-2023

Table 67 - Forecast Off-trade Sales of Concentrates (RTD) by Category: Volume 2023-2028

Table 68 - Forecast Off-trade Sales of Concentrates by Category: Value 2023-2028

Table 69 - Forecast Off-trade Sales of Concentrates (RTD) by Category: % Volume Growth 2023-2028

Table 70 - Forecast Off-trade Sales of Concentrates by Category: % Value Growth 2023-2028

Juice in Algeria

KEY DATA FINDINGS

2023 DEVELOPMENTS

Degree of trading down among price sensitive consumers
Landscape dominated by domestic producers
Growing awareness of fruit content in juices

PROSPECTS AND OPPORTUNITIES

Positive growth over forecast period
Value for money drives volume sales
Home-made juices continue to dampen volume sales

CATEGORY DATA

Table 71 - Off-trade Sales of Juice by Category: Volume 2018-2023

Table 72 - Off-trade Sales of Juice by Category: Value 2018-2023

Table 73 - Off-trade Sales of Juice by Category: % Volume Growth 2018-2023

Table 74 - Off-trade Sales of Juice by Category: % Value Growth 2018-2023

Table 75 - NBO Company Shares of Off-trade Juice: % Volume 2019-2023

Table 76 - LBN Brand Shares of Off-trade Juice: % Volume 2020-2023

Table 77 - NBO Company Shares of Off-trade Juice: % Value 2019-2023

Table 78 - LBN Brand Shares of Off-trade Juice: % Value 2020-2023

Table 79 - Forecast Off-trade Sales of Juice by Category: Volume 2023-2028

Table 80 - Forecast Off-trade Sales of Juice by Category: Value 2023-2028

Table 81 - Forecast Off-trade Sales of Juice by Category: % Volume Growth 2023-2028

Table 82 - Forecast Off-trade Sales of Juice by Category: % Value Growth 2023-2028

Energy Drinks in Algeria

KEY DATA FINDINGS

2023 DEVELOPMENTS

Continuing healthy volume growth

Information campaigns required to educate consumers about energy drinks

Local brands gain ground

PROSPECTS AND OPPORTUNITIES

Rosy outlook over forecast period

Association with sports maintain demand for energy drinks

Increasing concerns over high caffeine content

CATEGORY DATA

Table 83 - Off-trade Sales of Energy Drinks: Volume 2018-2023

Table 84 - Off-trade Sales of Energy Drinks: Value 2018-2023

Table 85 - Off-trade Sales of Energy Drinks: % Volume Growth 2018-2023

Table 86 - Off-trade Sales of Energy Drinks: % Value Growth 2018-2023

Table 87 - NBO Company Shares of Off-trade Energy Drinks: % Volume 2019-2023

Table 88 - LBN Brand Shares of Off-trade Energy Drinks: % Volume 2020-2023

Table 89 - NBO Company Shares of Off-trade Energy Drinks: % Value 2019-2023

Table 90 - LBN Brand Shares of Off-trade Energy Drinks: % Value 2020-2023

Table 91 - Forecast Off-trade Sales of Energy Drinks: Volume 2023-2028

Table 92 - Forecast Off-trade Sales of Energy Drinks: Value 2023-2028

Table 93 - Forecast Off-trade Sales of Energy Drinks: % Volume Growth 2023-2028

Table 94 - Forecast Off-trade Sales of Energy Drinks: % Value Growth 2023-2028

Sports Drinks in Algeria

KEY DATA FINDINGS

2023 DEVELOPMENTS

Sports drinks continue to see low demand

Benefits of sports drinks not clearly understood

Ibrahim & Fils Ifri continues to dominate sports drinks

PROSPECTS AND OPPORTUNITIES

Sports drinks remain niche

Increasing sports activities supports some growth

Lack of innovation stymies growth

CATEGORY DATA

Table 95 - Off-trade Sales of Sports Drinks: Volume 2018-2023

Table 96 - Off-trade Sales of Sports Drinks: Value 2018-2023

Table 97 - Off-trade Sales of Sports Drinks: % Volume Growth 2018-2023

Table 98 - Off-trade Sales of Sports Drinks: % Value Growth 2018-2023

Table 99 - NBO Company Shares of Off-trade Sports Drinks: % Volume 2019-2023

Table 100 - LBN Brand Shares of Off-trade Sports Drinks: % Volume 2020-2023

Table 101 - NBO Company Shares of Off-trade Sports Drinks: % Value 2019-2023

Table 102 - LBN Brand Shares of Off-trade Sports Drinks: % Value 2020-2023

Table 103 - Forecast Off-trade Sales of Sports Drinks: Volume 2023-2028

Table 104 - Forecast Off-trade Sales of Sports Drinks: Value 2023-2028

Table 105 - Forecast Off-trade Sales of Sports Drinks: % Volume Growth 2023-2028

Table 106 - Forecast Off-trade Sales of Sports Drinks: % Value Growth 2023-2028

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-algeria/report.