

# Carbonates in Uzbekistan

January 2026

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### KEY DATA FINDINGS

#### 2025 DEVELOPMENTS

Volume sales of carbonates rebound to healthy growth

#### INDUSTRY PERFORMANCE

Consumers adjust to the higher price environment and demand returns

Demand for flavour diversification boosts demand for other non-cola carbonates

#### WHAT'S NEXT?

Positive sales supported by a strong consumer audience and ongoing innovations

Social media will continue to be a key consumer engagement channel

New tax regulations set to impact high-sugar soft drinks

#### COMPETITIVE LANDSCAPE

Coca-Cola benefits from strong brand activity and infrastructure investments

Lomisi benefits from increased imports of Natakhtari, while Coca-Cola sees a rebound in growth

#### CHANNELS

Small local grocers maintains largest channel lead, despite competition from the ongoing expansion of large retailers

Convenience stores and e-commerce show strong growth from low bases

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## Soft Drinks in Uzbekistan - Industry Overview

### EXECUTIVE SUMMARY

Healthy sales overall for soft drinks, as the category rebounds

### KEY DATA FINDINGS

## INDUSTRY PERFORMANCE

Flavour and packaging innovations are key growth drivers in soft drinks

RTD tea benefits from new flavour launches, with Coca-Cola's Fuse Tea leading the way

The rise of other non-cola carbonates is supported by new flavour innovations

## WHAT'S NEXT?

Ongoing positive sales for soft drinks, supported by economic stabilisation and shifting lifestyle trends

Company activity and product innovation will remain central to the performance of soft drinks

Reduced-sugar variants and underdeveloped categories expected to remain niche

## COMPETITIVE LANDSCAPE

Coca-Cola maintains leading place thanks to strong brand portfolio and frequent innovations

Lomisi benefits from increased imports of Natakhtari, while Coca-Cola sees a rebound in growth

Acqua Life Bottlers active in new flavour developments in carbonates

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Small local grocers continue to play a crucial role to sales

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