



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 Nataktari, while Coca-Cola sees a rebound in growth

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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 Nataktari, 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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