



Euromonitor
International

Carbonates in Kazakhstan

December 2025

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KEY DATA FINDINGS

2025 DEVELOPMENTS

Healthy volume growth

INDUSTRY PERFORMANCE

Recovery for carbonates in 2025

Tonic Water/mixers/other bitters registers highest volume growth

WHAT'S NEXT?

Modest volume growth over forecast period

Flavour innovations keep consumers engaged

Reduced sugar fails to gain traction

COMPETITIVE LANDSCAPE

Coca-Cola continues to dominate, with PepsiCo in second position

Some smaller players making an impact

CHANNELS

Small local grocers lead retail distribution, but are losing volume share

Significant volume sales through foodservice

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Soft Drinks in Kazakhstan - Industry Overview

EXECUTIVE SUMMARY

2025 marks a recovery, as inflation eases

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Recovery, after previous difficult year
Consumers still price sensitive
RTD tea strongest performer
Continuing flavour innovation

WHAT'S NEXT?

Moderate volume growth over forecast period
Continuing price sensitivity
Continuing regulatory pressure on energy drinks

COMPETITIVE LANDSCAPE

Coca-Cola holds on to commanding lead and makes strong recovery after difficult 2024
RG Brands has significant foothold

CHANNELS

Small local grocers lead, but lose value share
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