



Concentrates in Kazakhstan

December 2025

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Concentrates in Kazakhstan - Category analysis

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2025 DEVELOPMENTS

Limited interest in concentrates

INDUSTRY PERFORMANCE

Marginal volume decline in 2025

Liquid concentrates gain most volume share

WHAT'S NEXT

Growth flat over forecast period

Limited innovation sees concentrates continuing to struggle

Opportunities in focusing on a healthier positioning

COMPETITIVE LANDSCAPE

Russian and local companies dominate

Smaller players come and go

CHANNELS

Differing distribution for liquid and powder concentrates

Convenience stores and e-commerce register healthy volume growth

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Soft Drinks in Kazakhstan - Industry Overview

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2025 marks a recovery, as inflation eases

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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

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Small local grocers lead, but lose value share

E-commerce and convenience stores register healthy value growth

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