



**Euromonitor  
International**

# Soft Drinks in Kazakhstan

December 2025

Table of Contents

EXECUTIVE SUMMARY

2025 marks a recovery, as inflation eases

KEY DATA FINDINGS

INDUSTRY PERFROMANCE

- 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
- E-commerce and convenience stores register healthy value growth
- Foodservice vs retail split

MARKET DATA

- Table 1 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2020-2025
- Table 2 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2020-2025
- Table 3 - Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2020-2025
- Table 4 - Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2020-2025
- Table 5 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: Volume 2025
- Table 6 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: % Volume 2025
- Table 7 - Off-trade vs On-trade Sales of Soft Drinks by Category: Value 2025
- Table 8 - Off-trade vs On-trade Sales of Soft Drinks by Category: % Value 2025
- Table 9 - Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2020-2025
- Table 10 - Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2020-2025
- Table 11 - Off-trade Sales of Soft Drinks by Category: Value 2020-2025
- Table 12 - Off-trade Sales of Soft Drinks by Category: % Value Growth 2020-2025
- Table 13 - Sales of Soft Drinks by Total Fountain On-trade: Volume 2020-2025
- Table 14 - Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2020-2025
- Table 15 - NBO Company Shares of Off-trade Soft Drinks (RTD): % Volume 2021-2025
- Table 16 - LBN Brand Shares of Off-trade Soft Drinks (RTD): % Volume 2022-2025
- Table 17 - NBO Company Shares of Off-trade Soft Drinks: % Value 2021-2025
- Table 18 - LBN Brand Shares of Off-trade Soft Drinks: % Value 2022-2025
- Table 19 - Penetration of Private Label in Off-trade Soft Drinks (RTD) by Category: % Volume 2020-2025
- Table 20 - Penetration of Private Label in Off-trade Soft Drinks by Category: % Value 2020-2025
- Table 21 - Distribution of Off-trade Soft Drinks (as sold) by Format: % Volume 2020-2025
- Table 22 - Distribution of Off-trade Soft Drinks (as sold) by Format and Category: % Volume 2025
- Table 23 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2025-2030
- Table 24 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2025-2030
- Table 25 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2025-2030
- Table 26 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2025-2030

Table 27 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2025-2030  
Table 28 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2025-2030  
Table 29 - Forecast Off-trade Sales of Soft Drinks by Category: Value 2025-2030  
Table 30 - Forecast Off-trade Sales of Soft Drinks by Category: % Value Growth 2025-2030  
Table 31 - Forecast Sales of Soft Drinks by Total Fountain On-trade: Volume 2025-2030  
Table 32 - Forecast Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2025-2030

## COUNTRY REPORTS DISCLAIMER

## SOURCES

Summary 1 - Research Sources

[Bottled Water in Kazakhstan](#)

## KEY DATA FINDINGS

### 2025 DEVELOPMENTS

Ongoing issues with tap water support volume sales

### INDUSTRY PERFORMANCE

Continuing volume growth for bottled water

Flavoured bottled water registers highest volume growth

### WHAT'S NEXT?

Further healthy volume growth

Minimal innovation over forecast period

Limited demand for functional bottled water as yet

### COMPETITIVE LANDSCAPE

RG Brands continues to lead, with Unix close behind

Coca-Cola performs strongly

### CHANNELS

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

Some volume sales through foodservice

### CATEGORY DATA

Table 33 - Off-trade Sales of Bottled Water by Category: Volume 2020-2025  
Table 34 - Off-trade Sales of Bottled Water by Category: Value 2020-2025  
Table 35 - Off-trade Sales of Bottled Water by Category: % Volume Growth 2020-2025  
Table 36 - Off-trade Sales of Bottled Water by Category: % Value Growth 2020-2025  
Table 37 - NBO Company Shares of Off-trade Bottled Water: % Volume 2021-2025  
Table 38 - LBN Brand Shares of Off-trade Bottled Water: % Volume 2022-2025  
Table 39 - NBO Company Shares of Off-trade Bottled Water: % Value 2021-2025  
Table 40 - LBN Brand Shares of Off-trade Bottled Water: % Value 2022-2025  
Table 41 - Forecast Off-trade Sales of Bottled Water by Category: Volume 2025-2030  
Table 42 - Forecast Off-trade Sales of Bottled Water by Category: Value 2025-2030  
Table 43 - Forecast Off-trade Sales of Bottled Water by Category: % Volume Growth 2025-2030  
Table 44 - Forecast Off-trade Sales of Bottled Water by Category: % Value Growth 2025-2030

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[Carbonates in Kazakhstan](#)

## 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

## CATEGORY DATA

Table 45 - Off-trade vs On-trade Sales of Carbonates: Volume 2020-2025

Table 46 - Off-trade vs On-trade Sales of Carbonates: Value 2020-2025

Table 47 - Off-trade vs On-trade Sales of Carbonates: % Volume Growth 2020-2025

Table 48 - Off-trade vs On-trade Sales of Carbonates: % Value Growth 2020-2025

Table 49 - Off-trade Sales of Carbonates by Category: Volume 2020-2025

Table 50 - Off-trade Sales of Carbonates by Category: Value 2020-2025

Table 51 - Off-trade Sales of Carbonates by Category: % Volume Growth 2020-2025

Table 52 - Off-trade Sales of Carbonates by Category: % Value Growth 2020-2025

Table 53 - Sales of Carbonates by Total Fountain On-trade: Volume 2020-2025

Table 54 - Sales of Carbonates by Total Fountain On-trade: % Volume Growth 2020-2025

Table 55 - NBO Company Shares of Off-trade Carbonates: % Volume 2021-2025

Table 56 - LBN Brand Shares of Off-trade Carbonates: % Volume 2022-2025

Table 57 - NBO Company Shares of Off-trade Carbonates: % Value 2021-2025

Table 58 - LBN Brand Shares of Off-trade Carbonates: % Value 2022-2025

Table 59 - Forecast Off-trade Sales of Carbonates by Category: Volume 2025-2030

Table 60 - Forecast Off-trade Sales of Carbonates by Category: Value 2025-2030

Table 61 - Forecast Off-trade Sales of Carbonates by Category: % Volume Growth 2025-2030

Table 62 - Forecast Off-trade Sales of Carbonates by Category: % Value Growth 2025-2030

Table 63 - Forecast Sales of Carbonates by Total Fountain On-trade: Volume 2025-2030

Table 64 - Forecast Sales of Carbonates by Total Fountain On-trade: % Volume Growth 2025-2030

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[Concentrates in Kazakhstan](#)

## KEY DATA FINDINGS

### 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

Concentrates Conversions

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

## CATEGORY DATA

Table 65 - Off-trade Sales of Concentrates (RTD) by Category: Volume 2020-2025

Table 66 - Off-trade Sales of Concentrates by Category: Value 2020-2025

Table 67 - Off-trade Sales of Concentrates (RTD) by Category: % Volume Growth 2020-2025

Table 68 - Off-trade Sales of Concentrates by Category: % Value Growth 2020-2025

Table 69 - NBO Company Shares of Off-trade Concentrates (RTD): % Volume 2021-2025

Table 70 - LBN Brand Shares of Off-trade Concentrates (RTD): % Volume 2022-2025

Table 71 - NBO Company Shares of Off-trade Concentrates: % Value 2021-2025

Table 72 - LBN Brand Shares of Off-trade Concentrates: % Value 2022-2025

Table 73 - NBO Company Shares of Off-trade Liquid Concentrates (RTD): % Volume 2021-2025

Table 74 - LBN Brand Shares of Off-trade Liquid Concentrates (RTD): % Volume 2022-2025

Table 75 - NBO Company Shares of Off-trade Powder Concentrates (RTD): % Volume 2021-2025

Table 76 - LBN Brand Shares of Off-trade Powder Concentrates (RTD): % Volume 2022-2025

Table 77 - Forecast Off-trade Sales of Concentrates (RTD) by Category: Volume 2025-2030

Table 78 - Forecast Off-trade Sales of Concentrates by Category: Value 2025-2030

Table 79 - Forecast Off-trade Sales of Concentrates (RTD) by Category: % Volume Growth 2025-2030

Table 80 - Forecast Off-trade Sales of Concentrates by Category: % Value Growth 2025-2030

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[Juice in Kazakhstan](#)

## KEY DATA FINDINGS

### 2025 DEVELOPMENTS

Little room for more premium offerings

## INDUSTRY PERFORMANCE

Minimal volume growth, though some recovery from previous years

Juice drinks (up to 24% juice) gain most volume share

## WHAT'S NEXT?

Minimal volume growth, with consumers still price sensitive

Flavour key driver of differentiation

Not from concentrates 100% juice continues to be niche

## COMPETITIVE LANDSCAPE

RG Brands holds on to commanding lead

GalanZ Bottlers gains most volume share

## CHANNELS

Small local grocers lead retail distribution, but are losing volume share  
Significant volume sales through foodservice

## CATEGORY DATA

Table 81 - Off-trade Sales of Juice by Category: Volume 2020-2025  
Table 82 - Off-trade Sales of Juice by Category: Value 2020-2025  
Table 83 - Off-trade Sales of Juice by Category: % Volume Growth 2020-2025  
Table 84 - Off-trade Sales of Juice by Category: % Value Growth 2020-2025  
Table 85 - NBO Company Shares of Off-trade Juice: % Volume 2021-2025  
Table 86 - LBN Brand Shares of Off-trade Juice: % Volume 2022-2025  
Table 87 - NBO Company Shares of Off-trade Juice: % Value 2021-2025  
Table 88 - LBN Brand Shares of Off-trade Juice: % Value 2022-2025  
Table 89 - Forecast Off-trade Sales of Juice by Category: Volume 2025-2030  
Table 90 - Forecast Off-trade Sales of Juice by Category: Value 2025-2030  
Table 91 - Forecast Off-trade Sales of Juice by Category: % Volume Growth 2025-2030  
Table 92 - Forecast Off-trade Sales of Juice by Category: % Value Growth 2025-2030

## COUNTRY REPORTS DISCLAIMER

[RTD Coffee in Kazakhstan](#)

## KEY DATA FINDINGS

### 2025 DEVELOPMENTS

RTD coffee still an emerging product

## INDUSTRY PERFORMANCE

Healthy volume growth in 2025  
Volume sales continue to be low

## WHAT'S NEXT

Lower growth over forecast  
RTD coffee ripe for innovation  
Younger consumers drive volume growth

## COMPETITIVE LANDSCAPE

Two top players continue to dominate  
Little space for more premium players

## CHANNELS

Small local grocers lead retail distribution, but are losing volume share  
Minimal volume sales through foodservice

## CATEGORY DATA

Table 93 - Off-trade Sales of RTD Coffee: Volume 2020-2025  
Table 94 - Off-trade Sales of RTD Coffee: Value 2020-2025  
Table 95 - Off-trade Sales of RTD Coffee: % Volume Growth 2020-2025  
Table 96 - Off-trade Sales of RTD Coffee: % Value Growth 2020-2025  
Table 97 - NBO Company Shares of Off-trade RTD Coffee: % Volume 2021-2025  
Table 98 - LBN Brand Shares of Off-trade RTD Coffee: % Volume 2022-2025  
Table 99 - NBO Company Shares of Off-trade RTD Coffee: % Value 2021-2025  
Table 100 - LBN Brand Shares of Off-trade RTD Coffee: % Value 2022-2025  
Table 101 - Forecast Off-trade Sales of RTD Coffee: Volume 2025-2030

Table 102 - Forecast Off-trade Sales of RTD Coffee: Value 2025-2030

Table 103 - Forecast Off-trade Sales of RTD Coffee: % Volume Growth 2025-2030

Table 104 - Forecast Off-trade Sales of RTD Coffee: % Value Growth 2025-2030

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### RTD Tea in Kazakhstan

#### KEY DATA FINDINGS

#### 2025 DEVELOPMENTS

RTD tea best performing soft drink in 2025

#### INDUSTRY PERFORMANCE

Continuing thirst for RTD tea

Flavour innovation key driver of sales

#### WHAT'S NEXT?

Rosy outlook over forecast period

Continuing focus on flavours

Little demand for reduced sugar offerings

#### COMPETITIVE LANDSCAPE

Galanz Bottlers holds on to commanding lead

Fuze Tea registers explosive volume growth

#### CHANNELS

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

Significant volume sales through foodservice

#### CATEGORY DATA

Table 105 - Off-trade Sales of RTD Tea by Category: Volume 2020-2025

Table 106 - Off-trade Sales of RTD Tea by Category: Value 2020-2025

Table 107 - Off-trade Sales of RTD Tea by Category: % Volume Growth 2020-2025

Table 108 - Off-trade Sales of RTD Tea by Category: % Value Growth 2020-2025

Table 109 - NBO Company Shares of Off-trade RTD Tea: % Volume 2021-2025

Table 110 - LBN Brand Shares of Off-trade RTD Tea: % Volume 2022-2025

Table 111 - NBO Company Shares of Off-trade RTD Tea: % Value 2021-2025

Table 112 - LBN Brand Shares of Off-trade RTD Tea: % Value 2022-2025

Table 113 - Forecast Off-trade Sales of RTD Tea by Category: Volume 2025-2030

Table 114 - Forecast Off-trade Sales of RTD Tea by Category: Value 2025-2030

Table 115 - Forecast Off-trade Sales of RTD Tea by Category: % Volume Growth 2025-2030

Table 116 - Forecast Off-trade Sales of RTD Tea by Category: % Value Growth 2025-2030

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### Energy Drinks in Kazakhstan

#### KEY DATA FINDINGS

#### 2025 DEVELOPMENTS

Energy drinks prove very resilient

#### INDUSTRY PERFORMANCE

Further volume growth, despite ban on sales to under 21-year-olds

Reduced sugar energy drinks gain the most volume share

## WHAT'S NEXT?

Healthy volume growth over forecast period

Innovation, affordability and effective marketing drive volume sales

Further restrictions possible

## COMPETITIVE LANDSCAPE

Gorilla brands continues to dominate

Tassay makes quick impact

## CHANNELS

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

Significant volume sales through foodservice

## CATEGORY DATA

Table 117 - Off-trade Sales of Energy Drinks: Volume 2020-2025

Table 118 - Off-trade Sales of Energy Drinks: Value 2020-2025

Table 119 - Off-trade Sales of Energy Drinks: % Volume Growth 2020-2025

Table 120 - Off-trade Sales of Energy Drinks: % Value Growth 2020-2025

Table 121 - NBO Company Shares of Off-trade Energy Drinks: % Volume 2021-2025

Table 122 - LBN Brand Shares of Off-trade Energy Drinks: % Volume 2022-2025

Table 123 - NBO Company Shares of Off-trade Energy Drinks: % Value 2021-2025

Table 124 - LBN Brand Shares of Off-trade Energy Drinks: % Value 2022-2025

Table 125 - Forecast Off-trade Sales of Energy Drinks: Volume 2025-2030

Table 126 - Forecast Off-trade Sales of Energy Drinks: Value 2025-2030

Table 127 - Forecast Off-trade Sales of Energy Drinks: % Volume Growth 2025-2030

Table 128 - Forecast Off-trade Sales of Energy Drinks: % Value Growth 2025-2030

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