Soft Drinks in Kazakhstan

December 2025

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Soft Drinks in Kazakhstan

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

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

COUNTRY REPORTS DISCLAIMER

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

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Little room for more premium offerings

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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

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KEY DATA FINDINGS

2025 DEVELOPMENTS

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INDUSTRY PERFORMANCE

Healthy volume growth in 2025

Volume sales continue to be low

WHAT'S NEXT

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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

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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

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Energy Drinks in Kazakhstan

KEY DATA FINDINGS

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