



Carbonates in Pakistan

December 2025

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KEY DATA FINDINGS

2025 DEVELOPMENTS

Carbonates stabilises as brands rebuild momentum

INDUSTRY PERFORMANCE

Demand stabilises as boycotts ease
Lemonade/lime leads growth

WHAT'S NEXT?

Product innovation will be key growth driver
Customer engagement will be key focus
Sustainability will be central to brand strategies

COMPETITIVE LANDSCAPE

Multinationals remain dominant
Mehran Bottlers leads growth

CHANNELS

Small local grocers remain vital, especially in lower-income areas
Hypermarkets and e-commerce expand from low base

CATEGORY DATA

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EXECUTIVE SUMMARY

Urbanisation and channel expansion fuel consumption

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Favourable economic conditions and demographics boost demand for soft drinks

Health and wellness trends shape consumption habits

Retail expansion improves product accessibility

WHAT'S NEXT?

Stabilising economy will boost demand

Expected shift towards healthier offerings

Expansion of modern retail will increase access to packaged soft drinks

COMPETITIVE LANDSCAPE

Multinational giants hold sway

Mehran Bottlers is most dynamic player

CHANNELS

Small local grocers lead sales

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Foodservice vs retail split

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